

Concordance®

Administrator's Guide

Concordance, version 10.22

- **Creating Databases**
- **Indexing Databases**
- **Importing Files**
- **Creating and Managing Tags**
- **Setting Up and Managing Security**
- **Setting View Preferences**
- **Backing Up and Archiving Databases**
- **Managing Databases**
- **Managing Imagebases**
- **Concatenating Databases**
- **Exporting Data**
- **Preparing Productions**
- **Creating Reports**
- **Supporting Reviewers**
- **Troubleshooting**
- **Unicode Support**



Concordance Administrator's Guide

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Concordance®, version 10.22
Concordance® Native Viewer, version 1.11
Concordance® Image, version 5.16
Concordance® FYI™ Server, version 5.14
Concordance® FYI™ Reviewer, version 5.17

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Concordance

Administrator's Guide

About Concordance

Chapter

1

About Concordance

Concordance® is an electronic discovery, litigation document management, and litigation support tool. Concordance makes it easy to identify, organize and analyze case-critical information so that you can collaborate and share—across your firm or around the world.

Key Benefits and Features

Concordance gives you 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 key benefits and features Concordance offers:

- Holds documents of all types
- Contains a fast and efficient search engine
- Categorizes records with folders, tags, and issues
- Secures confidential data at various administrative levels
- Integrates with other litigation technology
- Offers remote access while traveling or in the court room

Using Concordance for Document Review

Document review typically involves searching for and marking up documents:

- Relevant to turn 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.

Concordance

Document Review Workflow

An Administrator loads a set of data into Concordance, creating the case database from which you'll work. He or she also sets up passwords and may enable or disable certain functionality.



Depending on the size of your organization, you may have a Litigation Support Manager or someone in your Information Technology groups that's in charge of administering Concordance.

Typically, you'll be assigned a set of documents to review, which may be organized for you tags. Your administrator will most likely set up tags in the database for categorizing documents as privileged or confidential, for example.



There are four types of data that can be loaded: electronic documents (e-docs), scanned paper documents (images and OCR text), email, and transcripts.

Reviewing & Producing Documents for Opposing Counsel

The objective of this review is to find those documents you do not want to produce to the other side and tag them as "privileged" or "confidential" (or redact them) so that only the appropriate information is handed over.

If you're reviewing documents to produce for opposing counsel, you'll most likely perform a page-by-page review. You might use simple search techniques on each document or just read through them. You will need to tag and mark-up documents as you review them.

Produce documents from Concordance for opposing counsel.

Reviewing Documents for Deposition or Trial

If you're reviewing documents for evidence to support your client, you'll be using more sophisticated searching, tagging, and document mark-up tools to analyze and review documents for key issues.

The objective of this review is to find documents that support your case, which may involve reviewing hundreds of documents to find perhaps only a dozen that you want to present as evidence.

Print documents for deposition, send to CaseMap, or send to an exhibit tool for trial presentation.

 Database Capacity

Database	Capacity
Number of documents	33 million
Concatenated databases	You can join up to 128 databases
Concatenated documents	Over four billion
Document Size	3 billion characters
Fields	250 custom fields
Characters per field	12 million
Database .ivt file	1/2 terabyte (512 gigabytes)
Database dictionary	1 terabyte

 Product Integrations

Concordance 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 integrates with the following tools:

- LexisNexis® Litigation Services product offerings:
 - Concordance Native Viewer
 - Concordance Image
 - FYI Server
 - FYI Reviewer
 - CaseMap®
 - LAW PreDiscovery®
 - Sanction®
- E.L. Native Review – Native review application by Electronic Legal Software
- Equivio® – Data redundancy management software by Equivio (Concordance version 10.19 or earlier)
- IPRO Tech – Litigation image viewer by IPRO Tech, Inc.
- Synthetix Search® – Linguistic patterning software by Syngence®

Concordance

Administrator's Guide

About Concordance Native Viewer

Chapter

2

About Concordance Native Viewer



Introduction to Concordance Native Viewer

Concordance Native Viewer allows you to view electronic files, emails, and attachments without the need to have the source software program installed. The viewer maintains the formatting of the files so that you can see them as they were originally created. The new viewer 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 Concordance.

- ✍ Concordance Native Viewer 1.0 and later is compatible with Concordance, version 10.10 or later. If you have an older version of Concordance and want to use Concordance Native Viewer, please contact Concordance Sales by e-mail at LitigationSalesGroup@ReedElsevier.com or phone at 1-800-421-8398.

Key Benefits and Features

Concordance Native Viewer provides:

- Near-native review of documents and images
- A new intuitive user interface for navigating and reviewing documents
- A single Concordance 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
- Silent install for installing on multiple workstations

- ⚠ With Concordance Native Viewer you can easily convert and view existing Concordance Image versions 3.x-5.x imagebase files. However, it is recommended that Concordance Native Viewer be used with new Concordance databases. Redlines applied to Concordance Image imagebase files prior to converting to Concordance Native Viewer Imagebase are not compatible with the new viewer and will not be converted with the image files.

Concordance

Administrator's Guide

About Concordance FYI Server and FYI Reviewer

Chapter

3

About Concordance FYI Server and FYI Reviewer

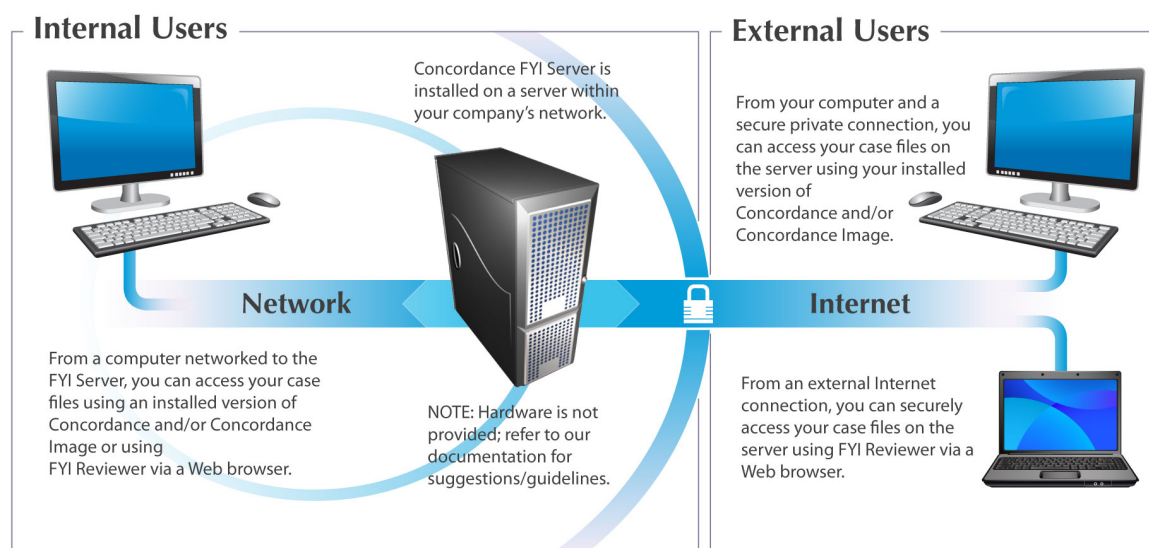
Concordance® FYI™ Server provides a secure, centralized server, offering remote access from the Internet and from your installed Concordance software while away from the office. With FYI Server you can bring your satellite offices, co-counsel, experts and clients together to collaborate on discovery documents in real time. As an Application Service Provider (ASP), you can host data for your client's cases.

What is FYI Server?

The Concordance FYI Server is a software product that provides secure, remote access to Concordance, Concordance Native Viewer, and Concordance Image through the Internet. Concordance users access databases and images as if they were accessing them from a local drive or server – there is no learning curve and generally all features work the same. FYI Reviewer™, an ActiveX control designed for Microsoft® Internet Explorer®, provides Web access to Concordance databases and is streamlined in functionality for reviewers.

Concordance version 10.x or later or FYI Reviewer version 4.x or later is required to access databases from FYI Server version 4.x or later. Concordance Native Viewer version 1.0 or Concordance Image version 5.x or later is required to access native documents and/or images. These products are licensed separately and are not included with FYI Server.

The secure, centralized FYI Server offers remote access from both a Web browser and the installed Concordance software. FYI Server is also highly optimized with data compression and RSA encryption for efficient and secure remote access, the same RSA 128-bit encryption that banks use for online transactions.

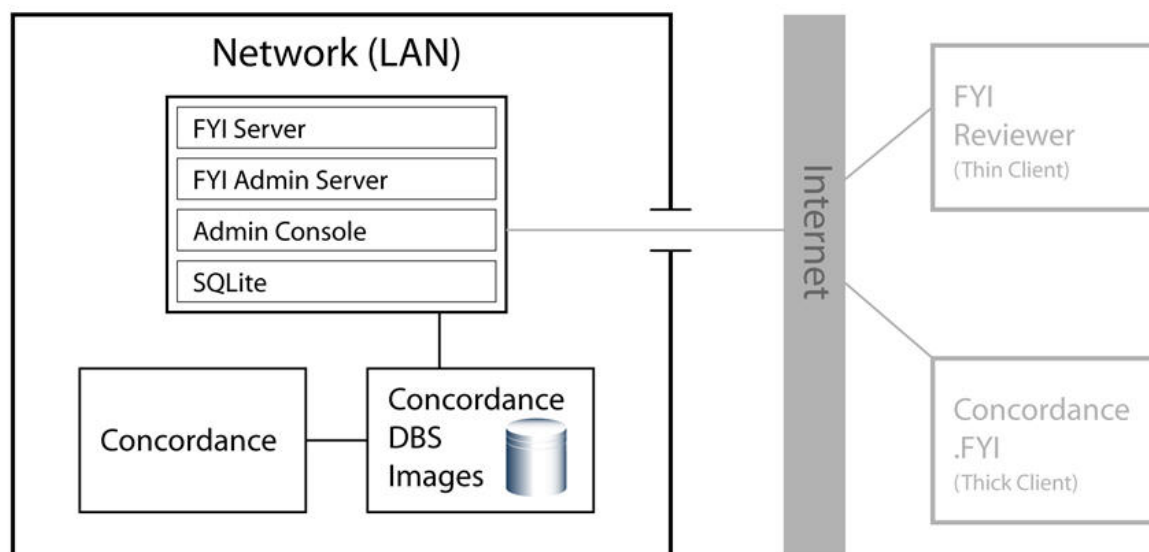


When implementing FYI Server, you are essentially installing two servers on your network with two services: one pointing to the client and one pointing to the administrator.

Concordance FYI Server includes:

- **FYI Server** – sends data to Concordance, Concordance Native Viewer, and Concordance Image (Opticon) clients. This is where most of the work is done.

- **FYI Administration Console Server** – works with the FYI Admin Console to control FYI Server.
- **FYI Admin Console** – user interface to manage FYI Server allowing administrators to publish databases, restrict access and change security settings, set performance parameters, and generate usage reports.



Network Distinctions between Concordance and FYI Server:

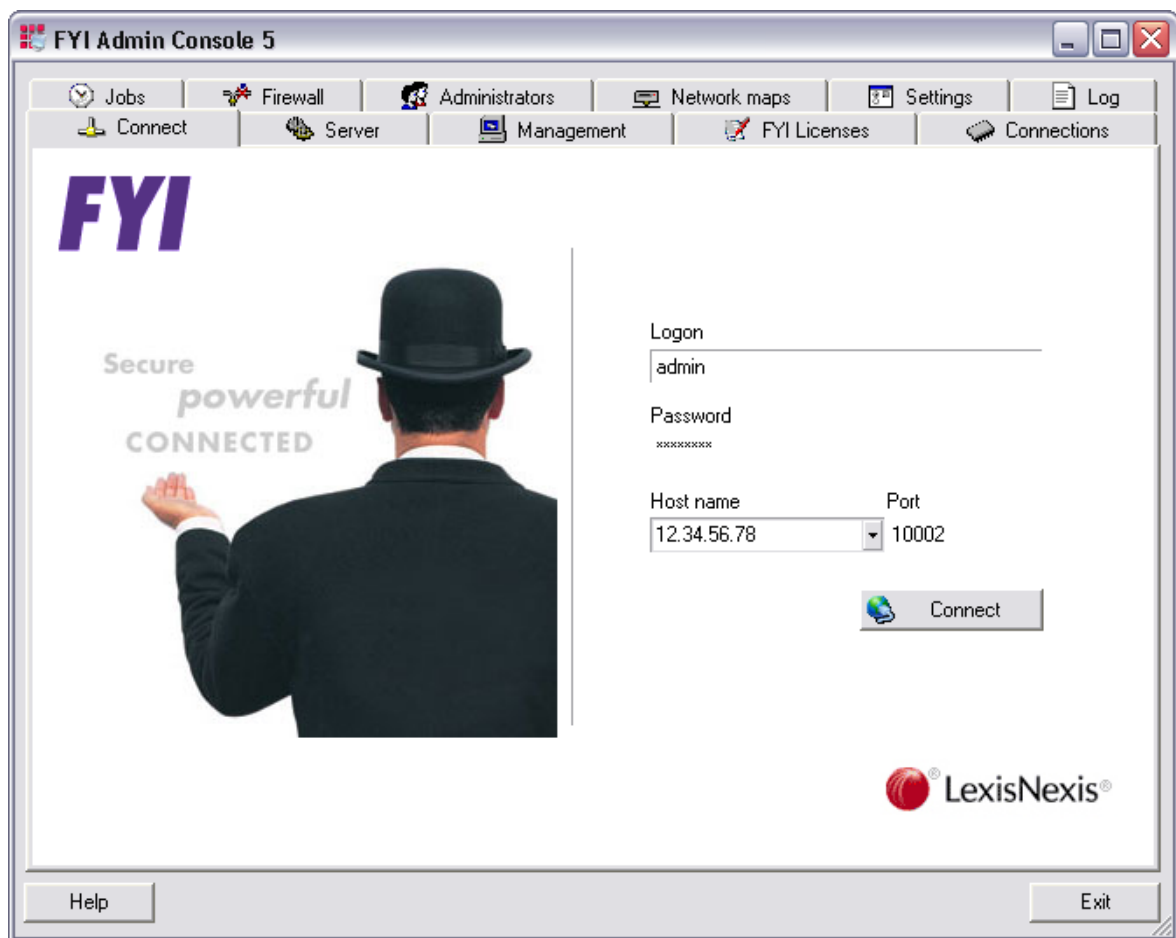
Network Distinctions: Concordance versus FYI Server		
Differences	Concordance	FYI Server
RAM used for processing searches, indexing databases	End-user machines	Server
Set IP address restrictions for connections	X	✓
Load data	✓	X
Reset Concordance password for all user's databases	X	✓
Broadcast messages to online users	X	✓
Kill user sessions	X	✓
Set Job Schedules	X	✓

Network Distinctions: Concordance versus FYI Server

Track Usage History	X	✓
Send Watchdog Notifications	X	✓
Can take databases offline	✓	X

 FYI Admin Console

All administrative functions are managed from the FYI Admin Console, which is installed during a typical installation. You can also perform administrative tasks from anywhere, at any time, if you perform a custom installation of the Administration Console and set it up for remote access.



The FYI Admin Console contains a series of tabs that allow you to manage the FYI Server and conduct your administrative tasks.

FYI Admin Console tabs include:

- **Connect** – initial logon window
- **Server** – shows basic activity load
- **Management** – used to register databases and manage users
- **FYI Licenses** – used to activate new license keys
- **Connections** – shows current connections, allows message broadcasts and killing of sessions
- **Jobs** – used to schedule index, reindex, and packing tasks
- **Firewalls** – sets server-wide IP address restrictions
- **Administrators** – used to create and manage administrators who can access the console
- **Network maps** – controls the UNC path and drive letter associations
- **Settings** – controls basic properties of the server, including port numbers
- **Log** – displays recent server activity

FYI Server administrative tasks include:

- Logging on
- Starting and stopping the FYI Server
- Registering and publishing databases
- Adding, deleting, and enabling user accounts
- Licensing FYI Reviewer seats
- Monitoring user status
- Broadcasting messages to online users
- Automating administrative jobs
- Managing firewalls
- Adding additional administrators
- Mapping network drives
- Modifying server settings
- Viewing log files

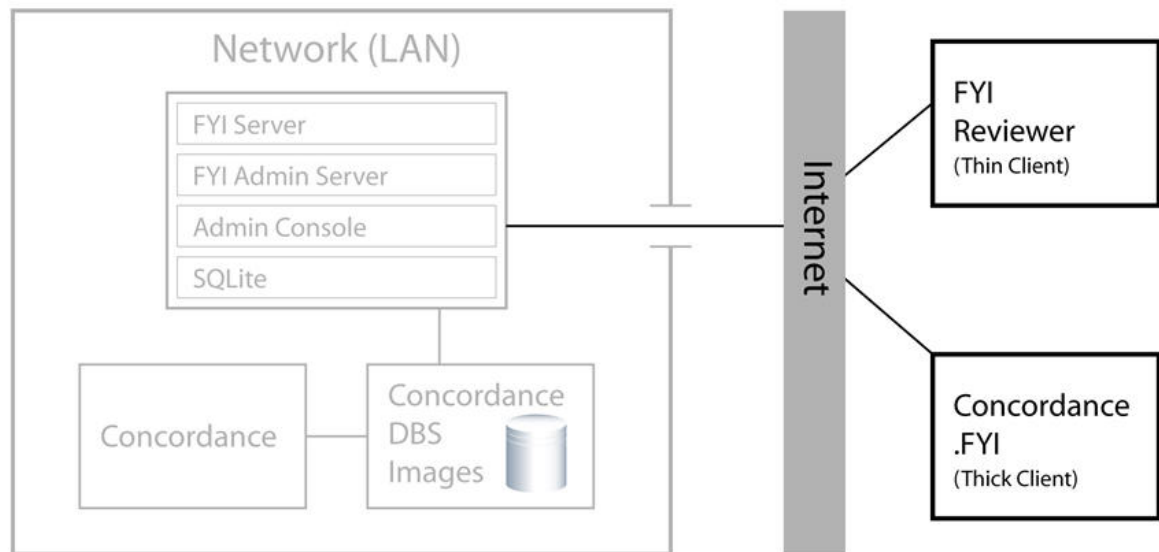
 FYI Server with Concordance and FYI Reviewer

FYI Server allows users to access Concordance in two ways, depending on your client's or organization's licensing and remote access needs.

Users can access Concordance databases in two ways:

- **Concordance .FYI** – (thick-client) full version of Concordance that includes administration functionality, such as indexing, reindexing, and security.
- **FYI Reviewer** – (thin client) streamlined version of Concordance specific to reviewer

functionality with an embedded image viewer.



Client Distinctions: Concordance .FYI versus FYI Reviewer		
Features	Concordance .FYI	FYI Reviewer
Local databases	✓	X
Remote databases	✓	✓
Runs in Microsoft Internet Explorer	X	✓
Editing and searching	✓	✓
Importing	✓	<i>Transcripts only</i>
Administrative features	✓	X

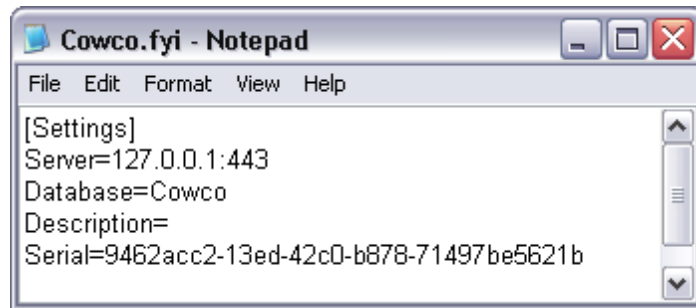
Working with Concordance .FYI

In the FYI Admin Console, you can create .fyi files that allow users to launch Concordance and open remote databases through the FYI Server.

A full version of Concordance needs to be installed on the client's computer and Internet access needs to be available. Users can access native documents and/or images if Concordance Native Viewer or Concordance Image (Opticon) is installed on their computer.

- FYI Server and FYI Reviewer versions 5.6 and later and Concordance 10.10 and later are compatible with Concordance Native Viewer version 1.0
- FYI Server and FYI Reviewer versions 4.x and 5.x are compatible with Concordance version 10.x and Concordance Image version 5.x.
- FYI Server and FYI Reviewer version 3.x are compatible with Concordance 2007, version 9.5, and Concordance Image version 4.50.

Concordance .FYI users have full Concordance functionality, except for modifying the database structure. Concordance .FYI users cannot access the Modify command on the File menu.

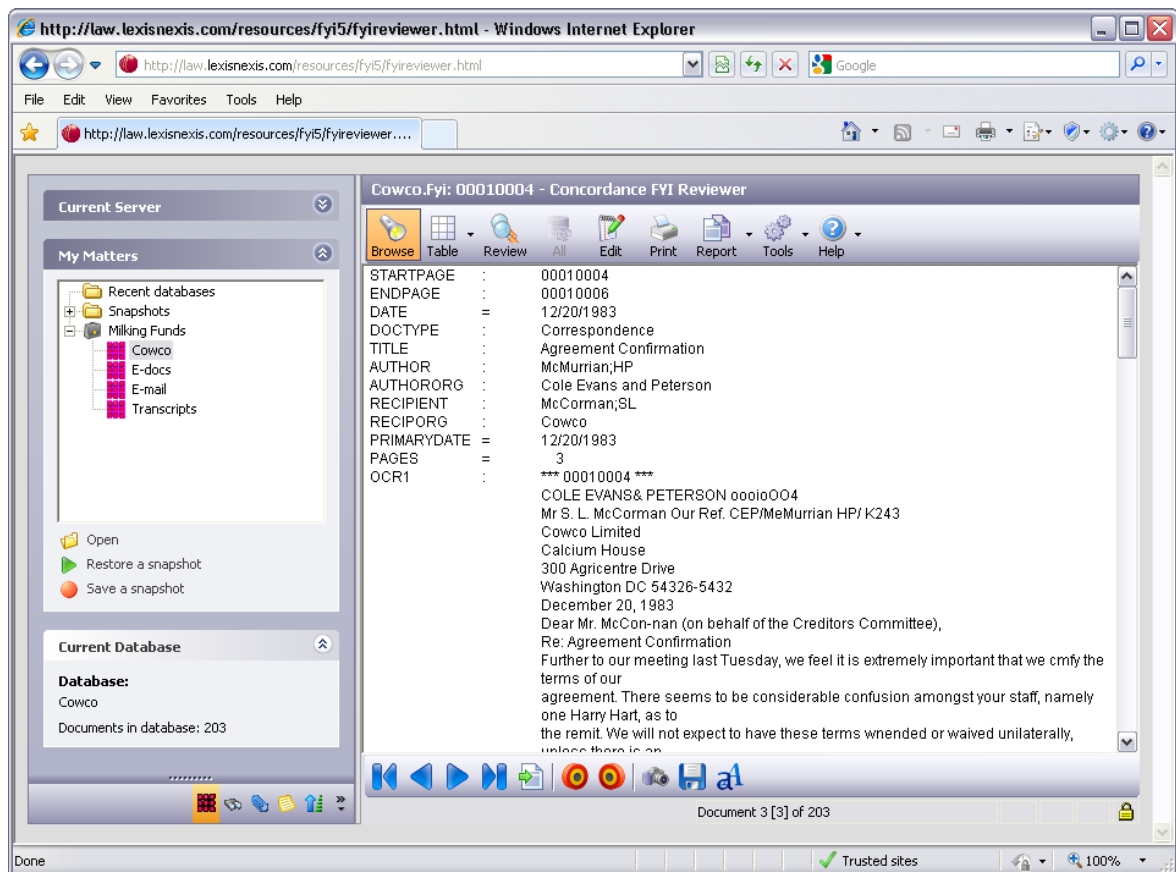


The .fyi file contains the connection information needed to address the FYI Server and request the database. It includes the server IP address and port number, which can be viewed in a text editor program. Users receive access when you email them the .fyi file pointing to the database, along with their Concordance user name and password.

For more information about the Concordance FYI file, see Working with FYI files and Distributing the FYI file to users.

Working with FYI Reviewer

FYI Reviewer is a Web browser *plug-in*, also known as an ActiveX control that runs inside Microsoft Internet Explorer 6.x or later, providing access to FYI Server databases. You do not need Concordance, Concordance Native Viewer, and Concordance Image (Opticon) software to use FYI Reviewer, because FYI Reviewer is a thin client and server application. The image viewer is included as part of the FYI Reviewer software.



FYI Reviewer can run on any modern workstation or laptop that runs the latest version of Microsoft® Windows® and Internet Explorer with access to the Internet.

The FYI Server administrator publishes databases for FYI Reviewer users in the FYI Admin Console. Users can view the published databases when they log on to FYI Reviewer (if they have security access to the database). Users receive access when an e-mail is sent containing the URL or Web site address to FYI Reviewer, along with their FYI Reviewer user name and password, and specified server and port address information.

For more information about publishing databases, see Publishing databases.

For more information about FYI Reviewer, see Installing FYI Reviewer and Distributing FYI Reviewer to users.

Hosted FYI

If your organization does not want to host its own Concordance databases, LexisNexis can do it for you – providing a secure, centralized data hosting server environment with a multi-user review tool to access your data via the Internet.

Hosted FYI allows you to outsource risks and technology burdens by offloading that responsibility to LexisNexis. Doing so helps you by:

- Improving your financial control by reducing internal administration and infrastructure costs.
- Charging you only for what you use (users, document hosting, etc.) with simplified billing in one statement,
- Employing fail-safe disaster recovery with high security user log-in and exclusive public/private folder access to your data.

LexisNexis has a proven review platform and an industry standard, award-winning interface that is successfully employed by the largest cases litigated today. With a trusted third-party like LexisNexis hosting your data, you can regain the freedom of focusing on case strategy.

Concordance

Administrator's Guide

What's New in Concordance

Chapter

4

What's New in Concordance

The following enhancements are included in the Concordance version 10 release. For more release information, see the Release Notes.

Concordance v10.21

[E-documents database creation improvements](#)

E-document database creation has been streamlined to improve performance of data creation. The new E-document database creation engine processes and normalizes the data for improved functionality across all forms of native documents, creating a consistent document display (PDF formatted files) and improved doc-to-doc navigation for Concordance Native Viewer. For more information, see [Creating an E-documents database](#).

[Appending existing E-documents database improvements](#)

Quickly add new documents to an existing E-documents database using a simple file drag-and-drop operation. For more information, see [Adding eDocuments](#).

[Tag management improvements](#)

Organize tags and folders within the Tag and Issues Management dialog or the Tags task pane using a drag-and-drop operation. For more information, see [Organizing tags and Managing tags and folders](#)

[Native file production](#)

The Native File Production feature produces a copy of an original native file(s) to a production destination and renames the file(s) using defined production parameters. The produced documents do not include any markups or annotations. For more information, see [Running a Native production](#).

[Concordance Native Viewer keyboard shortcuts](#)

Keyboard shortcuts are now available for Concordance Native Viewer. For more information, see [Keyboard shortcuts](#).

Concordance v10.20 and earlier

[Previous enhancements:](#)

[Persistent Search Hit Highlighting](#)

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. For more information, see Using Persistent Search.

[Find Attachments Search feature](#)

When searching a database that has documents and attachments, the Find Attachments feature, scans the database to return the documents and any related attachments with the search results. For more information, see Finding attachments.

[Tag documents and attachments feature](#)

The Tag all documents & attachments feature has been added to the Tags panel to quickly tag records and any related attachments. For more information, see Tagging records.

[Edit View Layouts](#)

Edit view layouts specify which fields and the order the fields are displayed within the Edit view. Each database may contain multiple edit layouts that can be quickly accessed from the Edit menu. Similar to Table and Sorting layouts, the Edit View layout is saved as a .Editlayout file in the database folder and can be shared between databases and with other users. For more information, see Creating edit layouts.

[Streamlined Data Import Wizard](#)

The New Database Creation Wizard provides a step-by-step workflow for creating new load file, E-documents, and E-mail databases. For more information, see Creating a database with load files, Creating an E-documents database, and Creating an Email and Attachments database.

[Concordance Native Viewer Sticky Zoom and Sticky Rotate](#)

The Sticky Zoom and Sticky Rotate features make review much easier by changing the page layout to a landscape or portrait view and maintains the zoom and position while navigating between records. For more information, see Magnifying native files.

[Performance improvements for importing E-documents](#)

The E-documents import feature has been redesigned for better performance when loading electronic documents into a Concordance E-documents database. For more information, see Importing eDocuments.

[Managing page count for Concordance Native Viewer](#)

New page count feature for managing document page counts for the imagebase. For more information, see Setting page count.

[Backup and Restore Tag Utility](#)

Utilizing Windows Services, the Backup and Restore Tag Utility scans specified database directories, locates the TRK file and saves a copy of the file. When a damaged or non-functioning TRK file is detected, the utility automatically sends an email notification and provides tools to restore the file to an earlier point in time. For more information, see Scheduling tag backups.

Sorting Layouts for Records

Create and save record sorting layouts for individual databases that can be accessed from any workstation. For more information, see Sorting documents.

Field selection for Edit view

To make editing easier, Concordance Edit command provides the option to view only those fields that require editing and arrange the fields in any order to fit your editing needs. For more information, see About editing records.

Concordance FYI Server Dual Authentication

Authentication of users against one or two Active Directory LDAP Servers. This option gives administrators the ability to have outside reviewers (outside meaning co-council, corporate clients, or reviewers outside the firm) to be on a separate Active Directory LDAP server and not on the internal network server. For more information, see Setting authentication types.

Delimited Text Database Creation Wizard

The Delimited Text Database Creation Wizard provides the easiest way to create a database, import data, OCR text and link media files for viewing in Concordance Native Viewer or Concordance Image. For more information, see Using the database wizard.

OCR on the Fly

Concordance Native Viewer version 1.03 provides OCR processing for a single page or an entire document and writes the data back to a specified field in the corresponding Concordance record for indexing and searching. For more information, see About OCR processing.

Import and Export Tags

Streamline tag creation using the Import and Export Tag options in the Tag and Issue Management dialog box. Import a list of tags and folders into a database from a text formatted (.txt) file or export the tags and folders in an existing database to a text file that you can then import into another database. For more information, see Importing and Exporting Tags.

Integration of the TagToField and FieldToTag CPLs

Write Tags to a specified field or create Tags from values within a specified field from the Tag and Issues Management dialog box in Concordance. For more information, see Creating and applying tags and Backing up tags.

Performance improvements for loading and converting imagebase files

Improved performance when loading imagebase files for Concordance Native Viewer or converting existing Concordance Image imagebase files for use with Concordance Native Viewer.

BulkBackUpTag Utility

Create a back up of the contents of multiple database .TRK files within a single directory, including all sub-directories when specified, in the associated database .GAT files. For more information, see Backing up tags.

Configure FYI Server SMTP Port

FYI Server SMTP Port is now configurable to match your company's outgoing mail transport server. For more information, see Adding additional administrators.

Individual company branding for FYI Reviewer

Customize FYI Reviewer by adding your company logo to the FYI Reviewer login page. For more information, see Hosting FYI Reviewer locally.

Support for silent installation of Concordance Native Viewer

Concordance Native Viewer version 1.01 includes support for silent installation, allowing you to install the application on multiple workstations from one location. For more information, see Performing silent installs.

Native Viewer for Concordance

Using Concordance with the new Concordance Native Viewer you can view near-native documents and images without the need to open a document in its native application. For more information, see Working with media files.

Manage imagebases and productions from Concordance

Concordance Native Viewer imagebases and productions can now be managed and processed through Concordance. Using the new image base management tools (File > Administration > Image Base Management), you can rename paths and folders, rename media keys/aliases, and export multiple imagebases to a single OPT formatted file. For more information, see About CNV imagebase management.

The new production module in Concordance provides all the tools you need to produce color or grayscale TIFF or PDF files. For more information, see About productions.

Bulk printing for Concordance Native Viewer documents

The new print module in Concordance provides all the tools you need to print documents in color or grayscale. For more information, see Printing document sets in Concordance.

Initial Browse Path mapping

Always Map Initial Browse Path option ensures that any instance of a Concordance install opens the default path that is defined on the server. For more information, see Defining

preferences.

FYI Server email notifications

FYI Server administrators can now choose to receive email notifications for jobs that have succeeded and/or failed. For more information, see Adding additional administrators.

Support for Microsoft Windows 7 and Windows Server 2008

Concordance, Concordance Native Viewer, Concordance Image, and FYI Server are now compatible with Microsoft Windows 7, Windows Server 2008 SP2 and Windows Server 2008 R2.

As a result of changes to the location of the application data files, if you are upgrading to the latest version of Concordance, Concordance Image, or FYI Server, depending on the version you currently have installed you may be required to uninstall the older version prior to installing these applications. The new default location for application data files is *C:\Documents and Settings\All Users\Application Data\LexisNexis\...(Windows XP)* or *C:\ProgramData\LexisNexis\...(Windows 7)*.

Product	Version	Uninstall required?
Concordance	8.x or 9.x	No
	10.7 or earlier	Yes
Concordance Image	4.x or earlier	No
	5.04 or earlier	Yes
FYI Server	4.x or earlier	No
	5.02 or earlier	Yes

For more information about installing, see Installing Concordance, Installing Concordance Image, or Installing FYI Server.

Tags and Tag Folder renaming

Tags and tag folders can now be renamed in the Tags and Issues Management dialog box. Similar to renaming a folder on your computer, simply click the Rename button and type the new tag or folder name. Concordance automatically updates all tagged records with the new tag name.

For more information about renaming tags, see Renaming tags and folders.

Support for the Unicode™ Standard

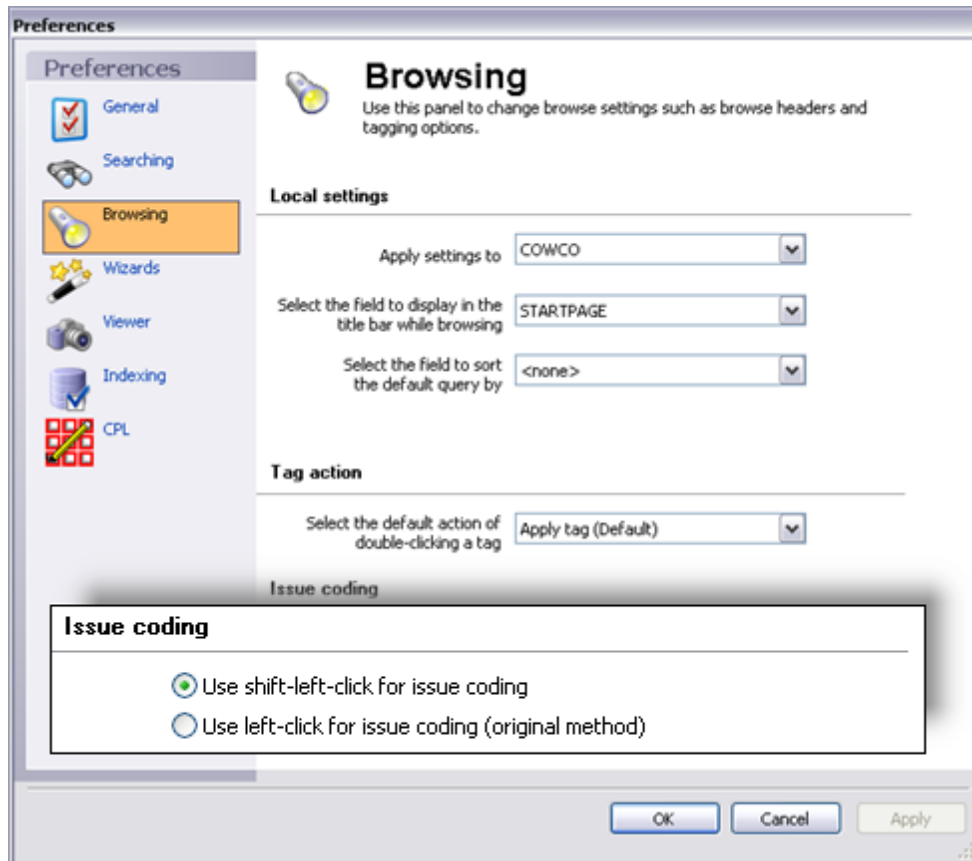
In Concordance version 10, the Unicode Standard is supported in Arabic, Chinese, English, Hebrew, Japanese, Korean, Russian, and other languages.

For more information about support for the Unicode Standard, see About the Unicode Standard.

New Browse Option

The Issue coding option is now available on the Browsing panel in the Preferences dialog box.

The Issue coding option allows the user to choose whether to code issues by simply clicking a *tag* when text is selected or requiring the shift key to be held down. The default is shift-left-click.



For more information about the Issue coding option, see [Defining preferences](#).

Menu Security Restricts Interface Access

When access to a menu item is restricted, access to that functionality is restricted in all parts of the interface. This includes the navigation bar, keyboard shortcuts, and toolbars.

For more information about menu security, see [Setting up security](#).

Conversion Report

The Conversion Report, a comma-delimited conversion log file, is now generated at the end of the database conversion process when you are converting databases to Concordance version 10.x or later. When the database conversion completes, Concordance generates and saves the Conversion Report - [database name]-[date].csv file in the same directory as the converted databases.

You can convert individual databases using the Convert Single Database utility or convert multiple databases at one time using the Bulk Convert Databases to Current Version utility from the Administration option under the File menu.

For more information about the Conversion Report, see About the Conversion Report.

For more information about converting databases, see Converting databases.

Integration with Equivio (Concordance version 10.19 or earlier)

Equivio is an optional companion product for Concordance E-mail and Attachments databases. In Concordance, Equivio highlights the textual differences between two e-mail documents. Equivio helps you identify and skip redundant text during document reviews in Concordance, allowing you to focus on the unique text in each e-mail message.

For more information about using Equivio with Concordance, see Using Equivio with Concordance.

TRK Maintenance Tool

The TRK Maintenance Tool is now available from the Administration option under the File menu in Concordance. Administrators can use the TRK Maintenance Tool to scan all tags in the currently opened database, and , if necessary, repair tagging inconsistencies in the TRK file.

For more information about the TRK Maintenance Tool, see Scanning and repairing the .TRK file.

Bulk Field Format Reset

The Bulk Field Format Reset feature is now available from the Administration option under the File menu in Concordance. The Bulk Field Format Reset feature allows you to remove rich text formatting from a field in multiple records at one time to save space or remove certain text formatting that affects the precision of hit highlighting when searching in Concordance.

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

Concordance

Administrator's Guide

Administering Concordance

Chapter

5

Administering Concordance

Creating Databases

About Concordance databases

We recommend preparing and outlining your database field structure in advance. This may involve discussions with a lead attorney and key people involved in the case. Making changes to the database structure once data has been loaded has a high potential for database corruption, so careful preparation helps minimize the need for changes later.

Use the database checklist to assist you when you first begin creating and indexing databases to ensure that you understand each step of the process and don't forget to verify critical data.

⚠ Making changes to your database template is the number one way to corrupt your database. It is important to prepare and outline your field structure in advance to avoid changes after data has been loaded.

Database Capacities

The Database Capacities table lists the capacities for each of the database elements.

Database Capacities	
Database	Capacity
Number of documents	33 million
Concatenated databases	128
Concatenated documents	Over four billion
Document size	3 billion characters
Fields	250
Database .ivt file	1/2 terabyte
Database dictionary	1 terabyte
Database file path name	199 characters in length

Database Checklist

Checklist: Database	
	Data Review
☐	Do you know how many documents or gigabytes (GB) of data have been received?
☐	Are your files converted to types that are recognized by Concordance?
☐	Do you understand Concordance field structure and how it affects importing data?
	Review Load Files
☐	Have you reviewed the contents of the data volume you are about to load?
☐	Have you reviewed your data load file for acceptable delimiters and date formats?
☐	Do you have fields set in place for data that you are importing?
☐	Have you verified that the bates number for the first record to be loaded does not overlap with the last bates number used in the existing collection? If it does overlap, a correction should be requested from the source prior to loading.
☐	Did you receive an image load file along with your images? If not, you can create one.
☐	Did you adjust the directory path of your image load files, if need be?
☐	Have you verified that your alias in the image load file matches the Image field in the Concordance database?
☐	Have you reviewed how your OCR has been formatted, named and organized? Do you know which CPL to use for import if the OCR was not included in the .dat file?
☐	Importing a .pst file requires that a user profile is set up for each user in Microsoft Outlook. Have you completed this process?
	Database Structure
☐	Did you create a database template that includes administrative fields?
☐	Did you select an image key field for your images?
☐	Did you validate the EDITTRAIL and CREATEDATE fields?
☐	Did you index all fields needed for full-text searching?
☐	Did you create additional miscellaneous fields?
	CPLs
☐	Did you verify supported CPLs for your current Concordance version by reviewing

Checklist: Database

the ...\\Program Files\\LexisNexis\\Concordance 10\\CPL folder (Windows XP), ...\\ProgramData\\LexisNexis\\Concordance 10\\CPL folder (Windows 7), or About CPL Scripts Help topic?

You can download a fresh CPL scripts from <http://lexisnexis.com/concordance/cpl-library>.

Case Review

☐ Have you reviewed case records to understand what types of files you are importing?

☐ Did you review case records to plan your field structure?

☐ Do you understand what types of reports you may be generating for maintenance and to support reviewers?

☐ Do you understand the file and media requirements for print productions, especially for opposing counsel?

Ongoing Maintenance

☐ Have you outlined maintenance processes and schedules that affect your new databases?

About Concordance database files

Each Concordance database uses several files during operation. Only four are absolutely required to open and use a database. The four mandatory files are the database control block (.dcb), the numeric, date, and text file (.ndx), the text file (.txt), and the security file (.sec). The security file only exists for Concordance version 6.0 and later databases, and only if security has been enabled. All of the other files can be recreated without damaging the integrity of the data. At a minimum, these four files should be backed up for archival purposes.

For more information about backing up databases, see About backing up databases.

 A B-tree file uses a tree data structure to provide fast search results. The tree data structure minimizes the number of times the database is accessed when searching for a record, resulting in faster searches.

 The .TRK file in Concordance version 10.x uses SQLite. SQLite is an embedded relational database engine, which brings more stability to the functions of the .TRK file. Because SQLite is an embedded database, SQLite does not increase the required maintenance and administration of Concordance.

 Concordance Database Files

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.arf	Annotation reports	Contains the annotation report definition Used by the annotation report writer		
.arp	Report writer	Contains report definitions in plain text These files are created and saved by the report writer, and can be edited with any text editor program		
.cat	Concatenation	Stores a list of concatenated databases		
.cib	Imagebase	Stores association between media keys and native and image files including markup history (<i>Concordance Native Viewer only</i>)		SQLite file
.cpl	CPL script	Store Concordance Programming Language (CPL) scripts		
.cpt	CPL script	Stores compiled versions of CPL script		
.csv	Security	Stores field and menu access for all users (when exported by user)		
.dat	Delimited text	Contains metadata and sometimes OCR for document records		
.dcb	Data control block	Database definition, including fields, document count, and other settings		
.dct	Dictionary	All unique words in the database, in alphabetical order This is not a plain text file, it cannot be read or edited by a text editor or word processor	B-tree file	
.dir	Imagebase	Stores image keys (<i>Concordance Image Only</i>)		

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.fmt	Print settings	Saves print settings for reports generated using the standard print feature User generated file		
.fyi	Concordance FYI Server database	A link file that opens a database on a remote FYI Server		
.fzy	Fuzzy search dictionary	The fuzzy search dictionary contains homonyms for words in the search dictionary This file is created and updated by indexing and reindexing	B-tree file	
.gat	Back Up	A tag backup file that stores tagging information. Generated by running the TagSaver_v[version #].cpl		
.ini	Configuration settings	Stores various configuration settings		
.ivt	Inverted text	Used with the dictionary during searches		
.key	Key fields	Field storage for fast relational searching	B-tree file	
.layout	Table layout	Stores the defined table layouts	B-tree file	
.sortlayout	Sorting layout	Stores the defined sorting layouts for the current database		
.lst	Word lists	Contains predefined values that can be selected from a list when editing fields When a list is assigned to a specific field, it's called an Authority List	B-tree file	
.ndx	Numeric, date, and text fields	Stores data for the fixed length field types: Numeric, Date, and Text		
.opf	Print settings	A Concordance Image print file		

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
		that stores print settings for print jobs generated by Concordance Image (<i>Opticon</i>) User generated		
.qry	Query	Stores search query strings		
- redline s.dcb	Database	Stores markups and notes (<i>Concordance Image Only</i>)		
.sec	Security control	Stores passwords and security settings Erasing this file can lock up a database if security is enabled	B-tree file	
.snp	Snapshot	Stores search history and auto-restore settings		
.stp	Stopwords	Contains the noise words that are ignored during database indexing	B-tree file	
.syn	Synonyms	Stores the user defined synonyms	B-tree file	
.tag	Tagged records	Tracks document tagging Note: This file is no longer used with Concordance version 9.5 and higher	B-tree file	
.tex	Text	Full text paragraph field storage		
.trk	Transaction tracking	Relational SQLite file structure that stores tags and tag histories, security (field and menu access for all users) and replication data		SQLite file
.vol	Volumes	Stores image volume information (<i>Concordance Image Only</i>)		
.xrl	Markup	Stores the current state of markups and placeholders (<i>Concordance Native Viewer Only</i>)		

Temporary Files

Concordance creates and uses temporary files, which are automatically erased when you leave the program. However, temporary files are not erased if there is a power outage or other problem which causes an irregular program termination. Concordance places the files in the system's temporary directory as defined by the Windows TEMP environment variable. The two most common functions that create temporary files are indexing and reindexing.

When indexing a database, two temporary files are saved in the local computer's temp directory. Both files begin with the prefix C- and end with the .tmp extension. These files represent the temporary .dct and .ivt files. They are not initially saved on the network server since network latency would severely decrease performance. When indexing is complete, the resulting .dct and .ivt files are copied to the network server.

When reindexing a database, the same temporary files are saved in the local computer's temp directory. In addition, a temporary dictionary file with a .dcb file extension is saved in the local computer's database directory. This file contains information from the newly created records. Near the end of the reindexing process, this dictionary file is merged with the main dictionary file on the network server.

For more information about indexing and reindexing, see *About indexing databases*.

Managing data files

Files can be received from a client, data processing vendor, or third party. When receiving data, you should always review all files on the disk, prior to loading the data, to ensure they have the proper formats for Concordance.

Load files or delimited text files are one of the files used to construct your Concordance database. These files typically have extensions ending in .dat, .csv, or .txt. Each file contains record metadata, but some may also include body text. We recommend having your OCR separated into individual text files and imported separately using a CPL script.

As an administrator, you should always make a practice of opening and reviewing your delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

When reviewing your data load files, always check for the following:

- **Field names** – each line of metadata is one record, check each header column to verify data
- **Delimiters** – unique characters that appear in the delimited text file and do not exist in your actual data
- **Date format** – date fields are an 8-character maximum with slashes. If dates include slashes, you can import any format. If slashes are not used, then you must use the universal date format of YYYYMMDD or the mm-dd-yyyy date format with dashes.
- **Carriage return** – a final carriage return ensures that the last record will load into the database.

Concordance Delimiters

Comma	Field break indicator, default is ? (ASCII 20), customizable, avoid characters in data
Quote	Keeps text together, default is ¨ (ASCII 254) and is only required around fields that have text and spaces, customizable, avoid characters in data
New Line	Manual line break and text wraps within a field, default is ® (ASCII 174), customizable, avoid characters in data
New Record	Starts a new record, final carriage return loads the last record, cannot be changed, industry standard

- ✍ Delimiters are customizable for an organization's internal database design, but many organizations ask vendors to use Concordance default delimiters. If your case records contain the registered trademark symbol, you may want to consider changing the ® to another symbol in the load file.

About fields

Before you begin your database construction, it's important to understand the types of data you will receive, and how that information can be categorized into the data format of Concordance fields.

☞ Concordance Data Field Types

There are two basic field categories available in the Concordance system: defined length fixed fields and variable length paragraphs. The full-text paragraph fields are the most flexible and most commonly used type in a Concordance database.

Fixed fields are always a pre-defined length and contain numbers, dates, or short amounts of text. Documents in a Concordance database can be sorted by the contents of both fixed fields and free-text paragraph fields, but fixed length fields sort much faster. Data in fixed fields is typically searched using relational *comparison* search operators such as =, >, and <, however fixed fields can be fully indexed and searched using full-text techniques as well.

Fixed length fields have unique applications when compared to full-text paragraphs. While paragraph fields are flexible and variable in size, they do not sort quickly or search easily by comparison.

- Fixed-length fields sort the fastest.
- Fixed fields display faster in Table view than Paragraphs. This is useful in long document databases.
- Relational searches for dates and numbers work best when they are stored in Date and Numeric fields.

- Numeric and date math using the Report Writer or using Concordance's programming language work best with Date and Numeric fields.

Use the following table as a reference when you review your data.

Concordance Data Field Types			
Data Type	Capacity	Type	Notes
Date	8 bytes	Fixed	Just for dates, keyed by default
Numeric	1-20 digits	Variable	Currency, zero-filled, comma, keyed by default
Text	1-60 characters	Variable	Alphanumeric, keyed by default
Paragraph	12 million characters	Fixed	Alphanumeric, indexed by default, allows rich-text format

 If you want a field to be full-text searchable, make it a paragraph type. Reviewers using the Browse view will then understand that fields with an = sign are for relational searches and fields with a : sign are full-text searchable.

Understanding Field Structure and Applying Properties

Concordance does not have a pre-defined field structure and there are no required fields. However, preliminary planning in how you construct fields and apply properties to each is essential.

Concordance's field profile includes:

- No predefined structure, no required fields
- Maximum of 250 fields per database
- Field Name maximum of 12 characters, including:
 - Letters
 - Numbers at middle or end
 - Underscoring in the middle only
- Field names are stored in capital letters
- Field name saves when the data type is selected

 Media (image) key field names with Unicode characters are not supported.

Concordance Field Properties:

Concordance Field Properties

Image (Concordance Image Only)	Indicates which field contains the image key or alias, only selected once per database and is usually the BEGNO field.
Media (Concordance Native Viewer Only)	Indicates the field that contains the media key or alias, only selected once per database and is usually the BEGNO field.
Key	Speeds sorting and relational searching (adds values to database .key file), keying everything dilutes the value
Accession	Copies UUID in system table into visible field, good for sorting by load order, great for tracking gaps
System	Field cannot be seen by users, Concordance creates these for replication/synchronization information
Indexed	Enables full-text searching (adds values to .ivt and .dct files)

Guidelines for Creating Fields:

Guidelines for Creating Fields

Bates Numbering	A unique serial number used to identify a record. When setting up the numbering system, think of the longest number you might need given your case record load. Designate a length that is large enough so data does not truncate. Choose text as the field's properties in case you need an alphanumeric system implemented.
Media field (Image field)	Select the Media (Image) Key setting to indicate the media key or alias field. You can click the View image (camera) button to launch and link the imagebase files with the corresponding Concordance database records. Only make this selection once per database for a unique field, this is generally the BEGNO field.
Keyed fields	Select the Key setting to improve sorting and relational searching speed.
Indexing	Indexing puts data into the dictionary and index. You can index any data type. Paragraph fields are indexed by default. Full-text searching only works on indexed fields. Avoid indexing unique values, serial, Bates numbers, and dates to optimize the full-text searching speed. Use relational searching for non-indexed fields.
OCR2 field	This field is created as an overflow field for OCR1, just in case the 12 million character limit for OCR1 is exceeded. This field name must have the same alpha prefix as the primary field and the numeric suffix must be a consistent width and start at 1. Fields must be entered in order by suffix. Use the ReadOCR_v[version #].cpl if you need this overflow field.
Punctuation	Your customizable Punctuation list designates what punctuation you can use for full-text searches, as long as the characters are embedded between alphanumeric characters and are within quotes. You only

Guidelines for Creating Fields

	need to set punctuation once for each database.
Dictionaries/ Indexes	Big dictionary and index files slow search processing. Do not bloat these files with unnecessary entries; build stopword lists to exclude them.
Field Validation	Some fields require additional attributes for tracking purposes, like EDITTRAIL and CREATIONDATE date fields. These attributes are set in the Data Entry Attributes and must be added before importing load files in order to the capture information.
Table view	Field column width in Table view is determined in the Types setting in the Modify dialog box. The default column width is the field length identified in the Data Types table, and as set in field properties. And by default, paragraph fields aren't included in Table view to keep display speed optimal. You can customize Table view to include paragraph fields at any time.

Additional Fields and Naming Conventions

Use the following table as a reference when planning your database field structure. You may find that adopting the use of these fields is beneficial to your administrative functions or provides alternative naming conventions for fields previously mentioned. Use this table to brainstorm other fields that make sense to your organization's processes and use of Concordance.

Additional Administrative Fields and Alternative Naming Conventions

Field	Type	Settings
Serial Numbers	Text	Can be used to link to image files if BEGNO is not used. May have many serial #s during the life of a database, usually matched with the .tif file name as the first field in the database.
BEGBATES BEGDOC STARTPAGE	Text	Alternative field names for BEGNO.
ENDBATES ENDDOC ENDPAGE	Text	Alternative field names for ENDNO.
DOCNO	Text	Document number, an alternative to using serial numbers key to the page, more common

Additional Administrative Fields and Alternative Naming Conventions		
Field	Type	Settings
		in e-documents that are not .tif files.
BEGATTACH	Text	Used to denote attachment range.
ENDATTACH	Text	Used to denote attachment range.
INCLUDES	Text	Holds Bates or control numbers of all pages inside the document, facilitates searching for middle page .tif files.
PARAGRAPH	Paragraph	Alternative name for DOCTYPE field.
Document metadata fields	Paragraph	Also called bibliographic metadata fields. Typically includes author, recipient, custodian, dates (sent, received filed, etc.), subject, title, etc. Generally this information is visible on the face of the document.
System metadata fields	Paragraph	Typically includes information captured automatically by the computer like last access date, modification date, and print date. This information may not appear on the face of the document.
TEXT1 TEXT2	Paragraph	Alternative naming convention for body text fields like OCR1, OCR2, OCR3. Used by ReadOCR_v[version #].cpl to hold imported OCR text. If these fields are named with the same alpha prefix (TEXT for example) and have numeric suffixes that start with 1, are the same numeric length, and are in order ascending by suffix, the CPL script overflows additional text into subsequent fields, as needed.
BODY, TEXT or MESSAGE	Paragraph	Naming conventions for e-documents that are not OCR scanned, fields names are usually with numeric suffixes.
ATTACHMENT or FILEPATH	Paragraph	Customarily used to hold a clickable hyperlink to the native document in electronic format. If this field contains a file path or web address, running the CreateHyperlinks_v[version #].cpl converts it to a hyperlink. Another use is for this field to hold the Bates number of records in Concordance, which are

Additional Administrative Fields and Alternative Naming Conventions		
Field	Type	Settings
		attachments to the current record. When populated with Bates numbers, the FindAttachments_v[version #].cpl locates the attachments. Or, this field may contain Bates numbers of any records that are attached to this document. Also used by the above noted CPL scripts.
DOCCOND	Paragraph	Holds notes about the document condition, like <i>Marginalia</i> .
PRIVCALL	Paragraph	Holds the reason a document or redacted sections are marked as privileged, like Attorney-Client, Priest-Penitent, Medical, etc.
MENTIONS	Paragraph	Keywords included in the document.
LOADDATE	Date	Alternative name for CREATEDATE field. Used to record the date the record was created, date data type.
AUDITTRAIL	Paragraph	Alternative name for EDITTRAIL field. Records the date, time zone, computer session ID, and user name any time a record is changed in Edit mode, and paragraph data type.
DISCSOURCE or SOURCE	Text	Used for entering the name of the disk the data is loaded from or physical media it is delivered on, includes disk number, case number, client number, name of person who loaded it, etc.
Administrative fields with different data types	Paragraph or Date	Consider creating ADMIN1PARA, ADMIN1TEXT, ADMIN1DATE, etc. to hold specific types of data.
Template for administrative fields	(not applicable)	Consider creating this template. Each time you make a new database, you can insert fields above them to accommodate data. To create a template: on the Documents menu, point to Export, and then click Structure. Locate and save the existing database structure in the Templates folder that is located in the same folder as the Concordance .EXE file.
REVIEWEDBY	Paragraph	Alternative name for REVIEWSTATUS.

Additional Administrative Fields and Alternative Naming Conventions		
Field	Type	Settings
		Name of the attorney who reviewed the file.
TAGSATPROD	Paragraph	Alternative name for PRODTAGS1. Tags as they existed for production.

Configure visibility of Empty fields

You can configure a database such that empty fields are not visible in the field listing. Empty fields are those that contain no values. Hiding unused fields can help to improve the readability of database records for end users. Showing empty fields is generally a preference for Concordance administrators, who typically want to have all database fields visible whether they contain data or not.

```

TITLE      : US/CANADA GOVERNMENT AFFAIRS
AUTHOR     : EES
COMPANY    : Enron
CREATOR    : Microsoft Office Word
METADATA   : Title = US/CANADA GOVERNMENT AFFAIRS
              Author = EES
              Template = Normal.dotm
              Last_author = gderneh
              Revision_number = 2
              Application name = Microsoft Office Word
              Last print date = 2000/7/7 11:7:0.0
              Creation date = 2000/7/7 11:11:0.0
              Last save time = 2000/7/7 11:11:0.0
              Total_editing_time = 1
              Number_of_pages = 3
              Number_of_words = 1816
              Number_of_characters = 10100
              Security = 4
              Company = Enron
              Number_of_bytes = 45056
              Number_of_lines = 189
              Number_of_paragraphs = 59
              Number_of_characters_(with_spaces) = 11935

FILEPATH   : C:\Concordance Native Viewer Training\Sample Data\Edocs\us-canadaupdates070700.doc
MODDATE    = 07/07/2000
CREATIONDATE = 07/07/2000
PRINTDATE  = 07/07/2000
TEXT01     :

              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

```

Database with empty fields hidden

```

TITLE      : US/CANADA GOVERNMENT AFFAIRS
SUBJECT    :
AUTHOR     : EES
COMPANY    : Enron
CATEGORY   :
KEYWORDS   :
PRODUCER   :
CREATOR    : Microsoft Office Word
COMMENTS   :
METADATA   : Title = US/CANADA GOVERNMENT AFFAIRS
              Author = EES
              Template = Normal.dotm
              Last_author = gderneh
              Revision_number = 2
              Application name = Microsoft Office Word
              Last print date = 2000/7/7 11:7:0.0
              Creation date = 2000/7/7 11:11:0.0
              Last save time = 2000/7/7 11:11:0.0
              Total_editing_time = 1
              Number_of_pages = 3
              Number_of_words = 1816
              Number_of_characters = 10100
              Security = 4
              Company = Enron
              Number_of_bytes = 45056
              Number_of_lines = 189
              Number_of_paragraphs = 59
              Number_of_characters_(with_spaces) = 11935

FILEPATH   : C:\Concordance_Native_Viewer_Training\Sample_Data\Edocs\us:canadaupdate070700.doc
DATE       = 00/00/0000
MODDATE    = 07/07/2000
CREATIONDATE = 07/07/2000
PRINTDATE  = 07/07/2000
TEXT01     :

```

US/CANADA GOVERNMENT AFFAIRS
UPDATE: June 1-July 7, 2000

Database with empty fields shown

By default empty fields are not visible. This means that when you create a new database but before you import data, no fields are visible since none of the fields contain any data. After you import data, any field that does not contain data will not be visible.

To show empty database fields:

1. Open the Concordance database you want to view.
2. From the **Tools** menu, click **Empties**. A check mark next to the Empties command indicates that empty fields are visible.

 If you have the option to view empties enabled, you may still see fields with no data on individual records. This situation occurs if data exists in that field for any other record in the case.

To hide empty database fields:

1. Open the Concordance database you want to view.
2. From the **Tools** menu, click **Empties** to remove the check mark next to the command and hide the empty fields from view.

About punctuation

When indexing a database, Concordance uses several rules to determine what is a word and what is not. One of the rules is that a word ends when it encounters any character that is not a number or a letter. For instance, the space character would indicate that one word is ending and another is beginning. Some characters, like the decimal point and the comma in numbers or

the slash in dates, do not indicate the end of a word. They are called embedded punctuation and are a part of the word.

The set of embedded punctuation recognized by Concordance during the indexing process is determined by what you enter in the Punctuation field. By default, Concordance recognizes the period (.), comma (,), forward slash (/), and the apostrophe ('). It does not include the hyphen. These characters are only considered part of a word if they are both preceded and followed by a letter or a number.

Changes to the punctuation list are kept with the database. Use any non-alphanumeric character except the space. For example, add @ if you want to search for e-mail addresses. Up to 10 punctuation characters can be entered. Changing the embedded punctuation in the Punctuation field does not update the dictionary. Index the database after modifying the Punctuation field to update the dictionary files.

Basic database fields

To help you plan and create your database fields, we have created a list of common Concordance database fields, including administrative fields:

Basic database fields

Basic Database Fields		
Field	Type	Length and Option Settings
BEGNO	Text	30, Key, Image
ENDNO	Text	30
DOCDATE	Date	Key, MM/DD/YYYY
DOCTYPE	Paragraph	Indexed
DOCTITLE	Paragraph	Indexed
AUTHOR	Paragraph	Indexed
RECIPIENT	Paragraph	Indexed
PAGES	Numeric	Length 20, Places 0, Plain Format, Key
TEXT01	Paragraph	Indexed
TEXT02	Paragraph	Indexed

 Basic administrative fields

Basic Administrative Fields		
Field	Type	Settings
ACCESSID	Numeric	20, 0, Accession, Use to track delete documents Generates a record load order number.
CREATEDATE	Date	Set properties using the Validation command on the Edit menu, normally not keyed or indexed
EDITTRAIL	Paragraph	Set properties using the Validation command on the Edit menu, includes YYYYMMDD, time, time zone, [session # -- assession #] per user
PRODBEG1	Text	Captures beginning Bates #s for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRODEND1	Text	Captures ending Bates #s for first production. Using number suffixes avoids having to rename fields later for additional productions.
PRODNOTES1, PRODNOTES2	Paragraph	Enter pertinent information here about the person who ordered the production, add this on every single record in a production set.
PRODDATE1	Date	Enter the production date here with global edit or AppendTextToField_v[version #].cpl.
PRODTAGS1	Paragraph	Used to capture tags as they existed at the time of production using the Tag To Field command, Tools > Manage Tags/Issues.
TAGS	Paragraph	Used to hold the names of checked tags generated by the Tag To Field command, Tools > Manage Tags/Issues.
TAGINFO	Paragraph	Used to hold activity generated by the Tag History&Store It_v[version #].cpl.
CUSTODIAN	Paragraph	Original owner of the data.
REVIEWSTATUS	Paragraph	Name of person who reviewed the file.
ATTYNOTES	Paragraph	Used to hold attorney notes.
ADMIN1, ADMIN2,	Paragraph	Extra fields to hold data generated later for any reason, make several of them.

Basic Administrative Fields		
Field	Type	Settings
ADMIN3, ADMIN4		When you make a new field, you must run a full index so these fields save valuable time. Make some paragraph and some for dates.

Reviewing load files

Load files or delimited text files typically have extensions ending in .dat, .csv, or .txt. Each file contains record metadata, but some may also include body text. We recommend having your OCR separated into individual text files and imported separately.

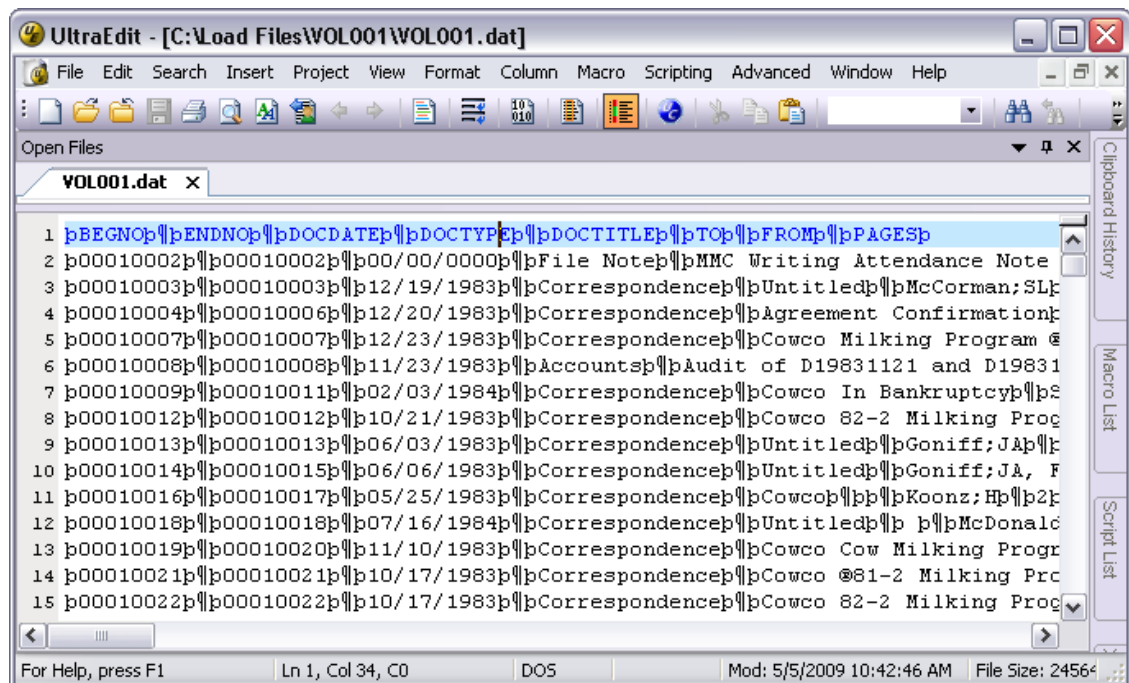
As an administrator, always make it a best practice to open and review delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

To review a load file:

1. Open the load file in any text editor program.

 Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad® or UltraEdit®.

Here is an example of a delimited text load file opened in UltraEdit:



2. Review the load file for the following elements:

- The file must be a text-based format with an extension of .dat, .csv, .txt, .rtf, or any normal text file extension.
- If there is not a header row containing field names, open the associated .tif file for the first record and match the data in the record to the data in the .tif file.
- Note the delimiters used in the file. Concordance can handle any standard text delimiters.
- Note the date format used in the file. Concordance can load dates containing slashes in any order with either 2- or 4-digit years, with a maximum of 8 digits. The only date formats Concordance can load without slashes is the universal date format of YYYYMMDD and the mm-dd-yyyy date format with dashes.
- Check the final line number for your last record to note the number of records expected to be added to the database. Subtract header row if the Skip first line option is checked during import.
- Is there a carriage return at the end of the record? If not, add a carriage return at the end of the record. Concordance will not load the last record if the carriage return at the end of the record is missing.

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

Creating a database with load files

When creating a database, Concordance uses a wizard type interface that walks you through each step of the database creation process. The New Database Creation Wizard for load files uses the header row of a delimited text file, an existing Concordance database structure, or a setting file that was saved from an existing database to create the fields and import the data. The database can be modified to fit your needs.

Keep the following in mind when using the wizard:

- The wizard is for creating new databases only. You cannot use the wizard to import data into an existing database. To import data into an existing database, see About importing files.
- Field names longer than 12 characters will be truncated automatically.
- All OCR text files must be located within the same directory.
- All image files must be located within the same directory. If you need to make any additional changes to the directory settings, see Editing the image directory path.
- Selecting a viewer and loading imagebase files is optional. However, if you do not create an imagebase, only multi-page OCR text files can be loaded. For example, if you have three OCR text files associated with a single database record, only the first file is loaded into the database.
- If the viewer and imagebase options are selected, single-page OCR text files are grouped together into a single database record and separated in the specified OCR field using page tags (i.e. ***00010002***).
- Only one OPT file can be loaded. If you have more than one OPT file, use the Imagebase Management tools. For Concordance Native Viewer, see Loading additional OPT files for CNV. For Concordance Image, see Loading image files for Concordance Image.
- Only TIF formatted files can be loaded for Concordance Image. To load other file types, see Loading image files for Concordance Image.

To create a new database using load files:

1. Review the load files you will be importing into the database, see Reviewing load files.
2. In Concordance, on the **File** menu, click **New**.
3. In the **New Database Wizard** dialog box, click the **Load Files** button.
4. **Define the database and structure:**
 1. For the **Enter Database Name** field, click the **Browse** button, navigate to where you want to save the database, type a file name for the database, and then click **Save**.
 2. In the **Select DAT file** field, click the **Browse** button, locate and select the .DAT file you want to load, and then click **Open**.

New Database Creation Wizard - Load Files

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

Enter Database Name

Select DAT File

Load Field Names From

- ☒ DAT File
- ☐ Template/Structure
- ☐ Settings File
- ☐ None (Enter Field Names Manually)

< Back Next > Cancel Help

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

3. In the **Load field names from** section, do one of the following:
 - Select **DAT File** to load the database field names from the DAT file header row you are importing. The field type settings are automatically set to Paragraph.
 - Select **Template/Structure** to import the field names and types from a template or existing database structure. In the **Load Database Structure** dialog box, click the **Browse** button to locate and select the template/database you want to load.
 - Select **Settings File** to import the fields names and field type settings from a specified Field Properties File (.TXT), click the Browse button to locate and select the Field Properties file.

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

Concordance requires that each field name be unique; therefore, if the imported settings file and/or DAT file contain duplicate fields, the duplicate field names will be appended with a suffix of 01 up to the maximum number of characters allowed for field length.

- Select None (Enter Field Names Manually) to manually enter the field names.

4. When finished, click **Next**.

5. **Specify the delimiter and date formats:**

The Format field defaults to Concordance default. If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Concordance default delimiters:

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

1. Specify the delimited characters format.
2. Select the date format that matches your delimited text file.
3. When finished, click **Next**.

6. Define the database field names and type properties:

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

1. In the Modify dialog box, review the **Field Name** list and modify the **Type** settings for each database field as needed.

Field names must begin with an alphabetic character. Only alphanumeric characters and the underscore character are allowed in the field name. The maximum number of characters for a field name is twelve.

The order the fields are listed, is the order the fields will appear in Concordance.

If you are creating database fields using an existing database template or structure, or a settings file, make sure that the database fields you are defining match the fields in the header row of the corresponding delimited text file you will be using to import the field data.

If you accidentally click the OK button or press ENTER while entering fields in the Modify dialog box, you will close the dialog box. To reopen it, click the Back button and then click the Next button.

Field Name	Type	Length
BEGNO	Paragraph	
ENDNO	Paragraph	
DOCDATE	Paragraph	
DOCTYPE	Paragraph	
DOCTITLE	Paragraph	
TO	Paragraph	
FROM	Paragraph	
PAGES	Paragraph	

Status

Documents: 0
Fields: 8

Punctuation: .,/

Name: BEGNO
Type: Paragraph
Length:
Places:
Format:

☐ Image ☐ Key ☐ Accession
☐ System ☒ Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

To create a text field:

1. In the **Type** field, click **Text**.
2. In the **Length** field, type the number of characters allowed in the field value.

Text fields can have from 1 to 60 characters. Fixed length text fields should be used for numeric values that are not used mathematically, such as telephone numbers, social security numbers, and other serial numbers.

Sorting is alphanumeric. The numbers 1 and 1000 sort before 9 and 999. Use zeros for any numeric values or serial numbers stored in text fields so that they sort correctly, 0009 before 1000.

The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

To create a numeric field:

1. In the **Type** field, click **Numeric**.

2. In the **Length** field, type the number of characters allowed in the field value.

Numeric fields can have up to 20 characters, including the decimal place. The number you type in the Length field defines the total length of the number including the decimal place and all digits following the decimal place.

The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

3. In the **Places** field, type the number of decimal places for the numeric field.

For example, the number 1234.56 would have a field length of seven and a places value of two.

Negative numbers use an extra place for the negative sign.

4. In the **Format** field, choose one of the following numeric field formats:

- **Plain**
- **Comma**
- **Currency**
- **Zero Filled**

The Format field determines how numeric fields are displayed and printed in Concordance.

To create a date field:

In the **Type** list, select the date format:

- Date MMDDYYYY (month-day-year)
- Date YYYYMMDD (year-month-day)
- Date DDMMYYYY (day-month-year)

The date field format you choose is the date format that is displayed in Concordance.

You need to use the date format selected in the Type field when searching for dates and entering dates during data entry.

Concordance sorts date fields correctly, regardless of the date format you choose in the Type field.

To create a paragraph field:

In the **Type** field, click **Paragraph**.

Paragraphs fields can have up to 12 million characters. Even though paragraph fields are variable in length, Concordance only sorts paragraph fields by the first 60 characters in the first line of text.

2. For each field, select the check boxes for the properties that apply.

Image (Media) check box

An image/media field is used to link Concordance with a viewer, such as Concordance Native Viewer, Concordance Image or Opticon. The Image check box needs to be selected for only one of the database's fields. It is best practice to select the Image check box for the BEGNO field or its equivalent.

Regardless of the image viewer you use, when you view a document associated with a record in Concordance, the corresponding media/image is displayed in the selected viewer. For more information, see *Defining preferences*.

Key check box

Selecting the Key check box makes the field a key field. Any field can be a key field, but most often fixed-length fields and date, numeric, and text fields that you need to search are designated as key fields. Key fields perform a function similar to indexing, but they do not require reindexing. When fields are designated as key fields, Concordance creates a database .key file, which is used in searching key fields.

Full-text paragraph fields are usually made into key fields for only one reason, which is to quickly locate empty paragraph fields.

For example, the search *author = ""*, where AUTHOR is full-text paragraph field, would normally perform slowly, but it will work quickly when the AUTHOR field is a key field. To locate records where this field is not empty use the search *author > ""*. Note that there are no spaces between the quotes.

So, why not make all fields key fields? The key field file takes up room. The more key fields your database has, the more room it will take up. Typically, full-text paragraph fields are not searched using comparison operators. Making full-text paragraph fields key fields is of marginal benefit and adds administrative overhead to the database management system. Also, if you have fixed-length fields that you do not need to search, it is best practice not to designate those fields as key fields.

Accession check box

Accession numbers are unique serial numbers internally assigned to each record in Concordance version 6.x or later databases. Accession numbers are stored with each record and are managed entirely by the database software. They stay with the document as long as the document stays in the database, even if other records are deleted around it. Accession numbers cannot be edited or modified in any way, but they can be viewed.

The Accession check box only needs to be selected for one of the database's fields. To create accession numbers, create an accession field by adding a numeric field to your database and selecting the Accession check box. It is best practice to select the Accession check box for the ACCESSID field or its equivalent. The internal accession number for each record will be displayed in the accession field you create.

System check box

System fields are created by Concordance. Concordance automatically selects the System check box for system fields, which are hidden fields with no read or write end-user privileges. System fields are used for internal system administration features such as replication. Under normal circumstances, system fields should never be indexed, added, deleted or modified by users.

 Indexed check box

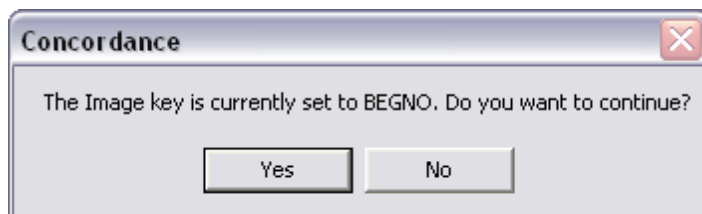
A field must be indexed to use Concordance's full-text search capabilities. Indexing places every word in the field into a dictionary for fast retrieval. Concordance automatically selects the Indexed check box when you create a paragraph field. You need to manually select the Indexed check box if you want to index other field types.

You can change the Indexed check box setting at any time, however changing the setting will not update the dictionary. Index the database after modifying the Indexed check box setting to update the dictionary files.

3. To add additional fields to the database, click the **New** button and define the field name and type settings.
4. To remove fields from the database, select the field you want to delete, and then click the **Delete** button.
5. Review the punctuation in the **Punctuation** field and add any other punctuation that is integral to your searches, such **;-@**.

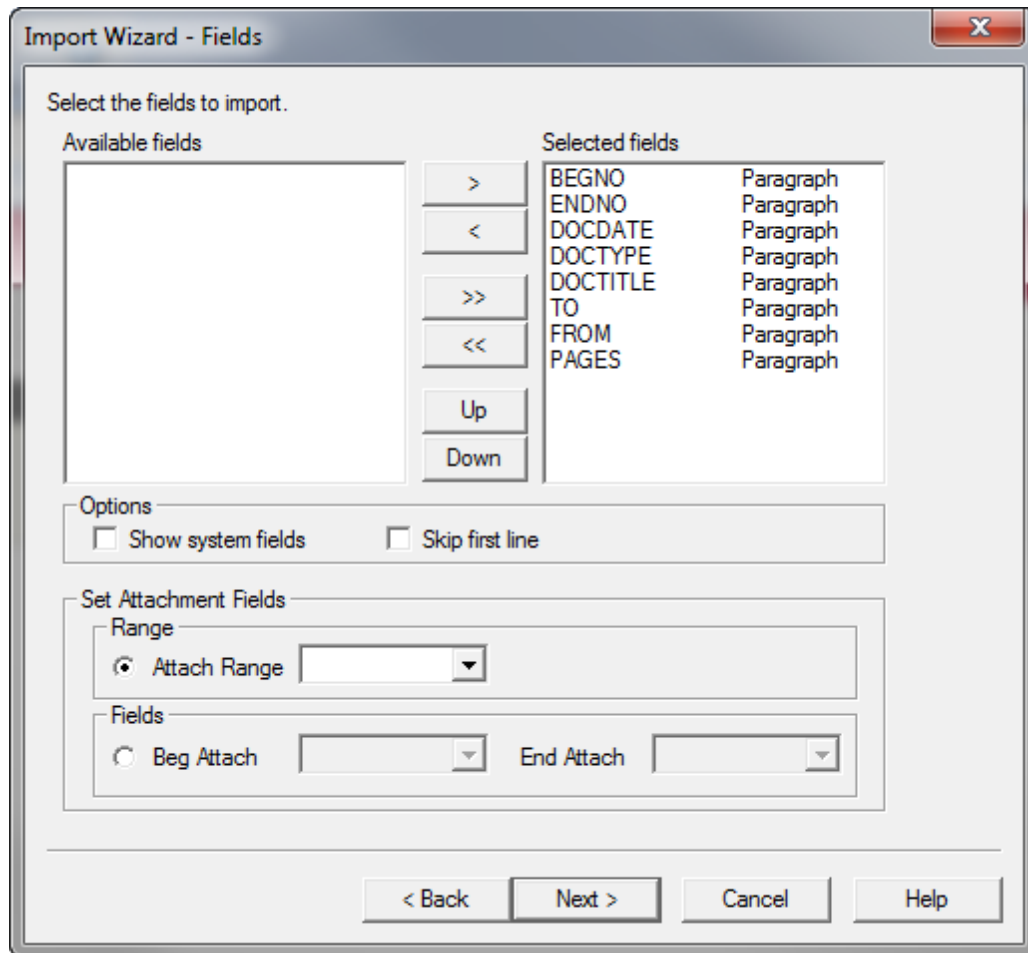
The Punctuation field defaults to the following punctuation: '.,/. The punctuation list is used in full-text searching, see About Punctuation.

6. When finished, click **OK**.
7. When prompted to verify the Image key field, do one of the following:
 - Click **Yes** to accept the field shown in the dialog box.
 - Click **No** to open the Modify dialog box and select a new field.



7. **Select database fields:**

By default, all of the database fields are added to the Selected fields list for the import. In the Fields dialog box, you can also set up the fields associated with document attachments (Optional). The attachment fields can be set up or changed any time after the database is created. For more information, see Defining preferences.



1. To only select some of the fields for the import, click the double arrow (<<) button to move all the fields to the **Available fields** list.
2. In the **Available fields** list, select the fields you want to include in the import, and click the right arrow (>) button to add the fields to the **Selected fields** list.
3. Once you have added the applicable fields to the **Selected fields** list, use the **Up** and **Down** buttons to make the field order match the field order of your delimited text file.

The field order in the Selected fields list, must match the field order of your delimited text file. If you created the database fields using a DAT file and haven't made any modifications to the field names, the fields are listed in the same order in which they appear in the DAT file. However, it is recommended to open the DAT file to verify the fields are correct.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance

properly.

4. To display hidden system fields, select the **Show system fields** check box.

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

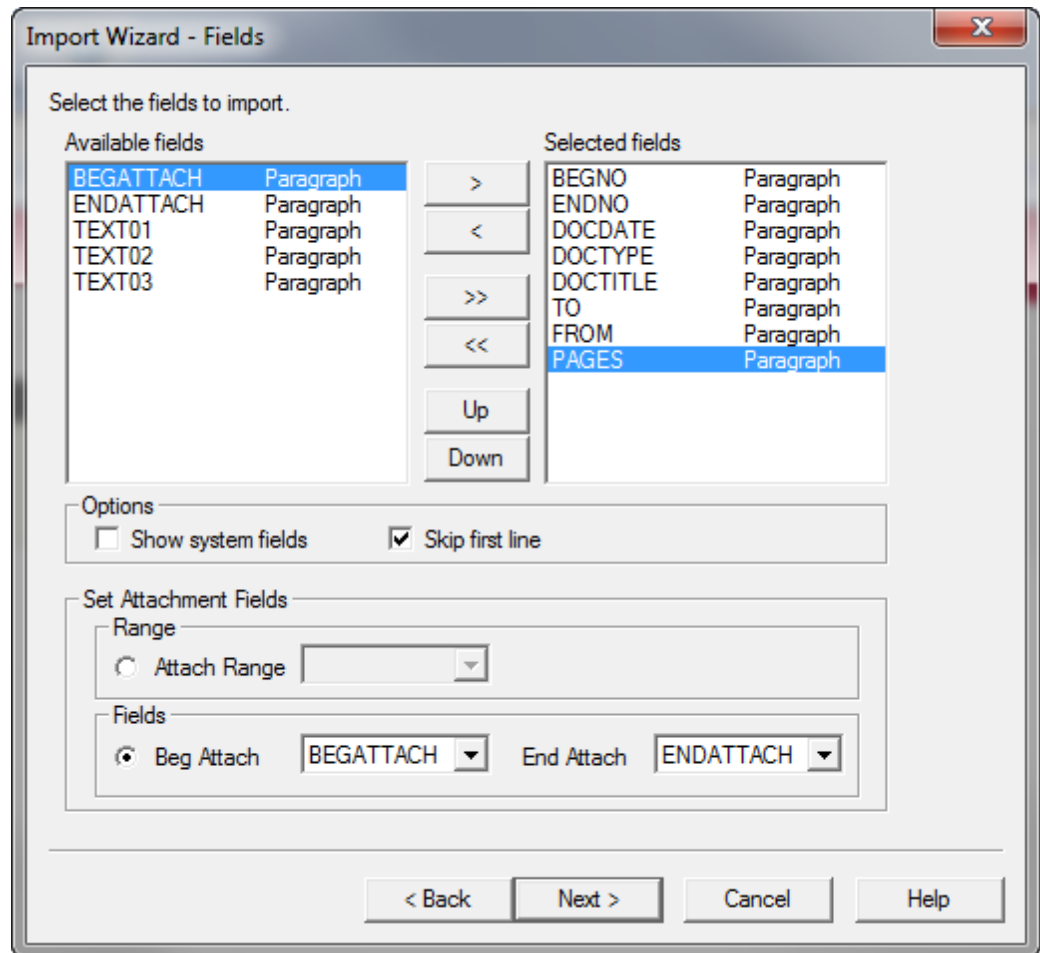
5. To prevent Concordance from creating a record for your field name row, select the **Skip first line** check box.

The first line of a data file sometimes contains the field names used in creating the database, with each field name taking the place of the data for that record. When you select the Skip first line check box, Concordance ignores that line of data during the import.

6. To setup the attachment fields, in the **Set Attachment Fields** section, do any of the following:
 - To set a field to a range of attachments, select the **Attach Range** option, and then select the field to store the attachment range data.
 - To set up the beginning and ending attachment fields, select the **Fields** option, and then from the Beg Attach and End Attach lists select the beginning attachment number and ending attachment number fields.

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

7. When finished, click **Next**.



8. Import OCR text and tag lists:

1. In the **Load OCR Text** section, click the **Browse** button.
2. In the **Browse for Folder** dialog box, locate and select the OCR directory containing the OCR text files, and then click **OK**.

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

3. From the **OCR field** list, select the OCR field you want to write the OCR text.

By default, the wizard automatically populates the OCR field list with all fields that are set up as Paragraph type fields. In order for Concordance to properly load the OCR data, make sure that you have setup the appropriate OCR fields and have them numbered sequentially.

4. (Optional) To load a list of Tags from a text file, in the **Load Tag List** section, click the **Browse** button.

Tags and tag folders do not support Unicode characters. Only ASCII (values 032-

126) characters are allowed. If a tag name or tag folder name contains an invalid character, you are prompted to make corrections. For more information about creating a Tag list, see Importing and Exporting Tags.

5. In the **Open** dialog box, locate the Tag file (.txt) you want to load, and then click **Open**.

Load OCR Text/Tag List

Load OCR Text

Click the Browse button to locate and load the OCR text.

C:\CN_Databases\VOL001\OCR Browse...

Select the OCR field. The OCR text automatically overflows the text into the next available field.

OCR field TEXT01

Load Tag List

Click the Browse button to locate and select the Tag list text file to import.

C:\Tags\Database_Tags.txt Browse...

< Back Next > Cancel Help

6. When finished, click **Next**.

9. **Setup the imagebase:**

1. In the **Select Imagebase default viewer** section, select the default viewer for the database records.

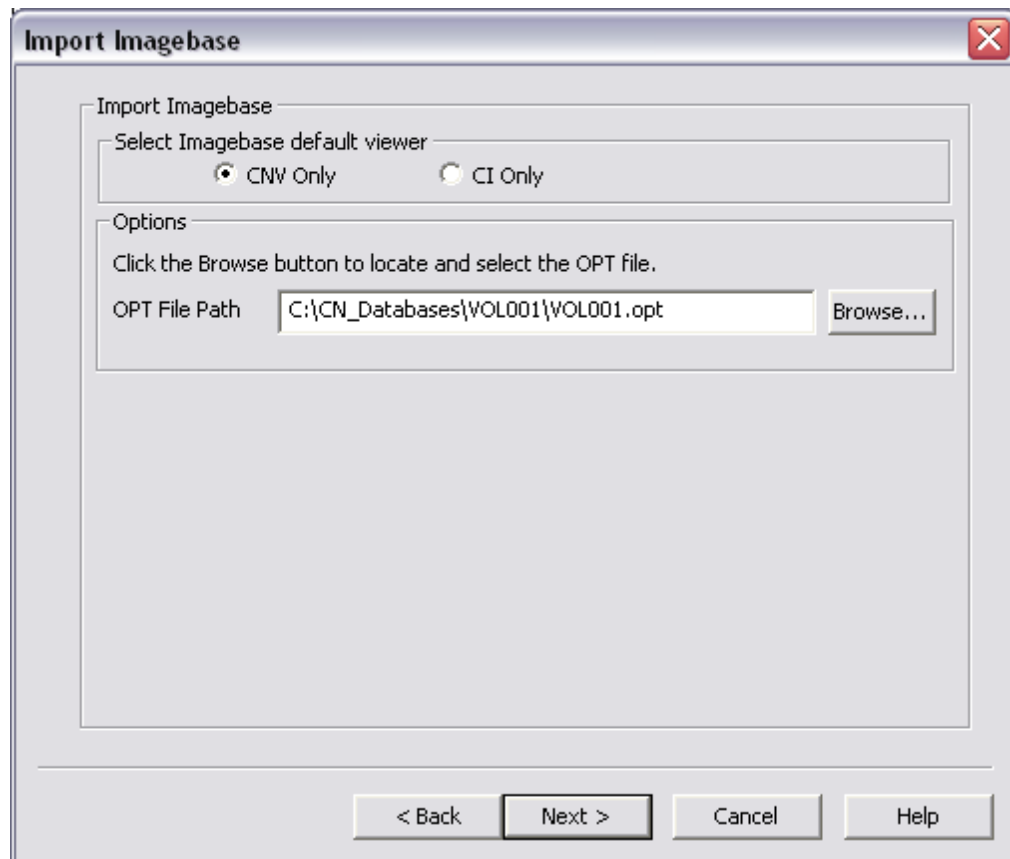
Depending on the viewer selection, the Options settings will change accordingly.

2. Do one of the following, and then click **Next**:

 To set the options for Concordance Native Viewer:

In the **Options** section, click the **Browse** button, locate and select the corresponding

OPT file for the imagebase.



 To set the options for Concordance Image:

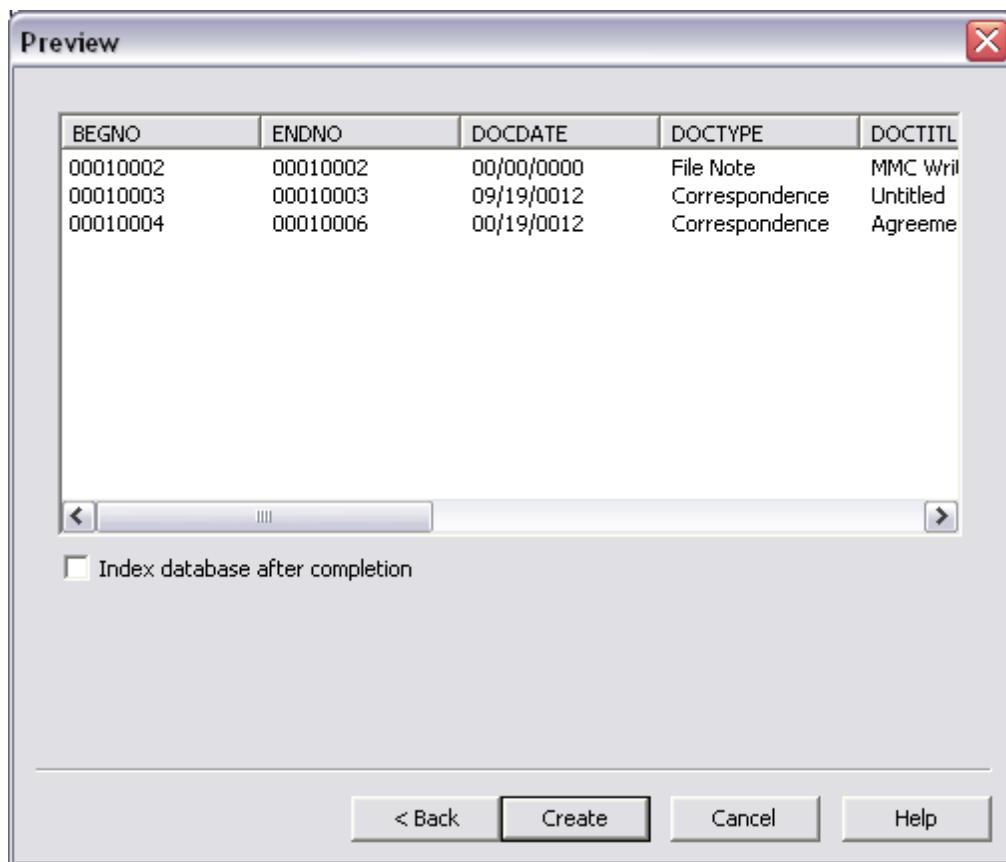
Do one of the following, and then click **Next**:

- To scan the images from a directory, select the Scan Images option, click the **Browse** button, navigate to the directory for the image files, and then click **Open**.
- To load an opt file, select the Load OPT option, click the **Browse** button, locate and select the corresponding OPT file for the imagebase.

When importing the image files using the Scan Images option, make sure that all the image files are located in the same directory. Once the imagebase is created, you can make changes in Concordance Image using the Imagebase Management features.

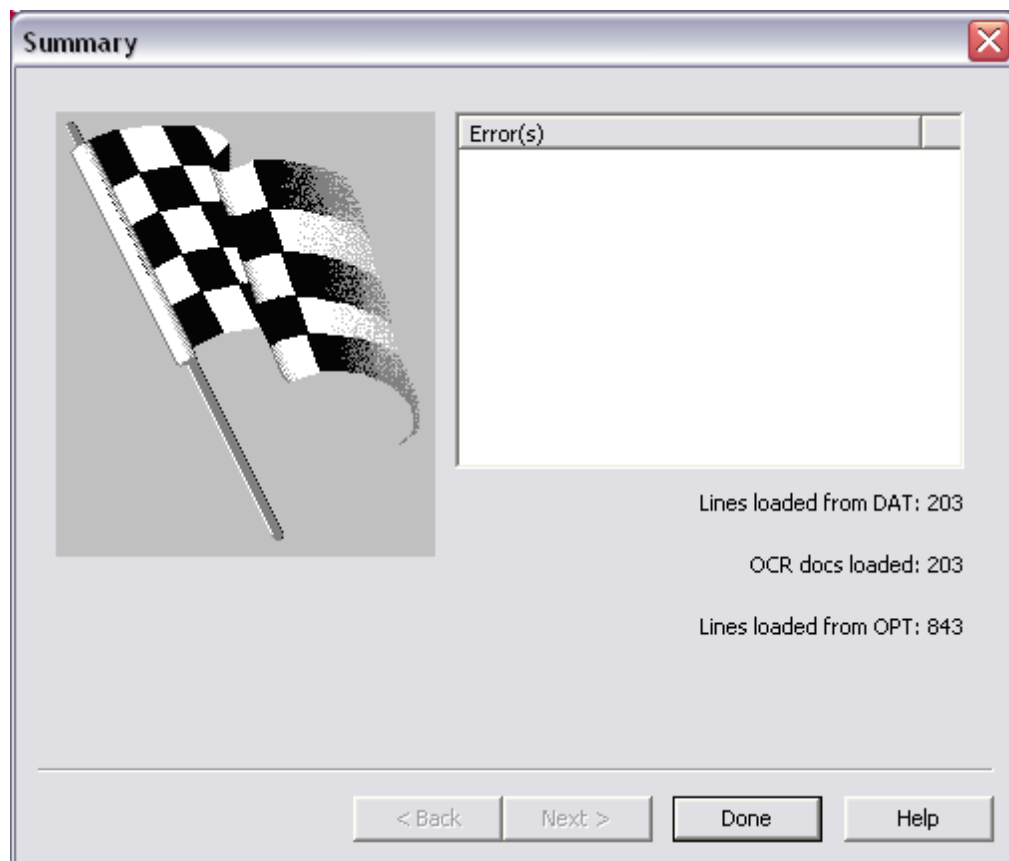
10. In the **Preview** dialog box, do the following and then click **Next**.

- The Preview dialog box displays the fields you specified, system fields, and any data associated with the first three records. You'll want to make sure that the fields contain the proper data. If not, you can navigate back through the wizard and make any necessary changes prior to creating the database.



- (Optional) Select the **Index database after completion** checkbox, to automatically index the new database after it is created.

11. In the **Summary** dialog box, click **Create** to create the database and load the data file.
12. When finished, review any error information in the **Errors** section, and then click **Done**.



13. Review the Concordance records to ensure the data and imagebase loaded correctly.

Related Topics

- About fields
- Creating an EDoc database
- Creating an Email database
- Using a database template

Creating an E-documents database

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

(Concordance version 10.21) When creating a database, Concordance automatically processes

and normalizes the documents during import. The Concordance E-documents engine OCRs all the native files (e-documents) and generates a .PDF near-native version of the document for viewing in Concordance Native Viewer. The PDF near-native files are stored in the database folder in a separate Near Natives folder and a copy of the native file is stored in a Natives folder. Documents are imported alpha-numerically. The Temp folder contains the .txt formatted files for the OCR text that was extracted from the document and is cleared when the import process is complete.

Name	Date modified	Type	Size
logs	12/3/2014 1:10 PM	File folder	
Natives	12/3/2014 1:10 PM	File folder	
NearNatives	12/3/2014 1:10 PM	File folder	
Temp	12/3/2014 1:10 PM	File folder	
DB1.CIB	12/3/2014 1:10 PM	CIB File	37 KB
DB1.DCB	12/5/2014 2:28 PM	Concordance Dat...	19 KB
Db1.Dct	12/5/2014 2:28 PM	Adobe Illustrator S...	248 KB
Db1.Editlayout	12/3/2014 1:06 PM	EDITLAYOUT File	4 KB
Db1.Fzy	12/5/2014 2:28 PM	FZY File	308 KB
DB1.IDB	12/3/2014 1:10 PM	IDB File	23 KB
DB1.Ini	12/5/2014 2:28 PM	Configuration sett...	1 KB
Db1.Ivt	12/5/2014 2:28 PM	IVT File	643 KB
DB1.Key	12/3/2014 1:10 PM	Keynote document	10 KB
Db1.Layout	12/3/2014 1:09 PM	LAYOUT File	4 KB
Db1.Ndx	12/5/2014 2:28 PM	NDX File	2 KB
Db1.Sortlayout	12/3/2014 1:06 PM	SORTLAYOUT File	4 KB
Db1.Tex	12/3/2014 1:10 PM	TEX File	397 KB
DB1.TRK	12/5/2014 2:09 PM	TRK File	21 KB
DB1_Persistent.txt	12/3/2014 1:06 PM	Text Document	0 KB
Db1-Notes.Dcb	12/5/2014 2:28 PM	Concordance Dat...	19 KB
Db1-Notes.Dct	12/5/2014 2:28 PM	Adobe Illustrator S...	4 KB

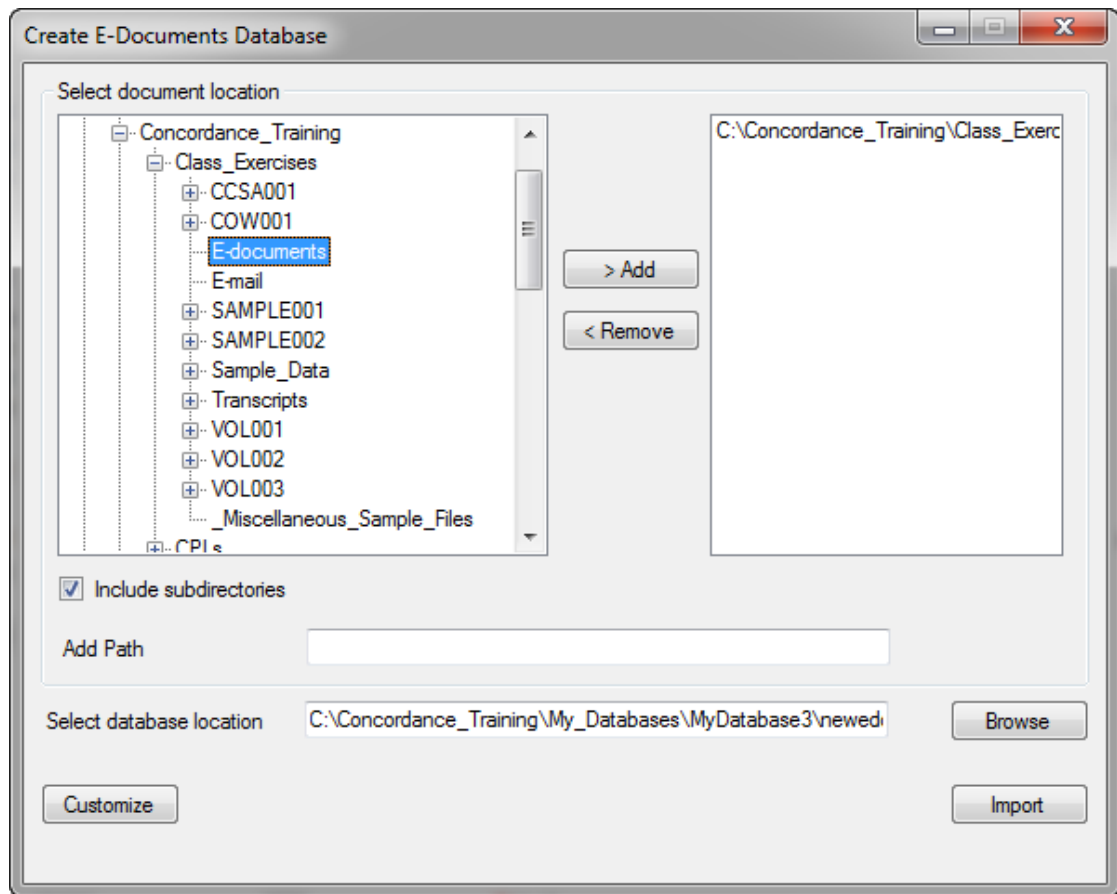
Concordance v10.21 database folder structure

- ✎ The new E-Documents import wizard is only compatible with the full installed version of Concordance version 10.21. This feature is not available for a Concordance Workstation installation.

To create an E-documents database (Concordance v10.21):

1. On the **File** menu, click **New**.
2. In the **New Database Creation Wizard** dialog box, click the **E-documents** button.

The Create E-Documents Database dialog box is displayed.

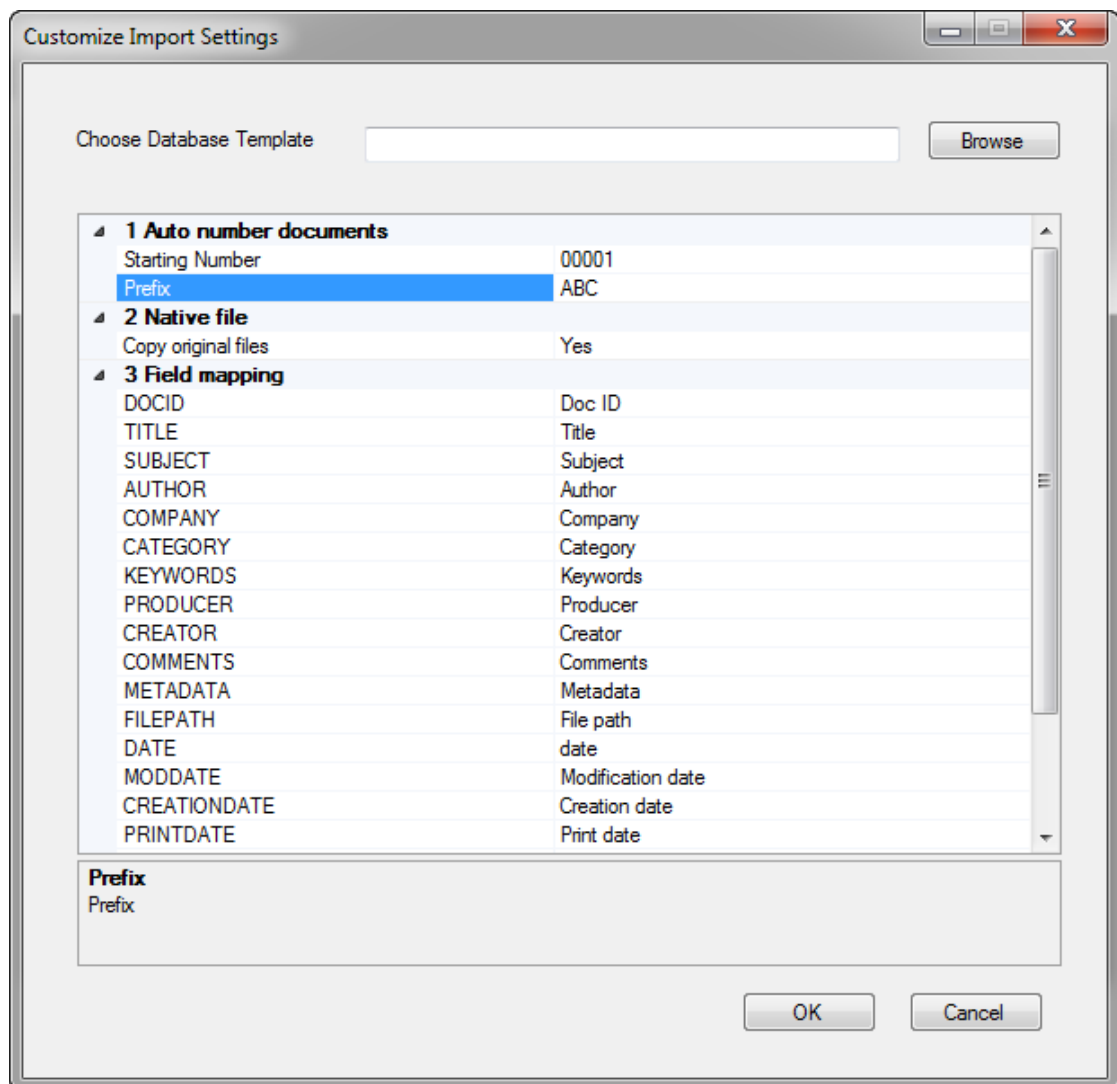


3. In the **Select document location** section, do one of the following:
 - In the folder list, expand the folders to browse to the location where the documents are located to import, click the folder name, and then click the **Add** button.
 - In the **Add Path** field, type the path to the location of the files you want to import, and then click the **Add** button.
4. Repeat step three for each set of documents you want to import into the database.
5. To include files from any subdirectories within the folder, select the **Include subdirectories** check box.
6. For the **Select database location** field, click the **Browse** button, navigate to the location to save the database, type a file name for the database, and then click **Open**.
7. To customize the import settings, click the **Customize** button, do any of the following, and then click **OK**:
 - To use an existing database template, click the **Browse** button, and locate the database template to use, and then click **Open**.
 - In the **Auto number documents** section, enter a starting number and prefix for numbering the documents.
 - In the **Native file** section, specify whether to copy the original native files and store the copies in the Native Files folder with the database.
 - In the **Field mapping** section, to change the mapping for the imported data

(document metadata) to the Concordance fields, select the field and then select the imported data type from the corresponding list.

When importing E-Documents, Concordance captures metadata when possible, including the document ID, author, creation date, and last modified date. Concordance also captures the metadata present in formatting such as font changes, bolding, underlining and highlighting. Each of the fields in the Field mapping section are automatically set to the default Concordance field mappings.

⚠ To make sure that the documents import properly, the Document Text field must be set to an OCR paragraph field with an alpha prefix and numeric suffix, such as TEXT01.

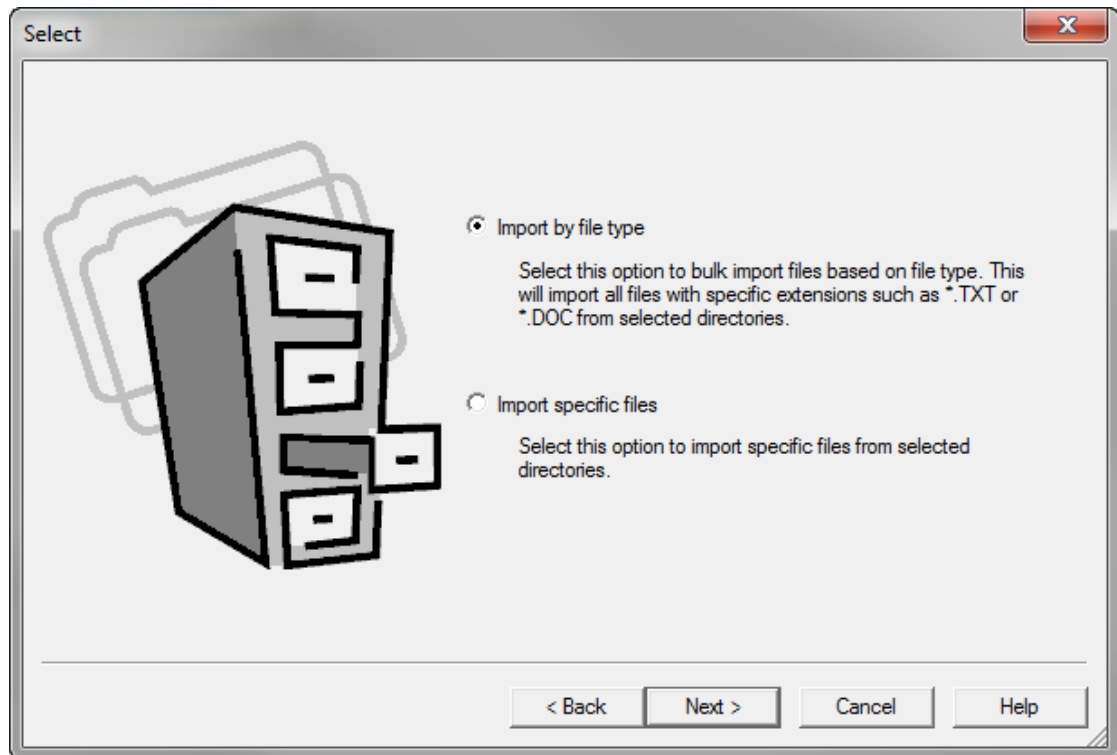


- When finished, click **Import**.

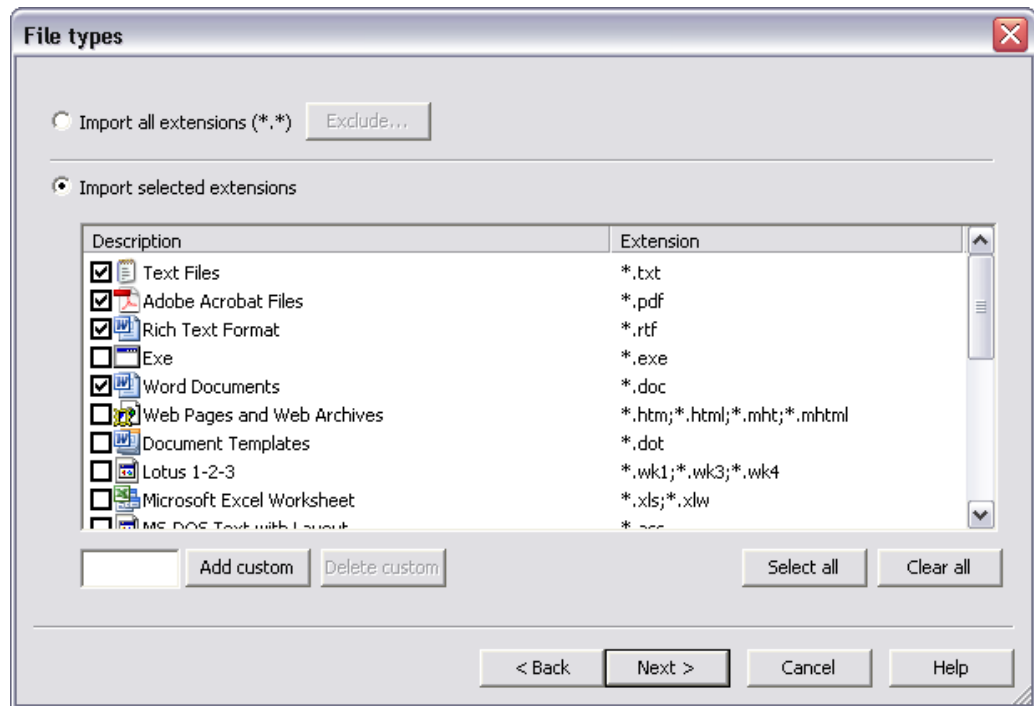
After the import is complete, it is recommended that you review the import log to verify document import success and failure messages.

📖 [To create an eDocuments database \(Concordance v10.20 or earlier\):](#)

1. On the **File** menu, click **New**.
2. In the **New Database Creation Wizard** dialog box, click the **E-documents** button.
3. For the **Enter Database Name** field, click the **Browse** button, navigate to where you want to save the database, type a file name for the database, and then click **Save**.
4. When finished, click **Next**.
5. In the **Select** dialog box, do one of the following, and then click **Next**:



- Select e-documents for import by file type:



1. In the File types dialog box, do one of the following:

- To import all file types, select **Import all extensions**.

To exclude file extensions:

1. Click the **Exclude** button to open the **Exclude extensions** dialog box.

The extension list contains the file extensions that are currently excluded.

2. To add a file extension to the list, type the file extension in the field below the file extension list and click the **Insert** button.

Be sure to add a file extension using the same format that appears in the list. For example, to exclude all files that end in .pal, type *.PAL. The file extension list is a list file called ImportExclusions.lst and can be found in the same directory as the Concordance_[version number].exe file.

3. To delete a file extension from the list, click the file extension and click the **Delete** button.
4. When finished, click **Done**.

- To import specific file types, select **Import selected extensions**.

To specify which file types are imported:

1. Select the check boxes next to the file types you want to import.

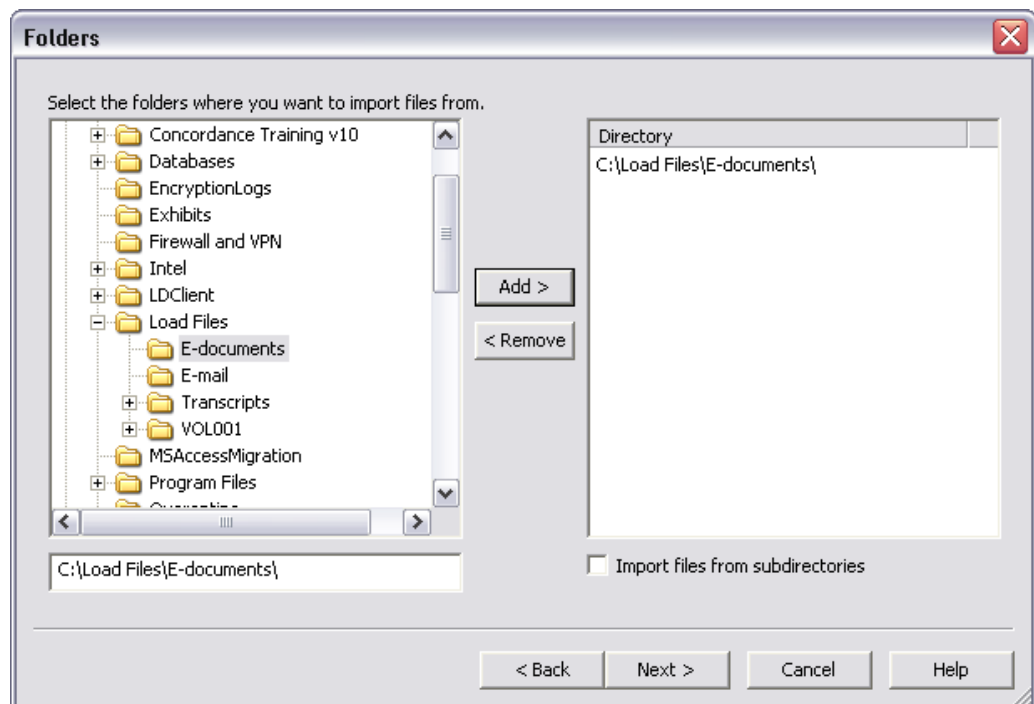
If the check box next to a file type is selected, Concordance imports this file type; otherwise, Concordance ignores it.

1. Clear the check boxes next to the files types you do not want to include in the import.

If there is a file type extension you want to import that is not in the file type list, you can add the file type extension to the list. Be sure to add a file extension using the same format that appears in the list. For example, to import all files that end in .pal, type *pal*.

2. To add a file type extension to the file type list, type the file extension in the field next to the **Add custom** button and click the **Add custom** button.
3. To delete a custom file extension, in the file type list click the file extension, and click the **Delete custom** button.

2. Click **Next** to open the **Folders** dialog box.



3. In the folder list, do one of the following to add the the path to the **Directory** list:
 - Browse to the folders containing the e-documents you want to import into the database, click the folder name, and then click the **Add** button.
 - Under the folder list in the blank field, type the path to the folders you want to import, and then click the **Add** button.
 - Drag folders from the folder list to the **Directory** list.
4. To include the files from the folder subdirectories, select the **Import files from**

subdirectories check box.

5. When finished, click **Next**.

 Select Import specific files:

1. In the folder list, browse to and click the folders containing the e-documents you want to import.

The files and folders in the selected folder are displayed in the file list to the right of the folder list.

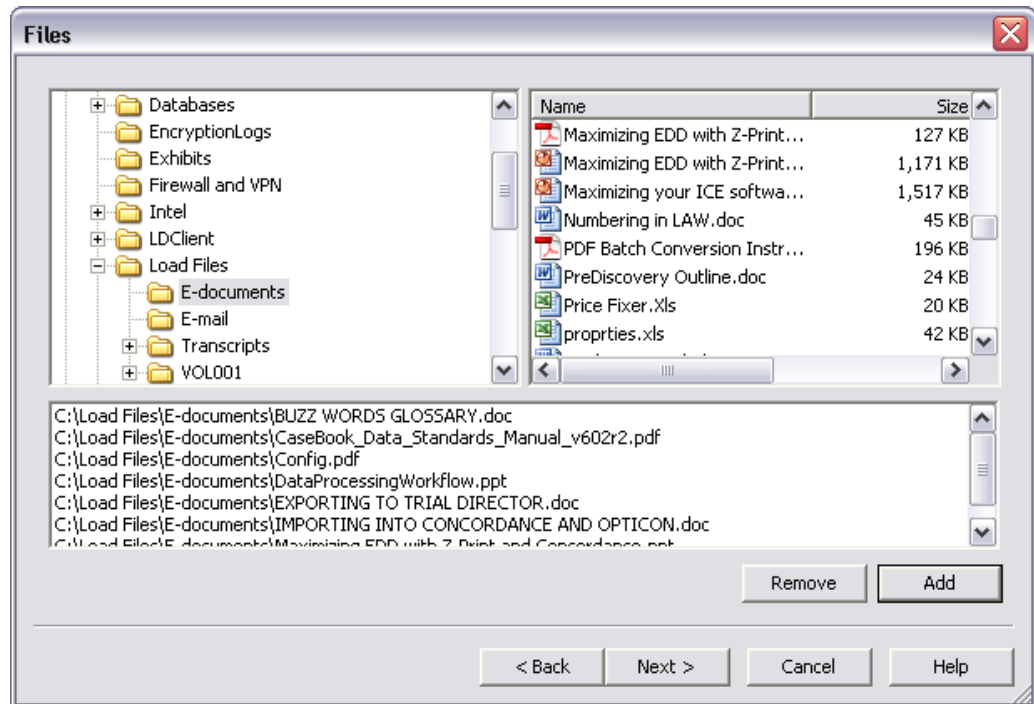
2. Click the files you want to import and click the **Add** button.

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

Clicking the Add button adds the file name and full file path to the import list.

If you need to remove a file from the import list, click the file name and path in the import list and click the Remove button.

3. When finished, click **Next**.



6. In the **Fields** dialog box, to change a field mapping, select a different Concordance field from the corresponding list, when finished click **Next**.

When importing E-Documents, Concordance captures metadata when possible, including the document ID, author, creation date, and last modified date. Concordance also captures the metadata present in formatting such as font changes, bolding, underlining and highlighting. Each of the fields in the Fields dialog box are automatically set to the default Concordance field mappings.

Fields

Select the field mapping for your database.

Title	TITLE	Comments	COMMENTS
Subject	SUBJECT	Metadata	METADATA
Author	AUTHOR	Date	DATE
Company	COMPANY	Creation date	CREATIONDATE
Category	CATEGORY	Modification date	MODDATE
Keywords	KEYWORDS	Print date	PRINTDATE
Producer	PRODUCER	Document text	TEXT01
Creator	CREATOR	File path	FILEPATH
Doc ID	DOCID		

< Back Next > Cancel Help

⚠ To make sure that the documents import properly, the Document Text field must be set to an OCR paragraph field with an alpha prefix and numeric suffix, such as TEXT01.

7. To add a new mapping field in the Fields dialog box, click the arrow next to the field you want to add the mapping field, and select <new>.
8. In **New** dialog box, specify the field properties, and then click **OK**. For more information about field properties, see About fields.
9. In the **Options** dialog box, specify any of the following:

Options

☒ Match metadata field names ☒ Create hyperlinks to original document

☐ Store file name without full path ☒ View e-Docs in Concordance Native Viewer

☐ Auto Number documents with DOCID (document ID)

Prefix: Starting Number (zero-filled):

The DOCID is the image key (unique identifier) for a document. If the Prefix and Starting number are not specified, Concordance will automatically create one for each document. The starting number cannot be longer than 9 digits.

Log file:

If you specify a file name, any messages produced during import will be copied to a plain text file.

Plain text files only

Record divider: ☐ Divider is anchored

< Back Next > Cancel Help

- To match a document's user-defined metadata fields with the Concordance database's fields, select the **Match metadata field names** check box.
- To create a hyperlink back to the original file, select the **Create hyperlinks to original document** check box.

When the Match metadata field names check box is selected Concordance will do its best to determine where an imported document's metadata is stored in the document.

When a user clicks the file name in Concordance, Concordance opens the original file. By default, Concordance stores the file name and its full file path.

- To only store the file name without storing the full path to the file, select the **Store file name without full path** check box.
- To create the CIB file for viewing the documents in Concordance Native Viewer, select the **View e-Docs in Concordance Native Viewer** checkbox.
- To auto number the imported e-docs, select the **Auto-number documents with a DOCID (documentID)** check box, and then enter the **Prefix** and **Starting number (zero-filled)**.

Concordance can create a .log file of imported files, including whether the import was successful. This log file is useful if an audit trail is required.

Auto-numbering your documents when importing eDocuments assigns the prefix and starting number to each document. If the option is selected and the Prefix and Starting number are not specified, Concordance automatically creates one for each document.

8. To create a .log file, click the **Browse** button, browse to where you want to store the log file, type the log file name in the **File name** field, and then click **Save**.

9. To recognize document breaks in an imported text file, in the **Record divider** field, type the character(s) used in the text file to indicate a divider.

Concordance uses the divider to recognize document breaks within the imported file and creates a new record in the database every time the document divider is encountered. The divider can be any group of characters that you wish to use. For instance, if you decide to use three asterisks *** to mark document breaks, then every time Concordance encounters three asterisks in the imported file it will stop reading, save what it has loaded, and continue reading the remainder of the file as a new record. This features works only with plain text files, it does not work with rich text files or other word processing formats.

By default, the divider must appear in the file flush against the left margin. Any text on the same line as the divider is stored in the file. If no text follows the divider, the remainder of the blank line is ignored.

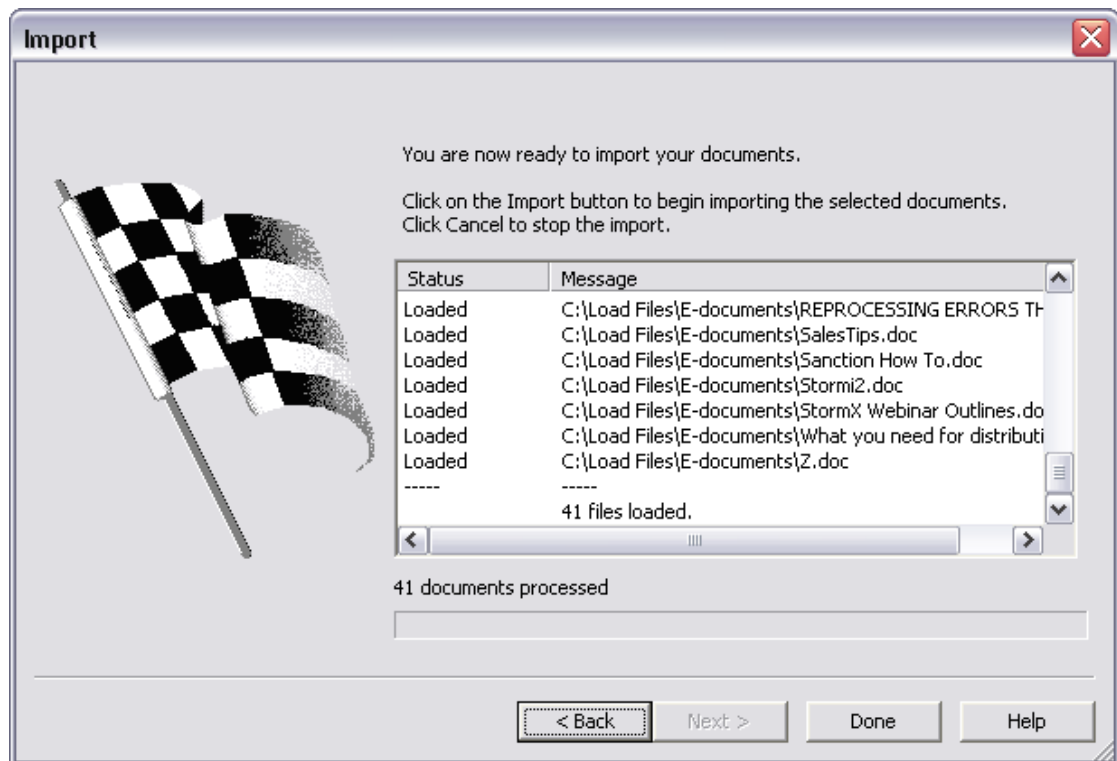
Free floating document dividers are most often encountered when the divider was stamped on documents that were optically scanned. The stamp can appear almost anywhere between the margins. When left justified dividers are not selected, any text that precedes the marker on the same line is ignored.

-  When viewing a divided text file in Concordance Native Viewer (CNV), the entire native document is displayed when opened from the first associated record only, regardless of any divider characters. No view is available for the remaining Concordance records for the text file. For example, a text file contains two separators in the file creating three separate records in Concordance. When CNV is opened to view the file, the first record displays the native file in its entirety. If you navigate to the second or third record, no native view is available for those records.

10. If the document divider is flush left, select the **Divider is anchored** check box.

When the Divider is anchored check box is not selected, Concordance looks for the divider text in each line it reads, from the left margin to the right margin.

11. Click **Next** to open the **Import** dialog box.



12. Click the **Import** button.

13. After your e-documents finish loading, click the **Done** button.

Creating an Email and Attachments database

When creating an Email and Attachments database, Concordance uses the New Database Creation Wizard to walk you through each step of the database creation process. Using the wizard, Concordance imports .pst formatted files that are associated with a Microsoft Outlook profile on your machine. You need to have Outlook or Microsoft Exchange Server installed with a mail profile set up for each custodian, so you can associate each .pst file to an Outlook profile. This should be done before using the Import e-mail wizard in Concordance.

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

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

- **Concordance Native Viewer** - the View e-mails in Concordance Native Viewer option must be selected in the Import e-mail - Attachments dialog box to ensure the Concordance Imagebase (CIB) file is created (for new records only). For more information, see About viewing native files.

- **Concordance Image** - e-mails need to be processed into images with a corresponding .dat and image load file. For more information, see Using Concordance Image with Concordance.

💡 If you need to export your e-mail from Concordance back to a .pst file, then consider using Discover the Wave's Trident Pro software.

- ✍ Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance. For more information, please see the Microsoft website.

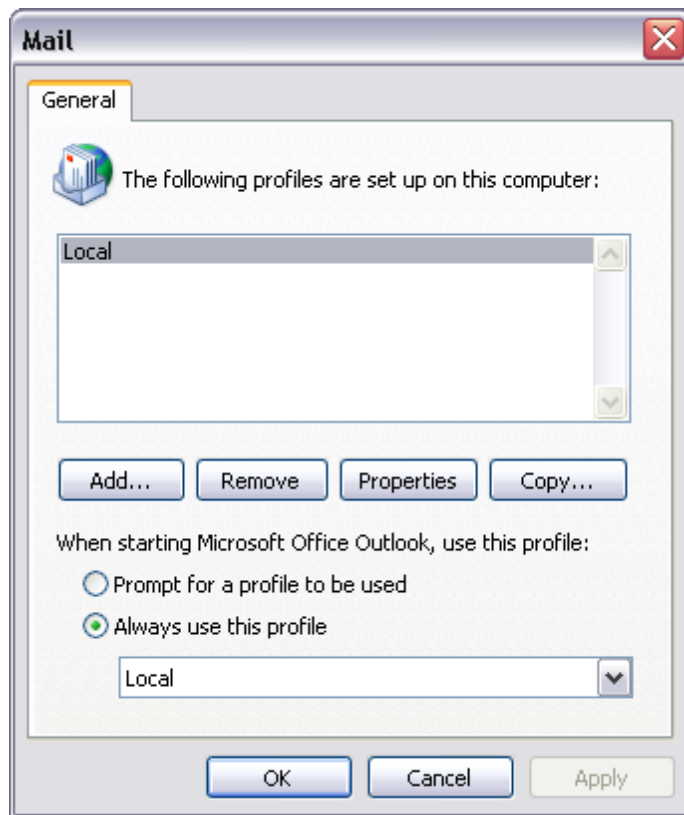
📁 To set up a mail profile:

The first step in importing e-mail and attachments is to set up a mail profile for the people in your e-mail records.

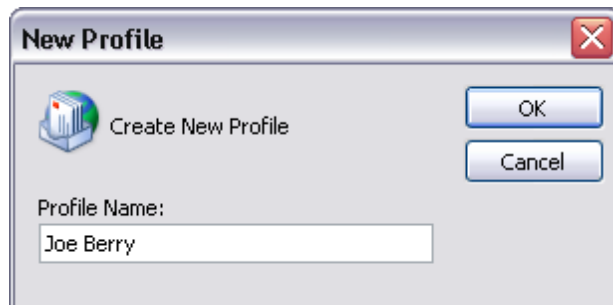
1. From the **Start** menu, click **Control Panel**, and then double-click **Mail**.
2. In the **Mail Setup - Outlook** dialog box, click the **Show Profiles** button.



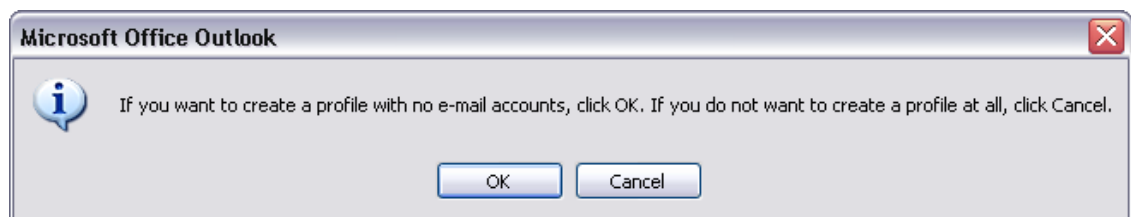
3. In the **Mail** dialog box, click the **Add** button.



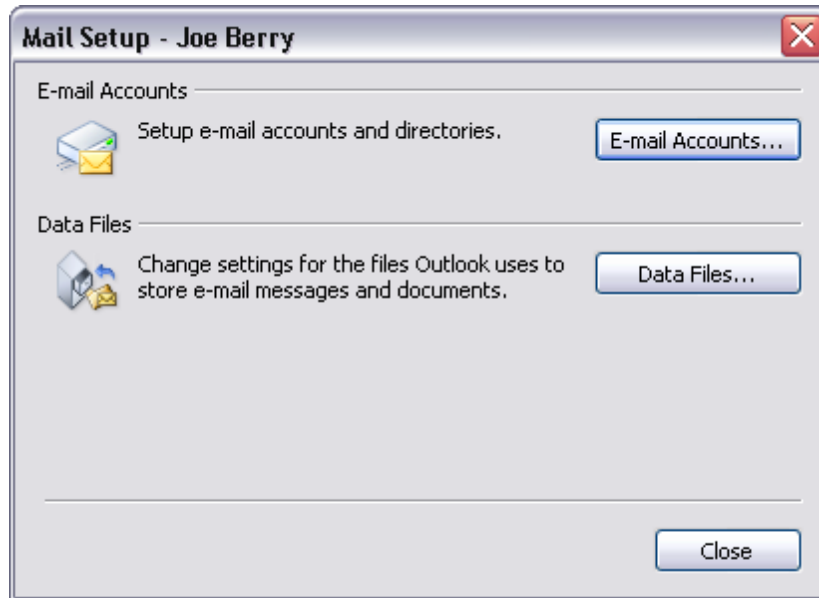
4. In the **New Profile** dialog box, for the **Profile Name** field, type the name of a person in the e-mail records, and then click **OK**.



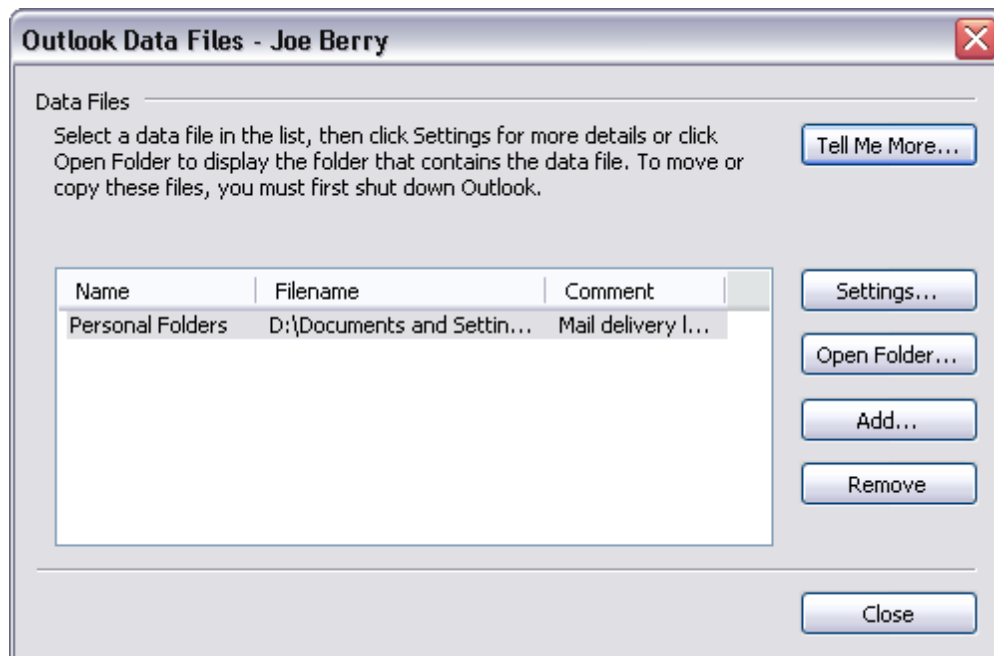
5. In the **E-mail Accounts** dialog box, click the **Close** button.
6. When prompted, click **OK** to create a profile with no e-mail account and return to the **Mail** dialog box.



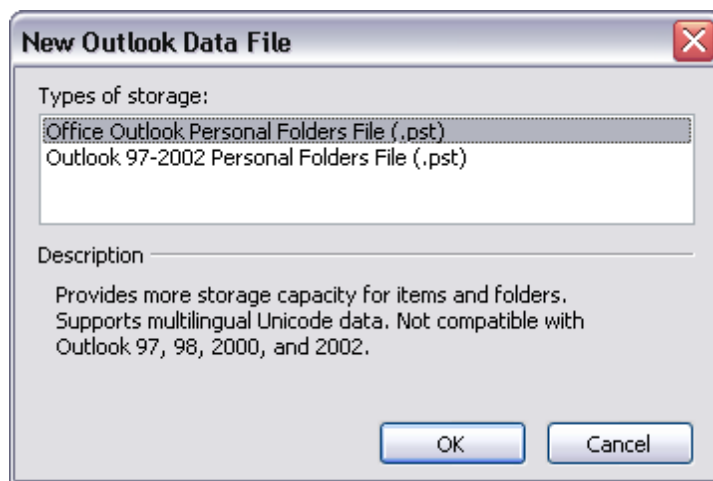
7. Verify that the profile you created is selected, and then click the **Properties** button.
8. In the **Mail Setup - [profile name]** dialog box, click the **Data files** button.



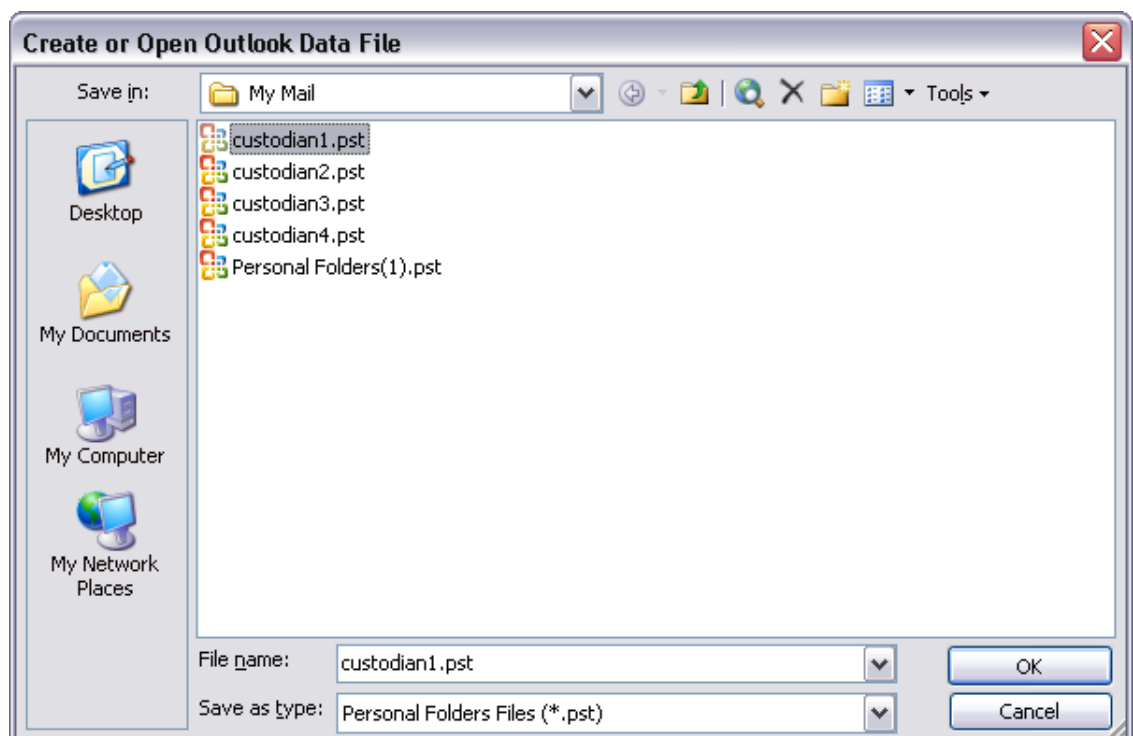
9. In the **Outlook Data File - [profile name]** dialog box, click the **Add** button.



10. In the **New Outlook Data File** dialog box, click the compatible .pst file type, and then click **OK**.



11. In the **Create or Open Outlook Data File** dialog box, browse to and click the .pst file associated with the profile you created, and then click **OK**.



12. In the **Personal Folders** dialog box, click **OK**.

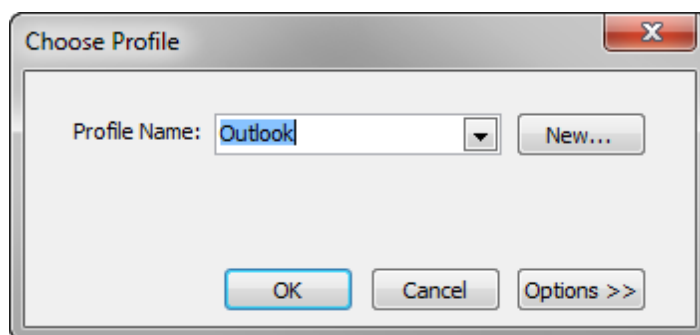


13. Close the remaining dialog boxes to exit the setup.

To create an e-mail database:

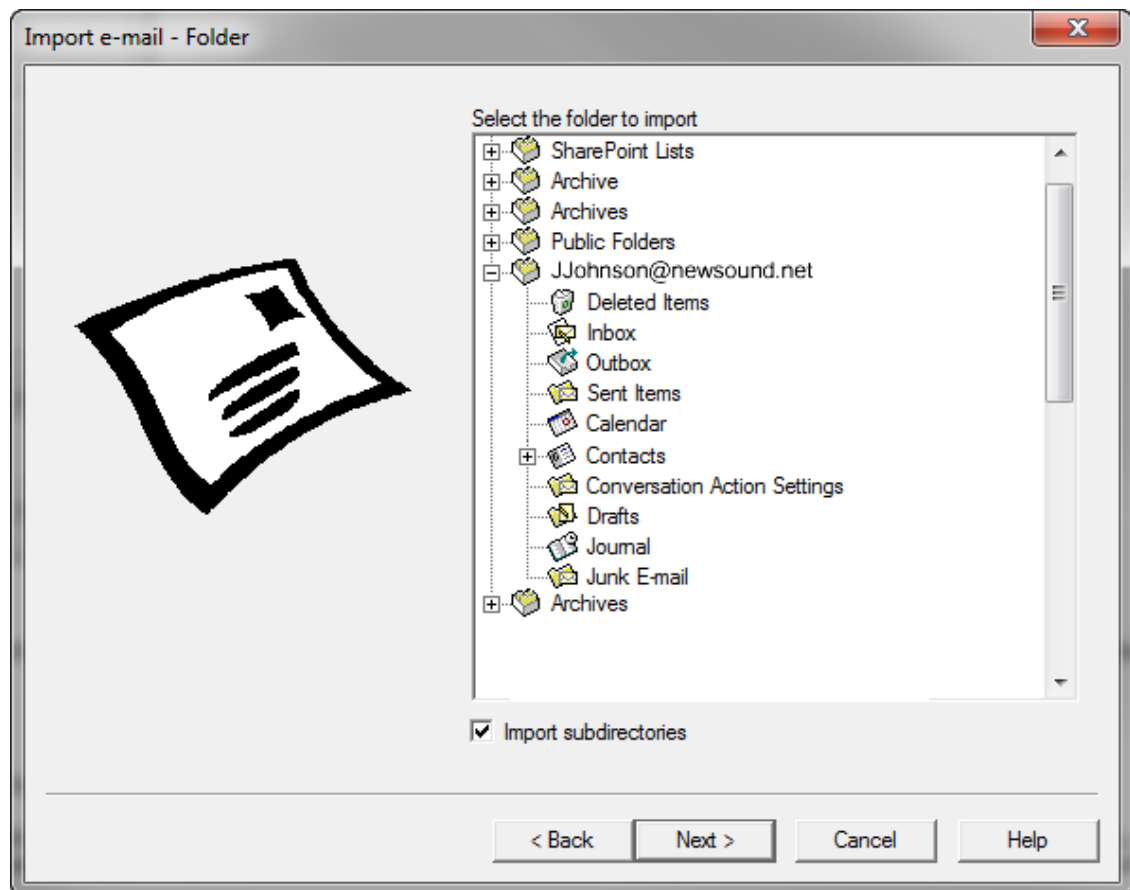
The second step in importing e-mail and attachments is to create a database for your e-mail and attachments.

1. In Concordance, on the **File** menu, click **New**.
2. In the **New Database Creation Wizard** dialog box, click the **E-mail and Attachments** button.
3. In the **Choose Profile** dialog box, from the **Profile** list, select the email profile you want to use, and then click OK.

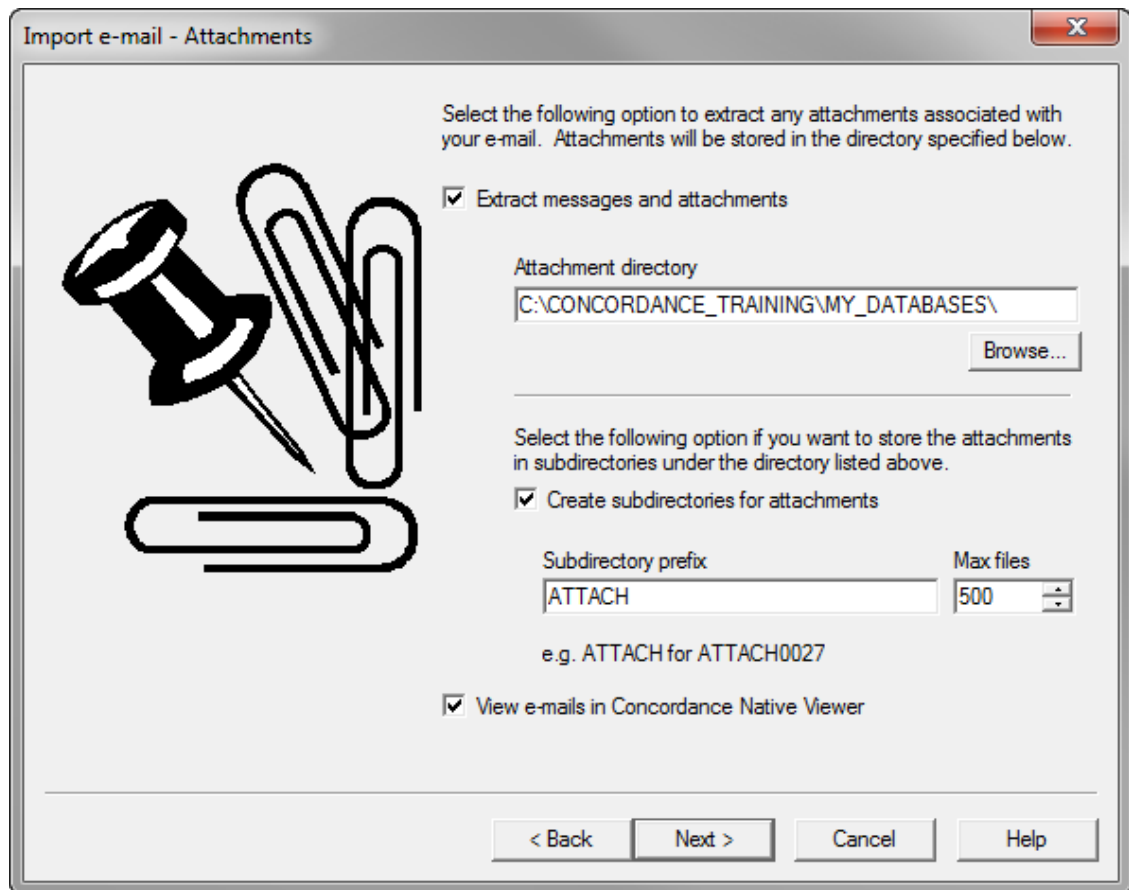


4. For the **Enter Database Name** field, click the **Browse** button, navigate to where you want to save the database, type a file name for the database, and then click **Save**.
5. When finished, click **Next**.
6. In the the **Import e-mail - Folder** dialog box, click the .pst folder associated with the e-mail profile you created.

To import the entire .pst file, be sure to click the .pst file's top-level folder. If you select a folder that does not contain e-mail messages, such as the Microsoft Outlook calendar or contacts, the folder can be imported, but the records created will not be complete because the Import e-mail wizard only imports information related to e-mail messages.



7. To include the folder's subdirectories, make sure that the **Import subdirectories** check box is selected, and then click **Next**.
8. In the **Import e-mail - Attachments** dialog box, specify any of the following, and then click **Next**:



- To extract attachments, make sure that the **Extract .MSG files and attachments with e-mail** check box is selected, and browse to the directory where you want to store the extracted email files and attachments.

E-mail .msg files and attachments can be extracted and saved to a specific directory.

By default, the Extract .MSG files and attachments with e-mail and Create subdirectories for attachments check boxes are selected. The Attachment directory field defaults to the e-mail database's directory, the Subdirectory prefix field defaults to ATTACH, and the Max files field defaults to 500.

It is best practice to store attachments in subdirectories, especially when you are managing large numbers of attachments.

- To store email .msg files and attachments in subdirectories of the directory displayed in the **Attachment directory** field, make sure that the **Create subdirectories for attachments** check box is selected. In the **Subdirectory prefix** field, type the prefix you want to use for the subdirectory folder names, and in the **Max files** field, type or scroll to the maximum number of files allowed in each subdirectory.

Subdirectories are named using a prefix and a number. For example, if you specify the prefix *ATTACH* and the maximum files to store as 500, the first subdirectory created will be *ATTACH0000*. After that directory is filled with 500 files, the import creates the *ATTACH0001* directory, and proceeds to store attachments in the *ATTACH0001* directory until it reaches 500 files. This process continues until all the attachments are extracted.

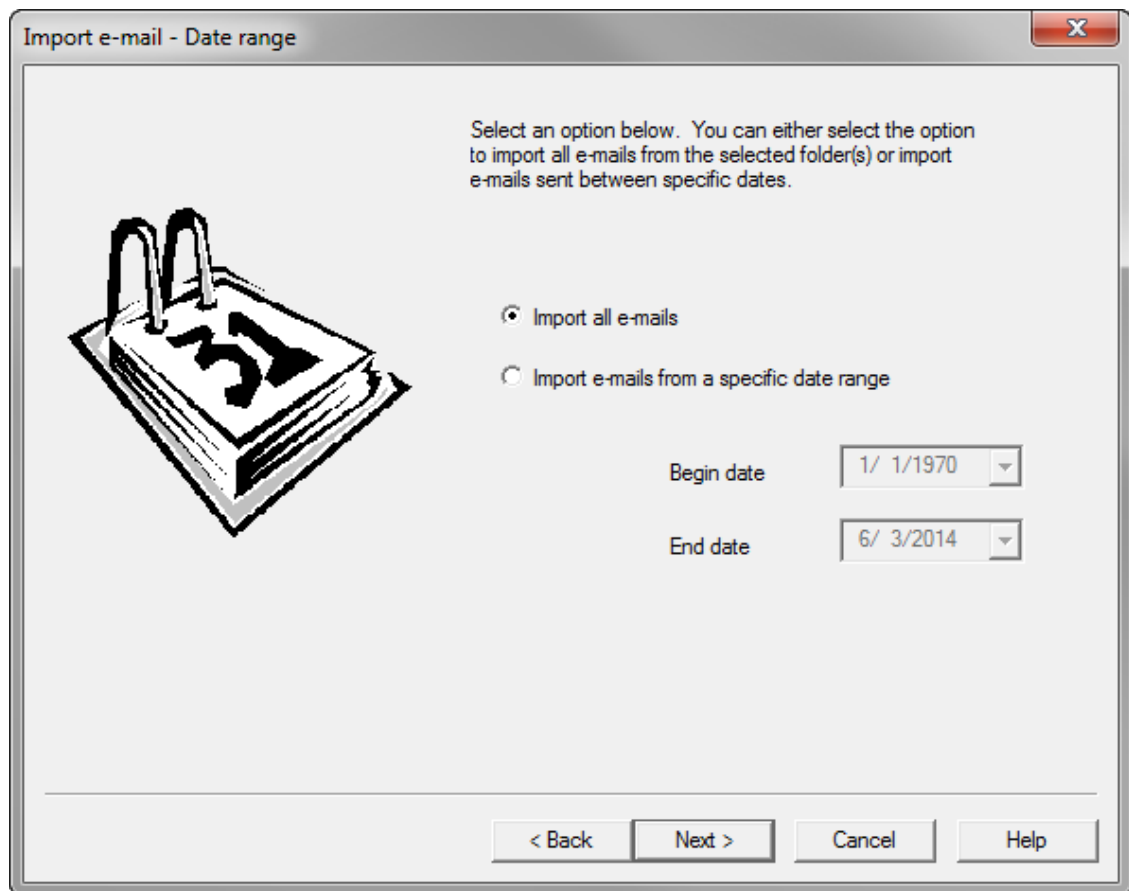
- To display e-mails in Concordance Native Viewer for review, select the **View e-mails in**

Concordance Native Viewer check box.

Selecting this option creates the Concordance Imagebase (CIB) file that is needed to link the view of the e-mail files with the corresponding record in Concordance. You must modify the the database and make DOCID the image key field. To modify the database fields, see

⚠ When working with Concordance Native Viewer, each document must contain a unique ID. You must select the Auto-number option in the **Import e-mail - Options** dialog box. The DOCID can be automatically generated by Concordance or you can specify your own numbering scheme by setting the Prefix and Starting Number.

9. In the **Import e-mail - Date range** dialog box, specify any of the following, and then click **Next**:
- To import all e-mail messages in the selected .pst folder, select the **Import all e-mails** option.
 - To import only the e-mail messages for a specific data range in the selected .pst folder, select the **Import e-mails from a specific date range** option and then specify the **Begin Date** and **End Date**.



10. In the **Import e-mail - Fields** dialog box, specify any of the following, and then click **Next**:

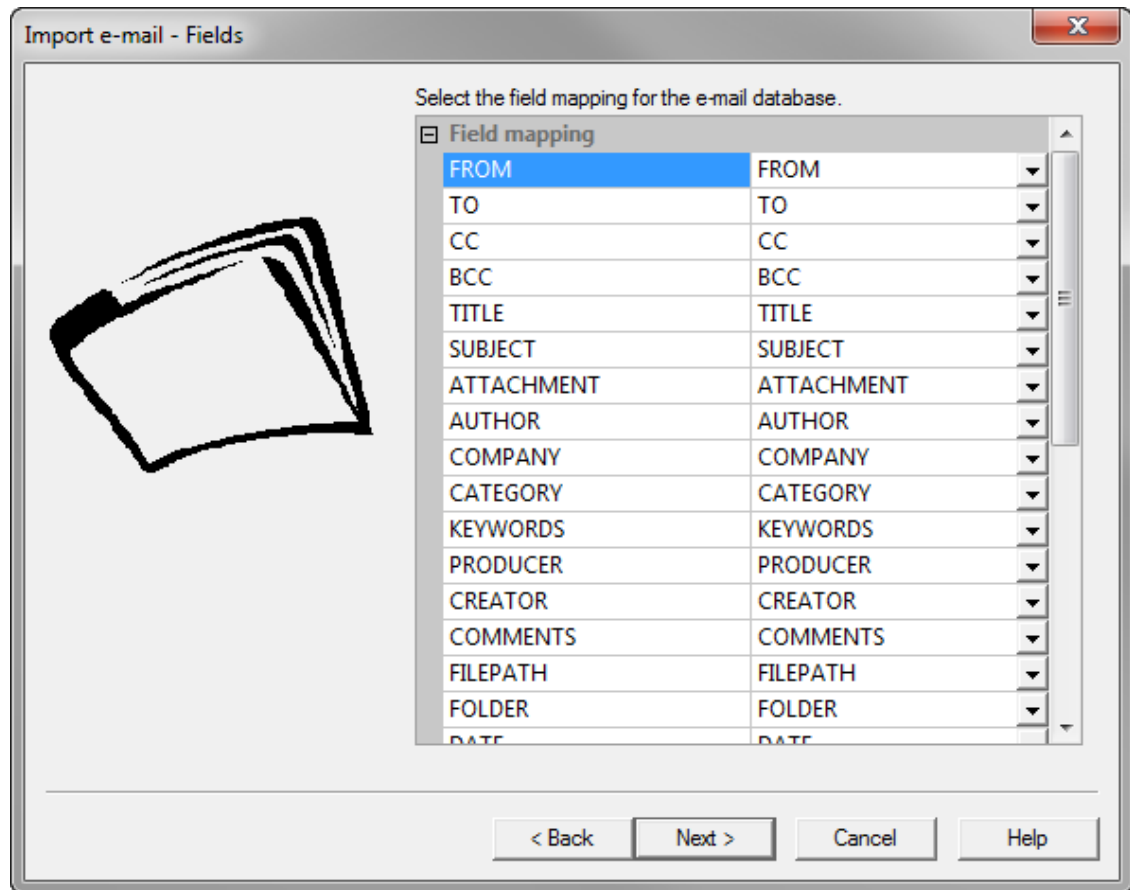
You can map specific e-mail fields, such as the sender and recipient, to Concordance

database fields. Using the E-mail and Attachments template to create your e-mail database ensures all fields exist for accurate mapping between e-mail messages and the Concordance fields. The E-mail and Attachments database template has all the fields necessary to import and store e-mail messages.

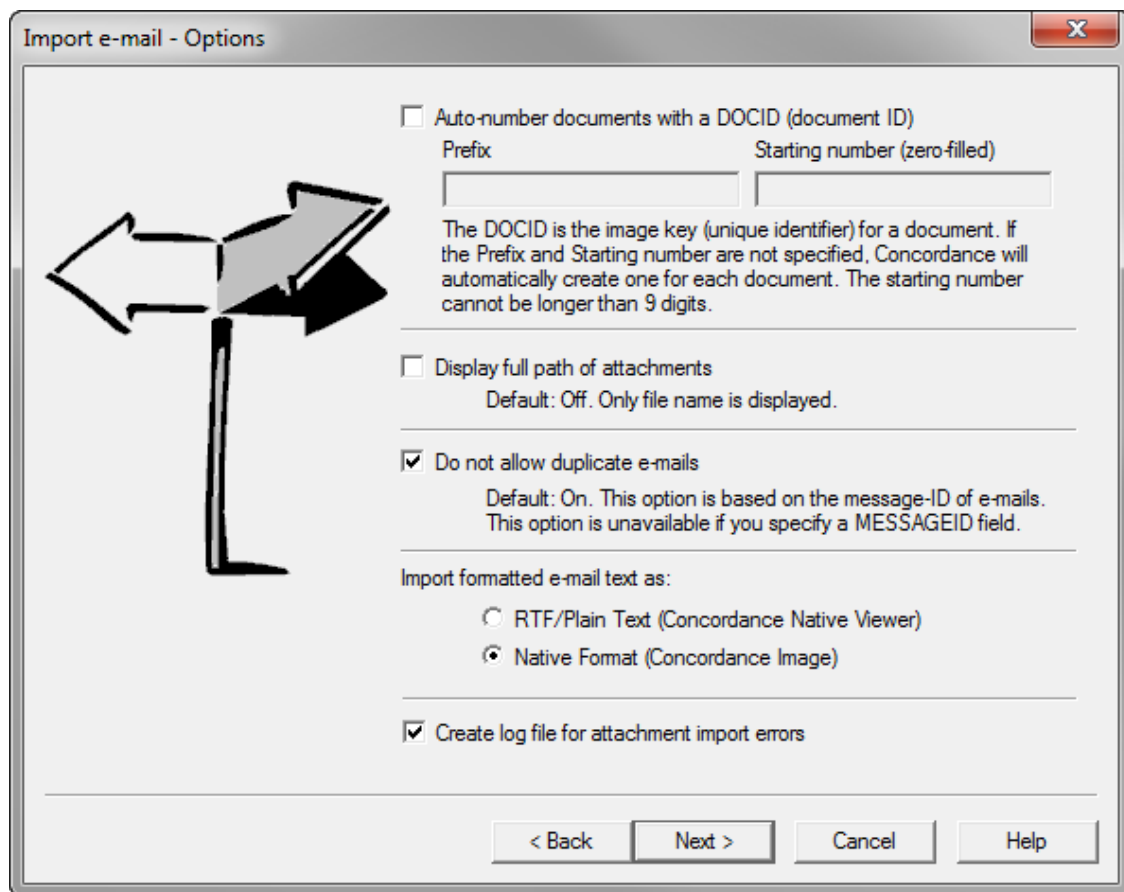
The left column displays the e-mail message fields, and the right column displays the database fields.

If your e-mail database was created from the E-mail and Attachments template, the database fields are automatically mapped to the correct e-mail message fields.

If your e-mail database was not created from the E-mail and Attachments template, select the database fields you want to map to the e-mail message fields.



11. In the **Import e-mail - Options** dialog box, specify any of the following, and then click **Next**:



- To auto number the imported e-mail messages, select the **Auto-number documents with a DOCID (documentID)** check box, and then enter the **Prefix** and **Starting number (zero-filled)**.

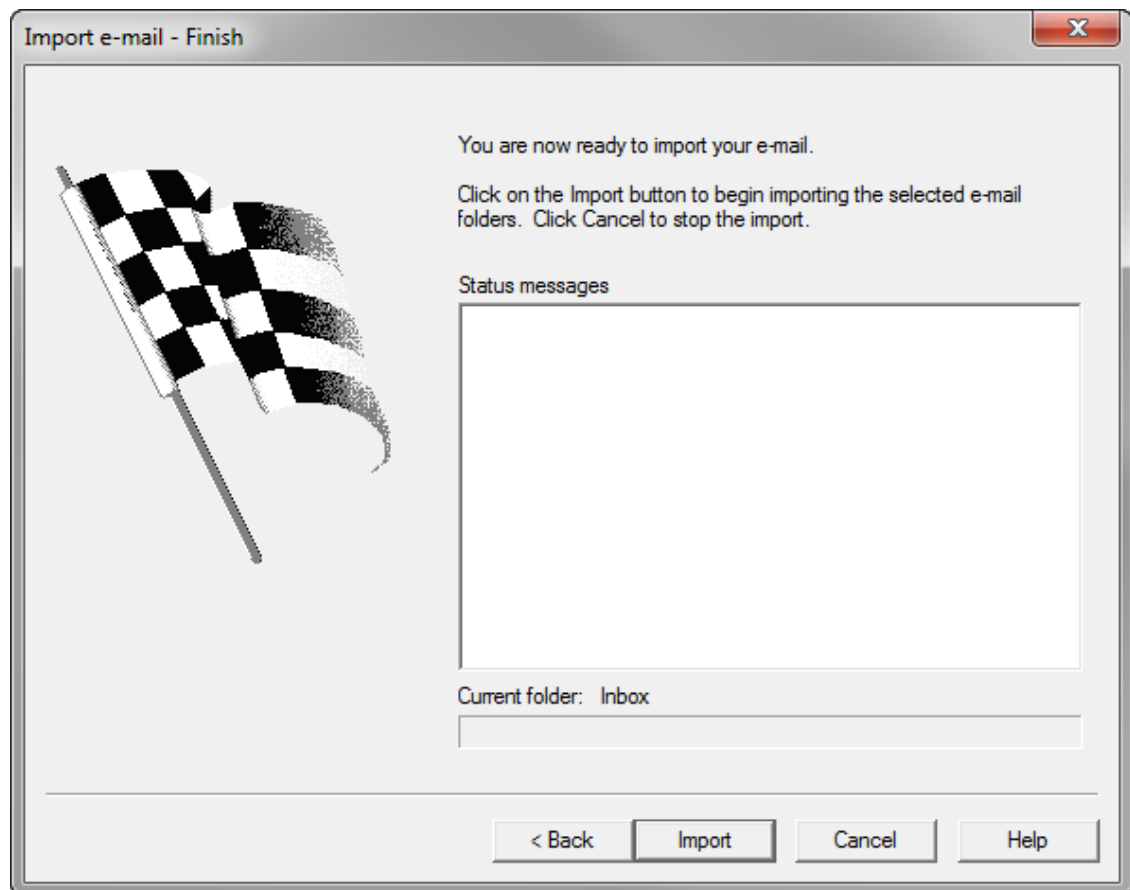
Auto-numbering your documents when importing e-mail messages provides a prefix and starting number for each e-mail message and any attachments, while also tracking family groups in a DOCID and PARENT_DOCID field. If the option is selected and the Prefix and Starting number are not specified, Concordance will automatically create one for each document.

The Auto Number documents with DOCID option must be selected to successfully view the documents in Concordance Native Viewer.

- Select the **Display full path of attachments** check box to display the full path to attachments.
By default, only the file name is displayed.
- Select the **Do not allow duplicate e-mails** check box if you do not want to import duplicate e-mails.

Most e-mails have a unique message identifier called the message-id. This entry is stored in the MESSAGEID field. Before importing a message, the Import e-mail wizard checks to see if any previously imported e-mails have the same message-id. If the wizard finds another record with this message-id, it does not import the message.

- Select the **Import HTML formatted e-mail text as** check box to import the body of HTML formatted e-mail messages as RTF/Plain text or Native Format formatting, and then select the text format to use to convert the format.
 - Select the **Create log file for attachment import errors** check box if you want the import to create an import error log.
12. In the **Import e-mail - Finish Import** dialog box, click the **Import** button to start the import.



13. When the import is completed, click the **Done** button.

To verify the imported files:

Once you have created the email database, it is best practice to verify that the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. In the **Browse** view, verify that the e-mail messages you imported display properly.
3. If you have not already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

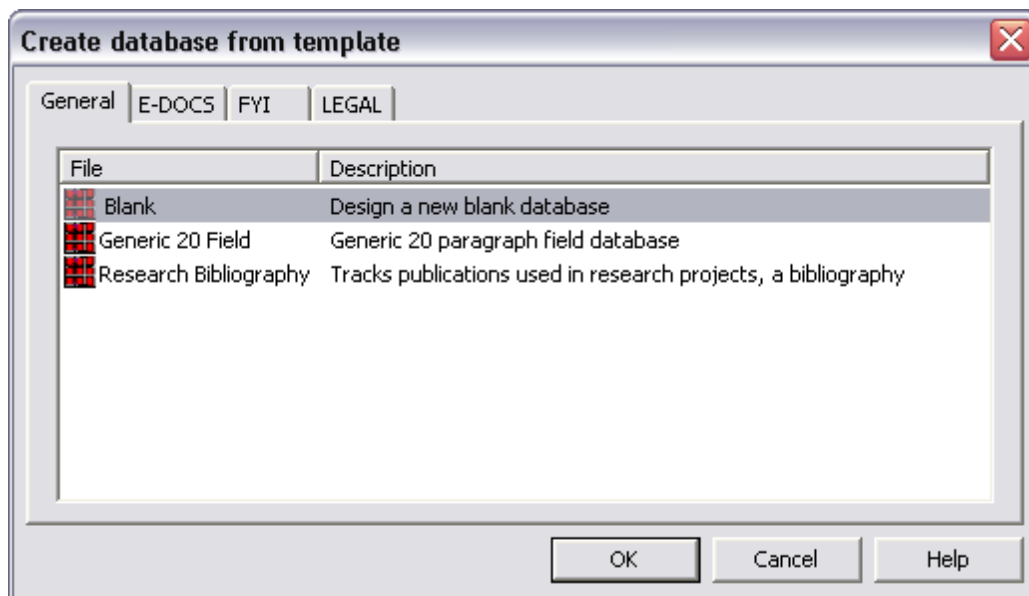
If you receive the following message, Dictionary file exists, overwrite?, click Yes.

Using a database template

Database templates are stored in the Concordance Templates folder and its subfolders: *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10 (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10 (Windows 7)*.

All templates in the Templates folder and the Templates folder's subfolders are displayed in the Create database from template dialog box. With the exception of the General tab, the Templates folder subfolders are displayed as tabs in the dialog box. The General tab contains all database templates in the main Templates folder.

You can save your database templates in one of the existing Templates folders or create your own Templates subfolder. Concordance comes with some pre-defined templates and template subfolders. You can modify or delete the pre-defined templates and subfolders if they do not meet your organization's needs.



- ✓ When you create a database, a temporary subfolder is added to the database folder structure. This folder is only temporary and will be removed when the database is closed.

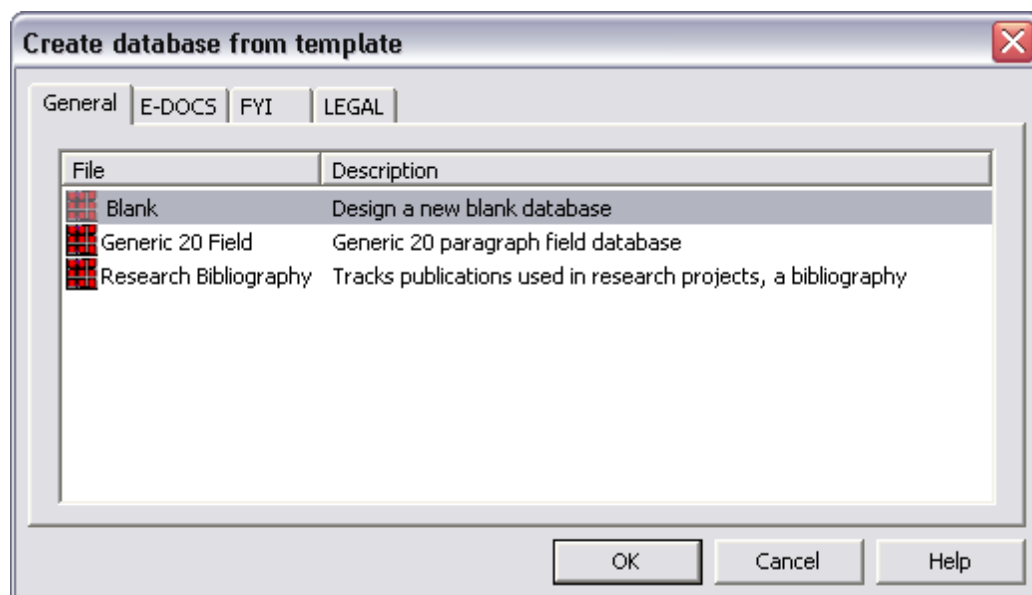
Pre-defined Database Templates

Pre-defined Database Templates	
Folder Name	Template Name
Templates*	Blank
	Generic 20 Field
	Research Bibliography
	*The Templates folder is displayed as the General tab in the the Create database from template dialog box.
E-DOCS	E-Documents
	E-mail And Attachments
FYI	Fyi log
LEGAL	Litigation Document Production
	Transcripts

To create a database from a template:

1. In Concordance, on the **File** menu, click **Template**.

Clicking Template opens the General tab in the Create database from template dialog box.



2. Select one of the following templates, and then click **OK**:

- **General tab** - contains general purpose **Blank**, **Generic 20 Field**, and **Research Bibliography** database templates
 - **E-DOCS tab** - contains the **E-Documents** and **E-mail And Attachments** database templates
 - **FYI tab** - contains the **Fyi log** database template
 - **LEGAL tab** - contains the **Litigation Document Production** and **Transcripts** database templates
3. In the **Create Database** dialog box, navigate to the directory where you will store your database, type the name of the database file in the **File name** field, and then click **Open**.

When creating a database, the maximum number of characters allowed for a file path name is 199. Any

If there are predefined fields in the template you selected, they are displayed in the New dialog box. If you selected the Blank template, there are no predefined fields, and you will have to define all of the fields in the database. See, Basic Database Fields and Admin Database Fields.

Field Name	Type	Length
BEGNO	Text	15
ENDNO	Text	15
DOCDATE	Date	MMDDYYYY
DOCTYPE	Paragraph	
DOCTITLE	Paragraph	
AUTHOR	Paragraph	
RECIPIENT	Paragraph	
PAGES	Numeric	20.0
OCR1	Paragraph	
OCR2	Paragraph	
ACCESSID	Numeric	20.0
CREATEDATE	Date	MMDDYYYY
EDITTRAIL	Paragraph	
PRODBEG1	Text	15
PRODBEG2	Text	15
PRODNOTES1	Paragraph	
PRODDATE1	Date	MMDDYYYY
PRODTAGS1	Paragraph	
TAGS	Paragraph	
TAGINFO	Paragraph	
CUSTODIAN	Paragraph	
REVIEWSTATUS	Paragraph	

Status

Documents	0
Fields	22

Punctuation: `.,/:-@\$`

Name:

Type:

Length:

Places:

Format:

☒ Image ☒ Key ☐ Accession

☐ System ☐ Indexed

Buttons: New, Insert, Delete, Save To File, Append Equivio Fields, OK, Cancel

The FYI Server and FYI Reviewer do not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, FYI Server and FYI Reviewer only support user names, passwords, or database names containing single-byte characters, such as English characters.

If your organization uses FYI Server and FYI Reviewer, be sure to only use single-byte characters when creating user names, passwords, and database names in Concordance.

4. Review the punctuation in the **Punctuation** field and add any other punctuation that is integral to your searches, such **;-@\$. For more information, see About Punctuation**

The Punctuation field defaults to the following punctuation: '.,/,. This punctuation is the punctuation list for full-text

5. To add a field to the database, click the **New** button.

-  Make sure that the database fields you are creating match the fields in the header row of the corresponding delimited text file you will be using to import the field data. See, [Importing delimited text files](#).

For more information about fields in Concordance, see [About fields](#).

6. In the **Name** field, type the name of the field.

Field names can be entered in upper or lower case letters, but they will always be displayed in Concordance in all caps. For example, if you enter begno, it will be displayed as BEGNO.

Field names must begin with an alphabetic character and only alphanumeric characters and the underscore character are allowed in the name. Names can be from one to twelve characters long.

The order the fields are listed in the New or Modify dialog box, is the order the fields will appear in Concordance.

You can modify the field order using the Insert or Delete buttons. For more information about using the Insert and Delete buttons, see [Step 10](#).

-  If you accidentally click the OK button or press ENTER while entering fields in the New dialog box, you will close the dialog box. To reopen it, on the File menu, click Modify. Click the New button to add a new field to your database.

Clicking OK saves the data entered in the dialog box and saves the database. When you reopen the New dialog box in the database, the dialog box name is changed to the Modify dialog box.

7. Define the field type.

 To create a text field:

1. In the **Type** field, click **Text**.
2. In the **Length** field, type the number of characters allowed in the field value.

Text fields can have from 1 to 60 characters. Fixed length text fields should be used for numeric values that are not used mathematically, such as telephone numbers, social security numbers, and other serial numbers.

The numbers 1 and 1000 sort before 9 and 999. Use zeros for any numeric values or serial numbers stored in text fields so that they sort correctly, 0009 before 1000.

The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

The Places and Format fields are only used for numeric field types.

 To create a numeric field:

1. In the **Type** field, click **Numeric**.
2. In the **Length** field, type the number of characters allowed in the field value.

Numeric fields can have up to 20 characters, including the decimal place. The number you type in the Length field defines the total length of the number including the decimal place and all digits following the decimal place.

The field length value, affects the column width and how the field name appears in the Table View. The larger the number the wider the column. Values smaller than 20 cause the field name to appear truncated.

3. In the **Places** field, type the number of decimal places for the numeric field.

For example, the number 1234.56 would have a field length of seven and a places entry of two.

Negative numbers use an extra place for the negative sign.

4. In the **Format** field, choose one of the following numeric field formats:

- **Plain**
- **Comma**
- **Currency**
- **Zero Filled**

The Format field determines how numeric fields are displayed and printed in Concordance.

 To create a date field:

In the Type field, click one of the Date field format types:

- **Date MMDDYYYY** (month-day-year)
- **Date YYYYMMDD** (year-month-day)
- **Date DDMMYYYY** (day-month-year)

The date field format you choose is the date format that is displayed in Concordance.

You need to use the date format selected in the Type field when searching for dates and entering dates during data entry.

Concordance sorts date fields correctly, regardless of the date format you choose in the

Type field.

The Length, Places, and Format fields are not used for date or paragraph fields.

To create a paragraph field:

In the Type field, click Paragraph.

Paragraphs fields can have up to 12 million characters. Even though paragraph fields are variable in length, Concordance only sorts paragraph fields by the first 60 characters in the first line of text.

Paragraph fields are typically searched using Boolean, context, and proximity search operators, but you can also search paragraph fields using relational operators.

The Length, Places, and Format fields are not used for date or paragraph fields.

8. Select the check boxes for the field properties that apply.

Image (Media) check box

A image/media field is used to link Concordance with a viewer, such as Concordance Native Viewer, Concordance Image or Opticon. The Media check box only needs to be selected for one of the database's fields. It is best practice to select the Media check box for the BEGNO field or it's equivalent.

You need to configure the image viewer for Concordance in the Preferences dialog box. For more information, see Defining preferences.

Regardless of the image viewer you use, when you view a document associated with an record in Concordance, the corresponding media/image is displayed in the selected viewer.

Key check box

Selecting the Key check box makes the field a key field. Any field can be a key field, but most often fixed-length fields and date, numeric, and text fields that you need to search are designated as key fields. Key fields perform a function similar to indexing, but they do not require reindexing. When fields are designated as key fields, Concordance creates a database .key file, which is used in searching key fields.

Full-text paragraph fields are usually made into key fields for only one reason, which is to quickly locate empty paragraph fields.

For example, the search *author = ""*, where AUTHOR is full-text paragraph field, would normally perform slowly, but it will work quickly when the AUTHOR field is a key field. To locate records where this field is not empty use the search *author > ""*. Note that there are no spaces between the quotes.

So, why not make all fields key fields? The key field file takes up room. The more key fields your database has, the more room it will take up. Typically, full-text paragraph fields are not searched using comparison operators. Making full-text paragraph fields key fields is of marginal benefit and adds administrative overhead to the database management system. Also, if you have fixed-length fields that you do not need to search, it is best practice not to designate those fields as key fields.

 Accession check box

Accession numbers are unique serial numbers internally assigned to each record in Concordance version 6.x or later databases. Accession numbers are stored with each record and are managed entirely by the database software. They stay with the document as long as the document stays in the database, even if other records are deleted around it. Accession numbers cannot be edited or modified in any way, but they can be viewed.

The Accession check box only needs to be selected for one of the database's fields. To create accession numbers, create an accession field by adding a numeric field to your database and selecting the Accession check box. It is best practice to select the Accession check box for the ACCESSID field or its equivalent. The internal accession number for each record will be displayed in the accession field you create.

 System check box

System fields are created by Concordance. Concordance automatically selects the System check box for system fields, which are hidden fields with no read or write end-user privileges. System fields are used for internal system administration features such as replication. Under normal circumstances, system fields should never be indexed, added, deleted or modified by users.

 Indexed check box

A field must be indexed to use Concordance's full-text search capabilities. Indexing places every word in the field into a dictionary for fast retrieval. Concordance automatically selects the Indexed check box when you create a paragraph field. You need to manually select the Indexed check box if you want to index other field types.

You can change the Indexed check box setting at any time, however changing the setting will not update the dictionary. Index the database after modifying the Indexed check box setting to update the dictionary files.

9. Click the **New** button to continue adding more fields to your database.

Use the Insert or Delete buttons, as needed, to rearrange or remove your database fields. These buttons also work as cut and paste tools.

To move a field, click the field in the field list, click the Delete button, then click the field just below where you want to move the field, and click the Insert button.

To insert a new field into the existing field list, click the field just below where you want to add the field, and click the Insert button.

To delete a field, click the field in the field list and click the Delete button.

10. If you would like to save the list fields in your database to a .txt file, click the **Save To File** button.

The Append Equivio Fields button adds pre-defined Equivio fields to your database. If your organization uses Equivio, you can use Equivio with Concordance v10.19 or earlier to compare text in your e-mail databases within Concordance.

For more information about creating Equivio database fields and using Equivio with Concordance, see Using Equivio with Concordance.

11. Click the **OK** to save your database.

Creating a database template is great for building future Concordance databases. Database templates are created by exporting an existing database's structure. When you export a database template, the template includes fields, data types, properties, punctuation, stopwords, field data validation settings, and .ini file settings like alias groups and tags. The database structure is stored in a database.dcb file. Security settings are not included in the template.

 To create a database template:

1. In Concordance, open the database from which you want to create a database template.
2. On the **Documents** menu, point to **Export**, and click **Structure**.

Clicking Structure opens the Copy Structure dialog box.

3. Navigate to the **Templates** folder or one of its subfolders, type the name of the database file in the **File name** field, and click **Save**.

If you want to create a new subfolder, navigate to the Templates folder, create the subfolder, type the name of the database file in the File name field, and click Save.

Related Topics

About Concordance databases

Reviewing load files

Creating a database

Creating an eDocuments database

Creating an Email database

About exporting data

Setting data validation

Once you have created your database and its fields, you can define the data validation attributes for your database fields in the Data Entry Attributes dialog box. Data validation attributes are settings that define how data is entered in fields within the Edit view.

For example, you can define a field that only allows upper case letters for field values or you can make a field read only. You can also define the parameters for authority lists, which are field value lists. Your data validation selections are stored in the database's [database name].ini file.

For more information about authority lists, see [Creating word lists](#).

Field Name	Type
BEGNO	Text
ENDNO	Text
DOCDATE	Date
DOCTYPE	Paragraph
DOCTITLE	Paragraph
AUTHOR	Paragraph
RECIPIENT	Paragraph
PAGES	Numeric
OCR1	Paragraph
OCR2	Paragraph
CREATEDATE	Date
EDITTRAIL	Paragraph
ACCESSID	Numeric
PRODBEG1	Text
PRODEND1	Text
PRODNOTES1	Paragraph
PRODTAGS1	Paragraph
TAGS	Paragraph
TAGINFO	Paragraph
CUSTODIAN	Paragraph

Data validation

Upper case ☐ Alphabetic only ☐
 Lower case ☐ Numeric only ☐
 Advance on enter ☐ Validate dates ☐
 Read only ☐ Edit date ☐
 Disable rich text ☐ Creation date ☒

Authority lists

File...

Required for data entry ☐
 Single entry field ☐
 List updateable by user ☐
 Upper case conversion ☐

Delimiter

OK Cancel

To define data validation attributes for fields:

1. On the **Edit** menu, click **Validation**.
2. In the **Field Name** list, click the field for which you want to define data validation attributes.
3. In the **Data validation** section, select the options you want to apply to the field.

Date validation definitions

- **Upper case** - converts field text automatically to all upper case letters.
- **Lower case** - converts field text automatically to all lower case letters.

The Upper case and Lower case check boxes are only supported with English text.

- **Advance on enter** - advances the cursor to the next field when a user presses the Enter key in the Edit view. This functionality is the default setting for fixed-length fields. If you select the Advance on enter check box for a full-text field, but need to insert a carriage return within the field, press CTRL+ENTER.
- **Read only** - allows users to view and copy data from the field, but they cannot edit or modify the field.
- **Disable rich text** - disables the Rich Text toolbar and only allows plain text to be entered in the field. Existing rich text will remain in the original format. Used for text fields.
- **Alphabetic only** - allows only alphabetic characters in the field.
- **Numeric only** - allows only numeric characters in the field.

✍ The Alphabetic only and Numeric only check boxes are only supported with English text.

- **Validate dates** - validates whether a real date is entered in the field. The Validate dates check box allows users to enter partial dates in the field, with zeros for unknown days, months, or years. If an invalid date is identified, users can correct the date or ignore the error. Is used for date fields.
- **Edit date** - populates the field with the current date automatically when a record is edited. Select this option for the EDITTRAIL field or its equivalent.
- **Creation date** - populates the field with the current date automatically when a record is created in Concordance. Select this option for the CREATEDATE field or its equivalent.

4. To assign an authority list to the field, click the **File** button.

✍ The Data validation and Authority lists sections in the Data Entry Attributes dialog box are independent sections. For example, assigning an authority list with words to a field selected as Numeric only does not cause an error. The data from the authority list overwrites the Numeric only setting.

5. In the Open dialog box, navigate to and open the authority list file, **.lst**.

6. Select the check boxes that apply to the authority list.

Authority list definitions

Required for data entry When the user's cursor is placed in the empty field, the authority list automatically opens. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field. When the Required for data entry check box is selected, users can only choose a field value from the list or cut, copy or paste the text in the field.

Single entry field The field allows only one field value from the list to populate the field. If a user clicks another field value from the list, the original value is replaced by the newly selected value. You can select both the Single entry check box and the Required for data entry check box to ensure users can only populate the field with one field value from the authority list.

List updateable by user Users can add and delete field values from the authority list assigned to the field. If you do not want users to modify the authority list, make sure that the List updateable by user check box is not selected. When the List updateable by user check box is selected, the Insert and Delete buttons are displayed at the bottom of the authority list dialog box.

Upper case conversion Concordance automatically converts all text to upper case before text is copied to the field or the text is added to the authority list. Do not select the Upper case conversion check box if you are using an existing authority list containing lower case field values. If the check box is selected in this scenario, when a user selects a lower case field value from the list, the value will not be added to the field.

7. The **Delimiter** field defaults to the comma character. To change the field delimiter, type a different character in the **Delimiter** field.

The character in the Delimiter field is used to separate field values that were added to the field from an authority list. Delimiters are also used by exploded sort reports and the tally function to determine where one entry ends and another begins.

8. Click **OK** to save your changes.

Indexing Databases

About indexing databases

A Concordance database must be indexed prior to searching. When you run an index for your new database, you are actually creating and populating the Concordance dictionary and index files for the first time. How your database records are indexed ultimately affects how reviewers search for information:

- Full-text searching works only on indexed fields
- Relational searching is for non-indexed fields or keyed fields
- Paragraph fields are indexed by default

You can, however, index just about anything in your database depending on how you create the database structure. When you are building your database, you want to plan which fields to include in the dictionary and index. The smaller the dictionary and index, the faster your searching and indexing speeds will be.

Indexing versus Reindexing:

- Indexing is performed when the initial database is built, and needs to be performed after every database modification, including changes in fields, punctuation or the stopwords list. Indexing is an exclusive process.
- Reindexing is performed when new records are added to the database or when there are new annotations and modifications to record content. Reindexing appends new information to both the index and dictionary files.

Indexing Considerations

Indexing and reindexing databases is integral in keeping your database updated with current review information, free of unnecessary and obsolete files, and processing efficiently for full-text searches by the review team. Indexing large datasets is time consuming, but is a standard process and part of your database maintenance schedule.

When Concordance databases are built, the index and dictionary are generated from the document contents. The dictionary contains a list of every word or string of characters in the database's record collection. The index contains directions to every word or string of characters in the database.

Example: *airforce1* or *ABC00001*

Both *airforce1* and *ABC000001* qualify as index entries and are searchable. Concordance considers both examples, including both the letters and numbers, to be a word, because there is no space between the characters. Spaces between characters would disqualify them as words; a space between *airforce* and *1* would be read as two words.

Please consider the following before you index a database and create the dictionary:

- Avoid indexing serial and Bates numbers (unique value fields)

- Punctuation needs to be set only once and only pertains to indexed fields
 - Punctuation is indexed only if embedded between alphanumeric characters. All leading and trailing punctuation is trimmed.
 - Update the database's stopwords list to exclude additional words that you want ignored during indexing and searching
 - A well-defined stopwords list keeps your dictionary and index lean
-  If indexing or reindexing processing speeds seem slow, you may want to increase your computer's RAM and check your cache settings on the Indexing tab in the Preferences dialog box. For more information see the Cache Preferences section in System Requirements.

Index Files

Indexing scans the database and notes where each word occurs. These occurrences are stored in two files created during the indexing process, the dictionary file (.dct) and the inverted text file (.ivt). When you perform a search, Concordance looks in these two files for your words, not in the actual text of the database. Due to the structure of these files, the search is performed very rapidly, much faster than searching each document one-by-one for every word.

The dictionary file is stored in the database directory folder. The .dct file contains all dictionary words and their hit and document counts.

The inverted text file is accessed along with the .dct file when reviewers perform searches. The .ivt file contains a path to all words, along with the applicable number for each record, field, line, and word for each word in the .dct file.

Both the .dct and .ivt files contain a B-tree data structure, and the size of each file is important. When full-text searches are performed, this process only accesses these two files.

-  Building the initial index for these records can take many hours. Reindexing a day's worth of new documents could take a few hours, so it is better to reindex after entering a few records in order to have that content searchable in a timely manner.

Indexing Process

Concordance follows several rules when indexing the database. Words must begin with an alphabetic or numeric character. Once the beginning of a word is found, Concordance scans until it finds the first non-alphanumeric character. This character is compared against the list of embedded punctuation characters. If the character, such as a decimal point, is found in the list and the following character is alphanumeric, then that punctuation is included in the word. Otherwise, the first non-alphanumeric character will mark the end of the word.

Embedded Punctuation

User definable embedded punctuation is provided so that hyphenated words, dates, decimal numbers, and contractions are not split into two or more words. By default Concordance uses ` . , / characters for embedded punctuation. Note that the hyphen is

not included in the default set. You may want to include them, but it is recommended that you leave them out. Proper names, such as *Mary Smith-Jones*, would only be searchable under the Smith prefix if hyphens were used as embedded punctuation. Use the Punctuation field in the Modify dialog box to change the default characters.

Case Sensitivity

Concordance is not case sensitive. All words are converted to upper case letters when placed into the dictionary. All searches are likewise converted to upper case before being processed. This upper case conversion does not affect the original text that exists in your documents.

Word Length

A word can be any length of characters, but only the first 64 are considered significant. Longer words are truncated to 64 characters when they are stored in the dictionary. When you search for a word longer than 64 characters, your search word is truncated before being looked up in the dictionary. The source text is not affected.

Stopwords

Words that occur frequently, such as *the*, *and*, and *or*, have little search value. Such words are commonly referred to as noise words. Concordance stores these types words in a stopword list. Words that occur in the stop list are not stored in the dictionary. Excluding them from the dictionary saves time in the indexing process and significant disk space on your computer without impairing the database's ability to retrieve data. The list of stopwords is user defined and can be printed or changed in the Stopwords dialog box. If you have not specified any stopwords for your database, Concordance uses the default list in the concordance_[version #].stp stopwords file.

The stopword dictionary is used during the indexing process. Adding or deleting words from the stopword dictionary does not affect the existing database dictionary. Editing the stopword dictionary requires a complete index of the database for the changes to take effect.

For more information about stopwords, see Updating the stopwords list.

Indexing and reindexing updates

Actively used databases need frequent updating to keep the index and dictionary entries current. In Concordance, we refer to creating the database index as a *full index*, and refer to an index update as a *reindex*, which simply updates the database dictionary and its corresponding

index.

Reviewers are typically not given indexing or reindexing privileges because of the sensitivity involved in running these processes. Concordance administrators must ensure that all data is reviewed and proper back-ups are made before indexing or reindexing the database with updates.

For information about indexing and reindexing concatenated databases, see Indexing and reindexing concatenated databases.

Indexing Databases

There will be times when you need to perform full index updates to include modifications to the dictionary, stopwords list, and punctuation settings. This is an exclusive process and only the administrator can access the database at this time.

When performing a full index, please consider the following:

- Perform a full index when all reviewers are logged out of Concordance, processing can take hours and impacts access to the system and work activity
- When possible, plan to perform full indexes when it doesn't impact regular work hours
- Alert all reviewers of when indexing will occur and the timeframe for when the system may be available again
- Verify that all reviewers are logged out of the system before you run this process
- Consider performing full indexes for individual databases on separate machines

 You may find it useful to maintain an email distribution list for the review team for times when you need to ask everyone to exit a database.

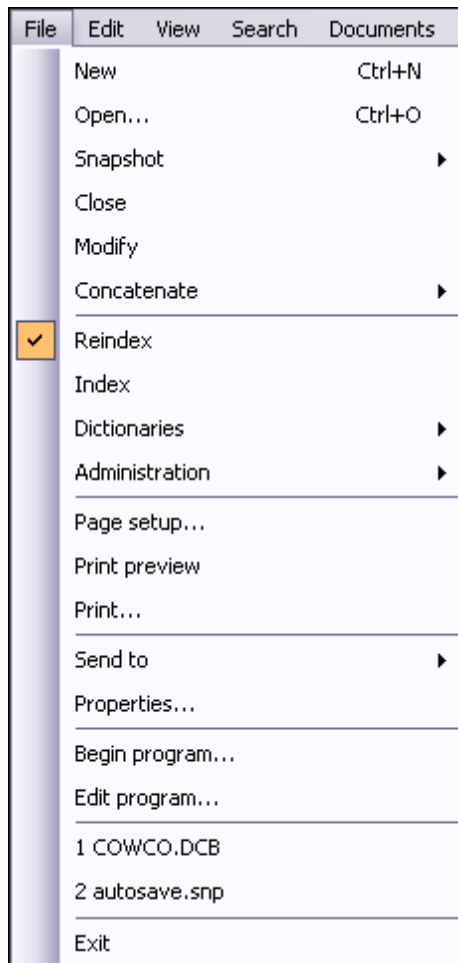
To index a database:

On the **File** menu, click **Index**.

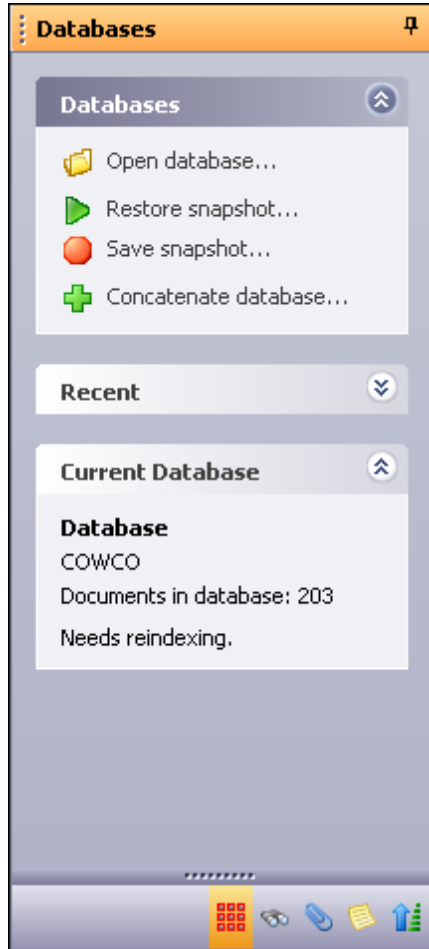
Reindexing Databases

You can determine whether a database needs reindexing on the File menu and the Databases task pane. A database needs reindexing whenever the database dictionary is not current with the additions or changes that have been made to the database since the database was last indexed or reindexed.

On the File menu, Concordance adds a check mark next to the Reindex command:



In the Databases task pane, *Needs Reindexing* is displayed in the Current Databases panel:



When performing a reindex, please consider the following:

- Run a query on edited records or those marked for deletion. To do this, on the Search menu, click Search for edited documents.
- Select the Allow exclusive indexing check box on the Indexing tab in the Preferences dialog box to prevent reviewers from searching during a reindex.

To reindex a database:

On the **File** menu, click **Reindex**.

Finding the database indexing time

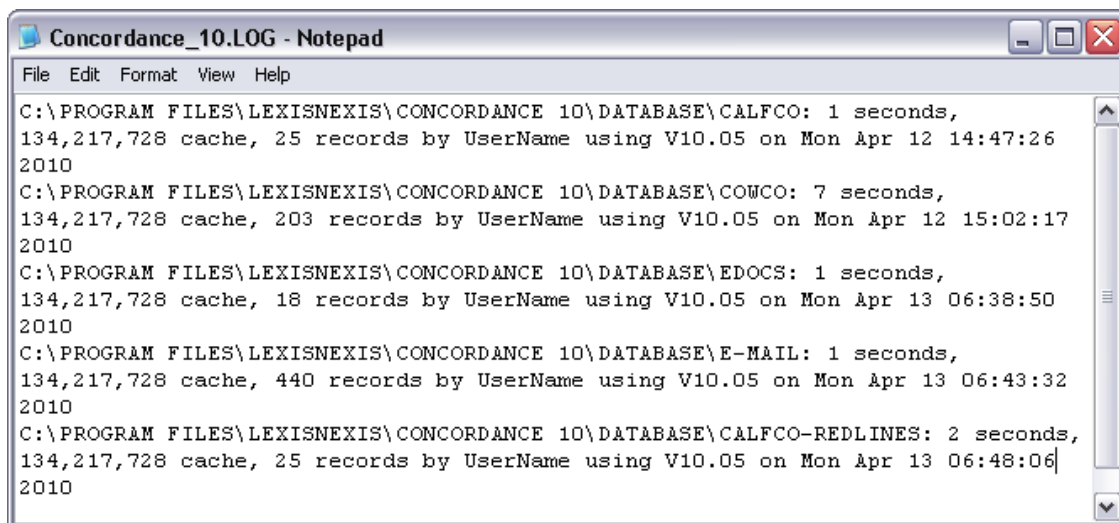
Knowing the indexing time for databases can help you plan your indexing schedules. Once you have built your databases, you can find out how long it takes to index each database by checking the `Concordance_[version #].LOG` file. The `Concordance_[version #].LOG` file is stored in the same directory as the `Concordance_[version #].exe` file.

To find a database's indexing time:

1. Navigate to the Concordance directory folder containing the **Concordance_[version #].exe** file and **Concordance_[version #].LOG** file.

The default directory is `C:\Program Files\LexisNexis\Concordance [version #]` (Windows XP) or `C:\ProgramData\LexisNexis\Concordance [version #]` (Windows 7).

2. Right-click the **Concordance_[version #].LOG** file, point to **Open With**, and then click **Notepad** or another text editor program to open the **.LOG** file.



3. Locate the database name and indexing time.

The indexing time is listed after the database name. The .log file also displays the amount of cache used during processing, the number of database records, and the user who performed the index.

The example of the .log file shows indexing in seconds, but realistically, your database is probably going to index in hours, not seconds.

Updating the stopwords list

Stopwords are the most common words in the English language (and, the, but, etc.). Stopwords are not words that are generally searched for by reviewers. Eliminating stopwords from the index ensures that searches run much faster and efficiently. Stopwords are stored in

the Concordance_[version #].STP file. Concordance automatically creates a list of 141 stopwords in .STP file.

You may receive requests from reviewers to add a specific word that is common to the case review documentation and needs to be avoided during searches. Administrators can modify the Stopwords list for your review team when necessary.

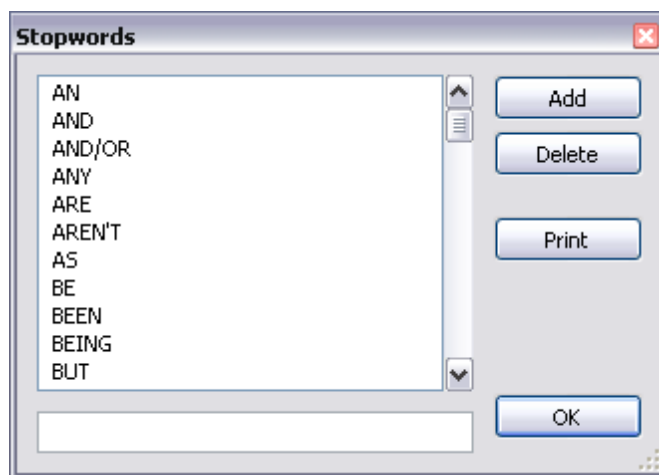
⚠ Editing the Stopword list requires a full index of the database for the changes to take effect.

The Stopword list is only used during the indexing process. Adding or deleting words from the Stopword list does not affect the existing database dictionary until the database is indexed.

☐ To update the stopwords list:

1. On the **File** menu, point to **Dictionaries**, and then click **Stopword list**.

Clicking Stopword list opens the Stopwords dialog box.



2. To add a word to the Stopword list, type the word you want to add in the field below the Stopword list, and click the **Add** button.

Wildcards can be used with stopwords to eliminate large groups of words. For example, adding 9* to the stopwords list eliminates every word or number beginning with the character 9 from the database dictionary.

📌 For searching purposes, it is recommended that only Latin based characters are used in the Stopword list.

3. To search for a stopword, type all or part of the word in the field below the Stopword list.

As you type, the list scrolls to the word closest to the word you are typing. You can also use the scroll bar and buttons to find a word in the list.

4. To delete a word from the Stopword list, click the word in the list, and click the **Delete**

button.

5. To print the Stopword list, click the **Print** button.
6. Click **OK** to save your changes.
7. Index the database to update your database.

Stopword list changes will not apply to searches until a full index is run.

Adjusting punctuation settings

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

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

- Punctuation is listed in the Punctuation field on the New or Modify dialog box to be indexed
- Punctuation is embedded in a string of characters

You can find what punctuation is full-text searchable in a database, when it's embedded in a string of characters, by checking the Punctuation field in the database properties dialog box. By default, Concordance includes the apostrophe, period, comma, and forward slash. You may want to add symbols like the ampersand and the at sign for e-mail databases.

Calcco V10 [X]

Concatenated databases
 C:\PROGRAM FILES\LEXISNEXIS\CONCORDANCE 10\DATABASE\CALFCO

Description
 [Empty text box with up/down arrows]

Documents	25	Operator	ADJ	Punctuation	-,.,'
Dictionary words	2,552	Quote	"	Empties	Show
Stopwords	141	Wildcard	*	Memory	1,217,859,584

Home directory
 [Empty text box] [Browse...]

Users logged in
 UserName Tue Apr 06 07:24:22 2010

[OK]

Examples: Embedded Punctuation

- AOL.com and NETSCAPE/AOL – Allows you to search on these terms because the entries relate to a case regarding Internet browsers.
- D'Arcangelo – The apostrophe is embedded because of the surname spelling. People mentioned in case records may have possessive apostrophes embedded in their names and may be added to the list because the name is searched often.
- john.smith@organization.com – The period and at sign are both examples of embedded punctuation within an e-mail address.

To adjust punctuation settings:

1. On the **File** menu, click **Modify** to open the **Modify** dialog box.

Field Name	Type	Length
BEGNO	Text	15
ENDNO	Text	15
DOCDATE	Date	MMDDYYYY
DOCTYPE	Paragraph	
DOCTITLE	Paragraph	
AUTHOR	Paragraph	
AUTHORORG	Paragraph	
RECIPIENT	Paragraph	
RECIPORG	Paragraph	
CC	Paragraph	
SUMMARY	Paragraph	
CONDITION	Paragraph	
ATTACH_TYPE	Paragraph	
LEAD_DOC	Paragraph	
PRIMARYDATE	Date	MMDDYYYY
PAGES	Numeric	20.0
ATTYNOTES	Paragraph	
REVIEWSTATUS	Paragraph	
OCR1	Paragraph	
OCR2	Paragraph	
ISSUE	Paragraph	
DISC STATUS	Paragraph	

Status
 Documents: 203
 Fields: 32

Punctuation: ./,; '@&

Name: BEGNO
Type: Text
Length: 15
Places:
Format:

☒ Image ☒ Key ☐ Accession
☐ System ☐ Indexed

Buttons: New, Insert, Delete, Save To File, Append Equivio Fields, OK, Cancel

2. In the **Punctuation** field, add or delete the applicable punctuation.
3. Click **OK** to save your changes.
4. Run a full index to update the database dictionary with the punctuation changes.

Reviewing the dictionary

In Concordance, a word is any string of characters. A word can be a series of numbers or a combination of letters, numbers and even punctuation or symbols. Familiarize yourself with your database dictionary by reviewing or printing the entries.

- ✍ The maximum length of a dictionary word is 64 characters. When a word exceeds 64 characters, only the first 64 characters of the word are included in the dictionary. Since the full word is not listed in the dictionary, the word may not be found in the database.

For example, creating a word that includes the file name and path can create a word longer than 64 characters that is not found in the database.

You can review dictionary entries in three areas:

- The database properties dialog box displays the number of words included in your dictionary and the punctuation that is indexed.

Calco V10

Concatenated databases
C:\PROGRAM FILES\LEXISNEXIS\CONCORDANCE 10\DATABASE\CALCO

Description

Documents 25
Dictionary words 2,552
Stopwords 141

Operator ADJ
Quote "
Wildcard *

Punctuation -/,,'
Empties Show
Memory 1,217,859,584

Home directory
Browse...

Users logged in
UserName Tue Apr 06 07:24:22 2010
OK

- The Dictionary dialog box accessed from the File menu provides a complete listing of all the words included in the dictionary, the number of documents each word appears in, and how many word hits there are for each word in the dictionary.

To search for a word in the dictionary, type all or part of the word in the field below the word list.

Dictionary

Word	Hits	Docu...
APPARENT	1	1
APPARENTLY	2	2
APPEAL	1	1
APPEAR	9	9
APPEARED	1	1
APPEARS	592	54
APPLICABILITY	1	1
APPLICABLE	2	2
APPLICANT	6	2
APPLICANT'S	1	1
APPLICANTS	5	2
APPLICATION	2	1
APPLICATIONS	1	1
APPLIED	3	3

app

Print
From
To
Print to file ☐
Print...
OK

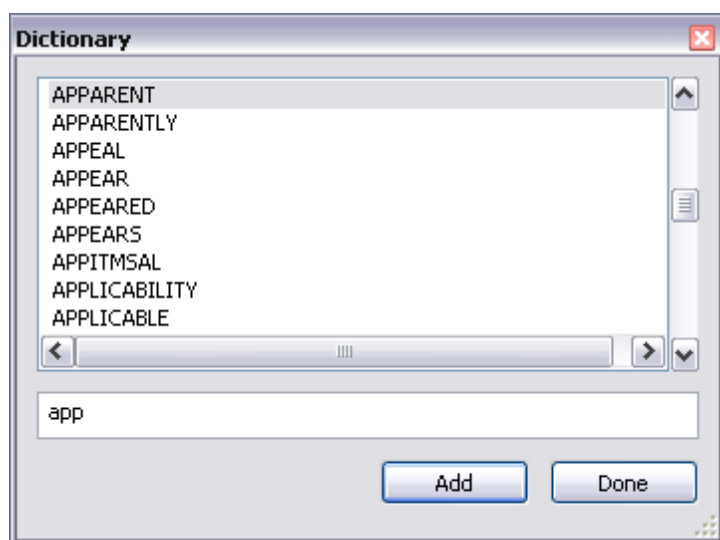
 To print the words in the dictionary:

1. On the **File** menu, point to **Dictionaries**, and then click **Database dictionary**.
2. To print a range of words, in the **From** field, type the first word in the range, in the **To** field, type the last word in the range, and click the **Print** button.

To print all words in the dictionary, leave the From and To fields blank, and click the Print button.

To print the dictionary words to a .txt text file, select the Print to file check box before clicking the Print button.

- The Dictionary dialog box accessed from the Search pane allows reviewers to select words from the dictionary and add them directly into search logic in the Advanced Search panel.



Importing Files

About importing files

Once you have created a database, you can start importing load files to populate the database with records. Your initial database files can be PST files, electronic documents, or delimited text files prepared by a vendor (or other party) so that you can import them directly into Concordance. Concordance provides the Import Wizard to help you import your documents.

Most files are imported into Concordance using the Import menu on the Documents menu. From the Import menu, you can import the following types of files:

- Delimited text files
- OCR files
- Native files
- Image files
- Electronic documents

- Emails and attachments
- Transcripts
- Concordance databases

After importing your files, it is best practice to check for inconsistencies between the database imagekeys and entries in the Concordance Image .dir file and for duplicates and gaps in the database.

Supported E-Document file types (Concordance v10.21)

Concordance v10.21 supports the following E-Document file types for creating and adding documents to an E-Documents database:

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

Concordance integrates with many e-discovery products so you can import and export data to and from other prominent industry software applications.

- LAW PreDiscovery extracts text content and metadata from electronic files in native file format, and scans and exports data directly into databases.
- EnCase® by Guidance Software is an enterprise forensic data collection application used to gather data from LANs and individual, custodian hard drives, and can export collected data directly into databases.

- IPRO Image by IPRO Tech, Inc. can create Concordance image load files.

For more information about other product integrations, see [About Concordance](#).

About delimiter characters

The following four columns represent the available delimiter characters. For each delimiter, the displayed symbol is on the left and the decimal equivalent is in parenthesis on the right. If the source program you are importing from uses a different font, it can change the symbolic representation of the delimiters. If this happens, match the delimiter characters with the decimal equivalents instead of relying on the displayed symbol. Using the decimal equivalents will always result in a correct delimiter match.

¡ (001)	- (045)	' (180)	Ú (218)
¬ (002)	. (046)	µ (181)	Û (219)
 (003)	/ (047)	¶ (182)	Ü (220)
 (004)	: (058)	· (183)	Ý (221)
(005)	; (059)	 (184)	Þ (222)
- (006)	< (060)	 (185)	ß (223)
• (007)	= (061)	 (186)	à (224)
◻ (008)	> (062)	» (187)	á (225)
(009) Horizontal Tab	? (063)	¼ (188)	â (226)
(010) Line Feed	@ (064)	½ (189)	ã (227)
(011) Vertical Tab	[(091)	¾ (190)	ä (228)
(012) Form Feed	\ (092)	¿ (191)	å (229)
(013) Carriage Return	] (093)	À (192)	æ (230)
(014) SO	^ (094)	Á (193)	ç (231)
ø (015)	_ (095)	Â (194)	è (232)
† (016)	 (096)	Ã (195)	é (233)
◀ (017)	{ (123)	Ä (196)	ê (234)
‡ (018)	(124)	Å (197)	ë (235)
‡ (019)	} (125)	Æ (198)	ì (236)
¶ (020)	~ (126)	Ç (199)	í (237)
⊥ (021)	ı (161)	È (200)	î (238)
⊥ (022)	¢ (162)	É (201)	ï (239)
⊥ (023)	£ (163)	Ê (202)	ð (240)
↑ (024)	¤ (164)	Ë (203)	ñ (241)
⊥ (025)	¥ (165)	Ì (204)	ò (242)
→ (026)	¦ (166)	Í (205)	ó (243)
← (027)	§ (167)	Î (206)	ô (244)
! (033)	¨ (168)	Ï (207)	õ (245)
" (034)	© (169)	Ð (208)	ö (246)
# (035)	ª (170)	Ñ (209)	÷ (247)
\$ (036)	« (171)	Ò (210)	ø (248)
% (037)	¬ (172)	Ó (211)	ù (249)
& (038)	- (173)	Ô (212)	ú (250)
' (039)	® (174)	Õ (213)	û (251)
((040)	¯ (175)	Ö (214)	ü (252)
) (041)	° (176)	× (215)	ý (253)
* (042)	± (177)	Ø (216)	þ (254)
+ (043)	² (178)	Ù (217)	ÿ (255)
, (044)	³ (179)		

Importing delimited text files

Load files or delimited text files typically have extensions ending in .dat, .csv, or .txt. Each file contains record metadata, but some may also include body text. We recommend having your OCR separated into individual text files and imported separately using a CPL script.

As an administrator, you should always make a practice of opening and reviewing your

delimited text files when you receive them, as the files are not always prepared perfectly and may need to be modified.

Before importing delimited text files into Concordance, be sure to review the Managing data files topic.

Review and Edit Delimited Text Files:

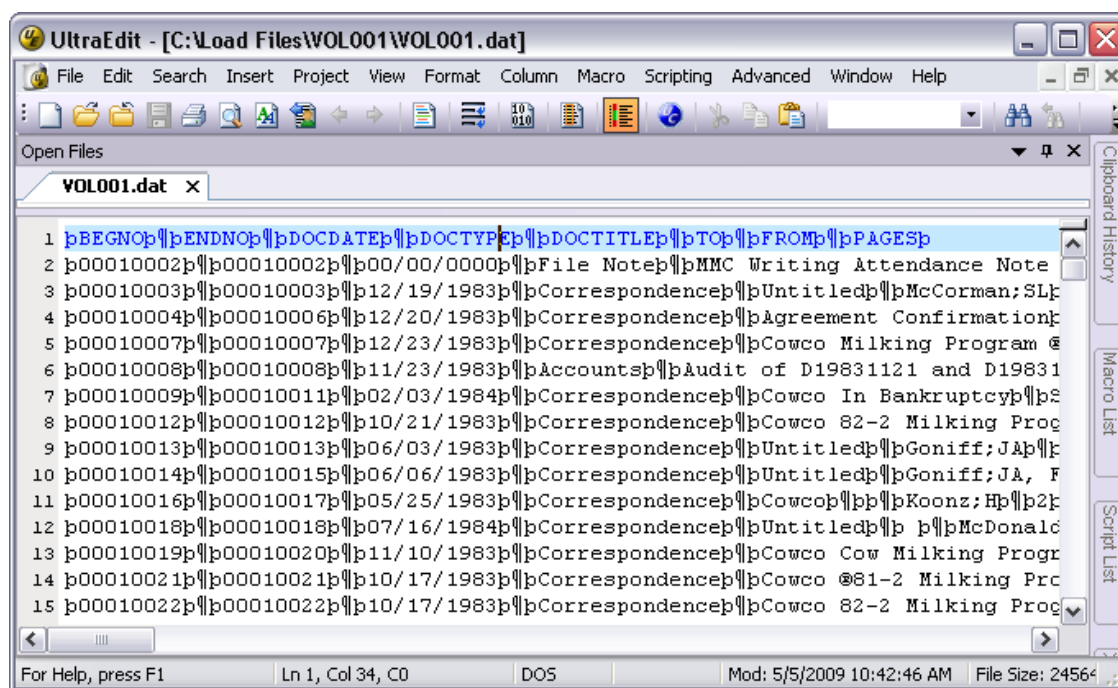
Before importing a delimited text file into a Concordance database, review the delimited text file, and make any necessary corrections.

To review and edit a delimited text file:

1. Open the delimited text file in any text editor program.

 Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

Below is an example of a delimited text file opened in UltraEdit:



2. Review the delimited text file for the following elements:

- The file must be a text-based format with an extension of .dat, .csv, .txt, .rtf, or any normal text file extension.
- If there is not a header row containing field names, open the associated .tif file for the first record and match the data in the record to the data in the .tif file.
- Note the delimiters used in the file. Concordance can handle any standard text delimiters.

- Note the date format used in the file. Concordance can load dates containing slashes in any order with either 2- or 4-digit years, with a maximum of 8 digits. The only date formats Concordance can load without slashes is the universal date format of YYYYMMDD and the mm-dd-yyyy date format with dashes.
 - Check the final line number for your last record to note the number of records expected to be added to the database. Subtract header row if the Skip first line option is checked during import.
 - Is there a carriage return at the end of the record? If not, add a carriage return at the end of the record. Concordance will not load the last record if the carriage return at the end of the record is missing.
3. Make the necessary edits, if applicable.
 4. Save the file.

Load a delimited text file:

When importing delimited text files, there are two wizard options to import the files:

- **Create New Database** - use when creating a new database, the Import Wizard guides you through creating a new database and the import process. See Using the database creation wizard.
- **Update Current Database** - use when importing the files into the current database structure, the Overlay Wizard guides you through importing the data.

When working with an existing database structure, you can also manually import the data using one of the following options in the Import dialog box:

- **Import dialog box** - loads the data from the delimited text files into new records in the database.
- **Overlay dialog box** - loads the data from the delimited text files into the current database records, replacing existing data.

 When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When importing a delimited text file using the Load option, records with mismatched fields are appended as new documents to the main database, which is the first database in the concatenated set. However, when using the Overlay option, importing records with mismatched fields can cause a loss of data.

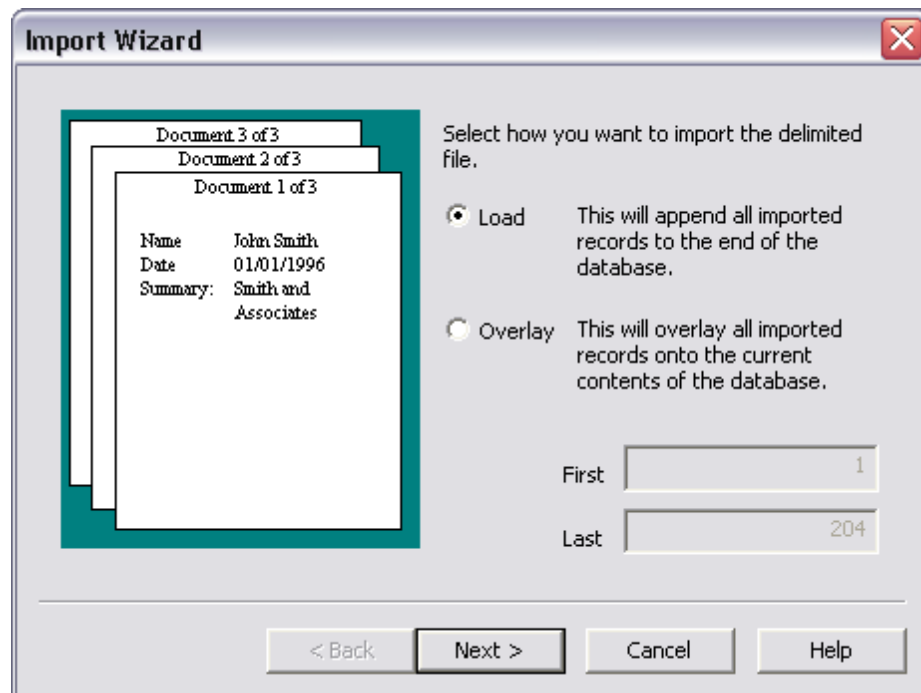
 Instead of using Import or Overlay dialog box to overlay records, we suggest using the matching import process instead. For more information, see Loading additional data into databases.

To import delimited text using the Overlay Wizard:

1. On the **Documents** menu, point to **Import**, and then click **Delimited text**.



2. Select **Overlay Wizard** and click **OK**.



3. Do one of the following:
 - To append all imported records to the end of the existing database records, click **Load**.
 - To replace existing records in the database with the imported records, click **Overlay**.

The Overlay option allows you to specify a range of records for overlaying. All of the data in the delimited text file is loaded into the documents in the current query. Documents can be overlayed in sorted order too. Just sort the query before clicking Overlay. If you want to replace specific records by matching field values, then you should import a Concordance database. For more information, see Importing Concordance databases.

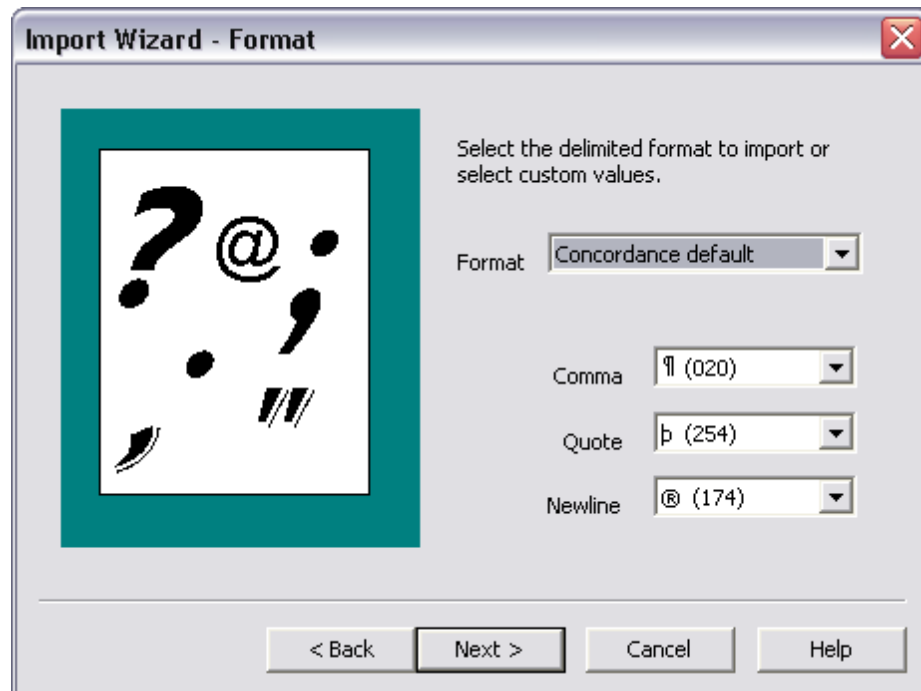
If you are using the Overlay option, and the delimited text file contains more records than the query, the additional records are appended to the database as new documents.

In the First field, type the first document number in the query to overlay.

In the Last field, type the last document number in the query to overlay.

By default, all documents in the current query are overlaid.

4. Click **Next** to open the **Import Wizard - Format** dialog box.



Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Format field defaults to Concordance default.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

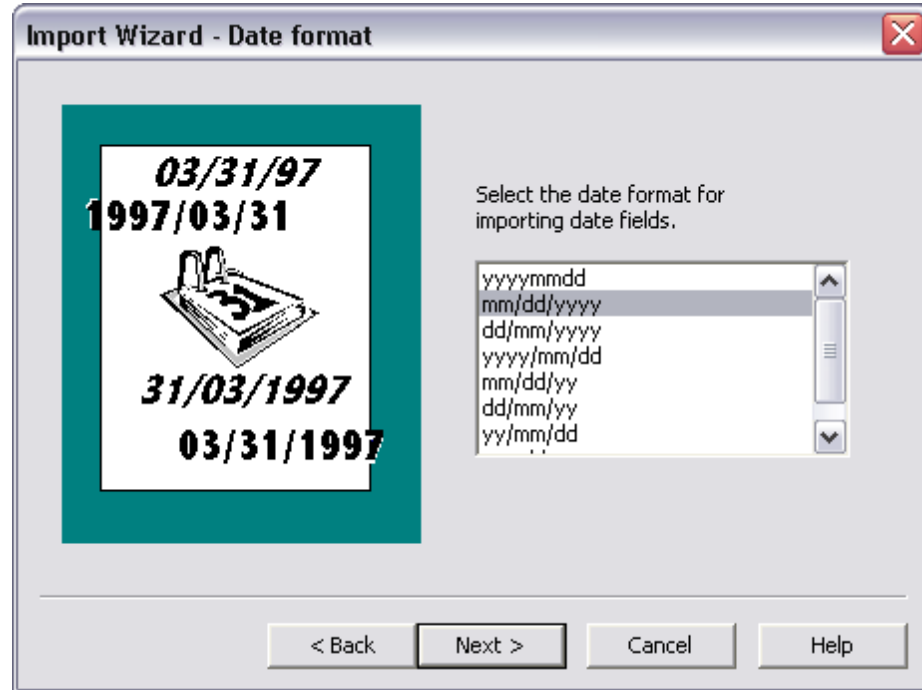
The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

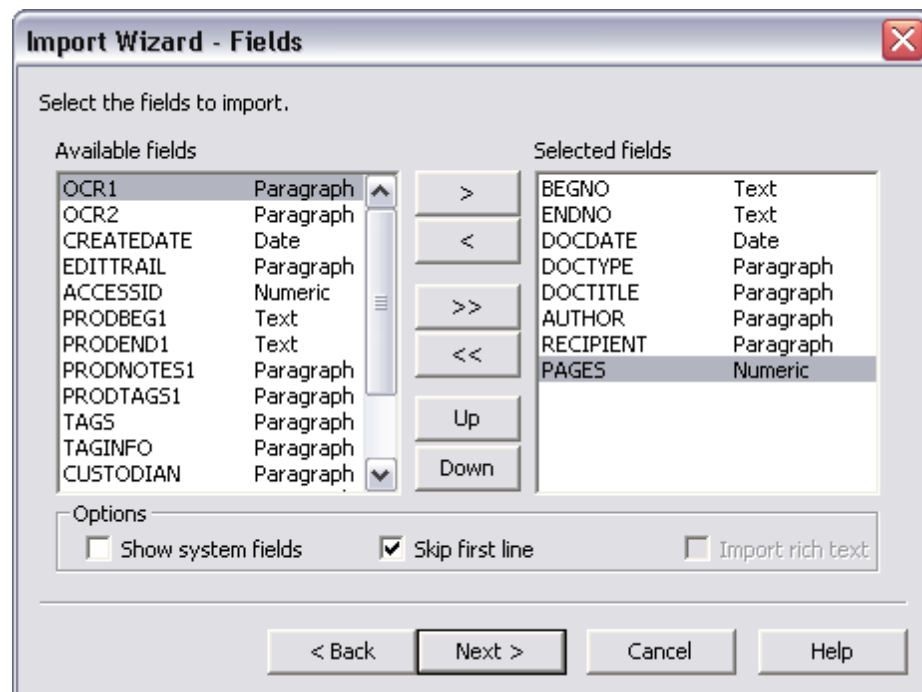
The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

5. Click **Next** to open the **Import Wizard - Date Format** dialog box.



6. Select the date format that matches your delimited text file.
7. Click **Next** to open the **Import Wizard – Fields** dialog box.



By default, all of the database fields are added to the Selected fields list for the import.

8. To only select some of the fields for the import, click the double arrow (<<) button to move all the fields to the **Available fields** list.
9. In the **Available fields** list, select the fields you want to include in the import, and click the right arrow (>) button to add the fields to the **Selected fields** list.
10. Once you have added the applicable fields to the **Selected fields** list, use the **Up** and **Down** buttons to make the field order match the field order of your delimited text file.

The field order in the Selected fields list, must match the field order of your delimited text file.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance properly.

11. To display hidden system fields, select the **Show system fields** check box.

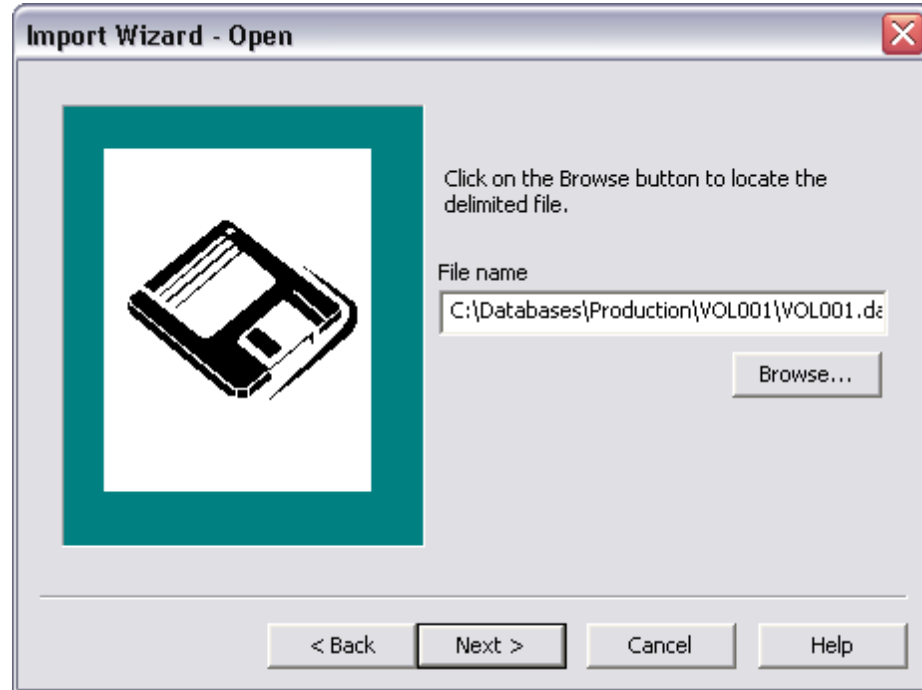
System fields are fields used by Concordance to administer database functions, such as replication. They are generally not visible, but you can display and import them if you select the Show system fields check box.

12. To prevent Concordance from creating a record for your field name row, select the **Skip first line** check box. then click **Next**.

Sometimes the first line of a data file contains a list of the field names in the database, with each field name taking the place of the data for that record. When you select the Skip first line check box, Concordance ignores that line of data during the import.

Full-text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. Delimited text files with rich text are automatically recognized by the Import Wizard. Concordance automatically selects the Import rich text check box when applicable.

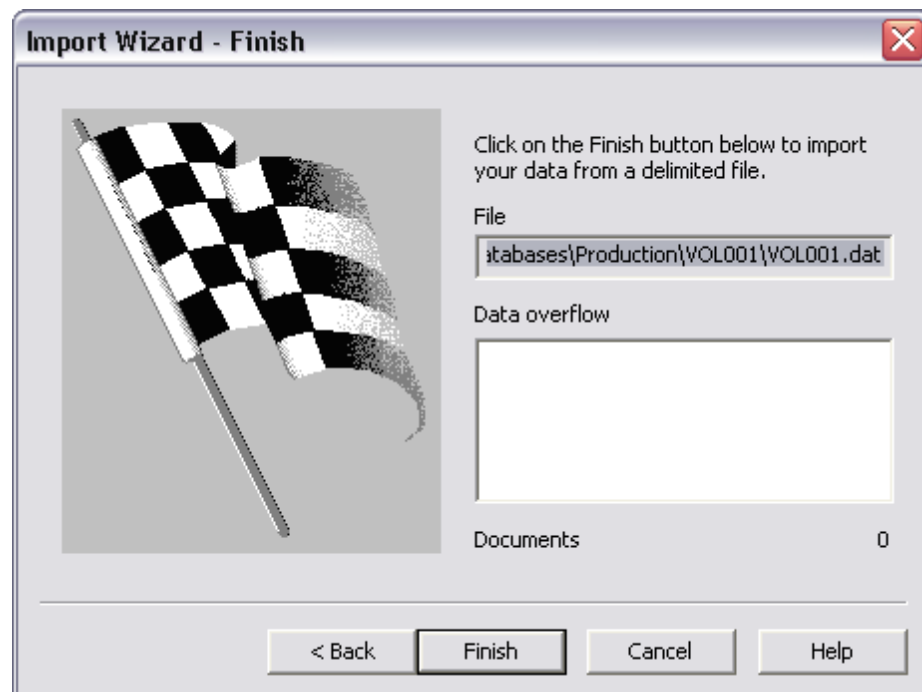
13. Click **Next** to open the **Import Wizard - Open** dialog box.



14. Click the **Browse** button, navigate to and open the delimited text file you want to import into the database.

The delimited text file's path and file name is displayed in the File name field.

15. Click **Next** to open the **Import Wizard – Finish** dialog box.



16. Click **Finish** to import or overlay the delimited text file.

When the delimited text file is imported, the number of documents that successfully loaded is displayed in the Documents field. Verify that your record numbers match.

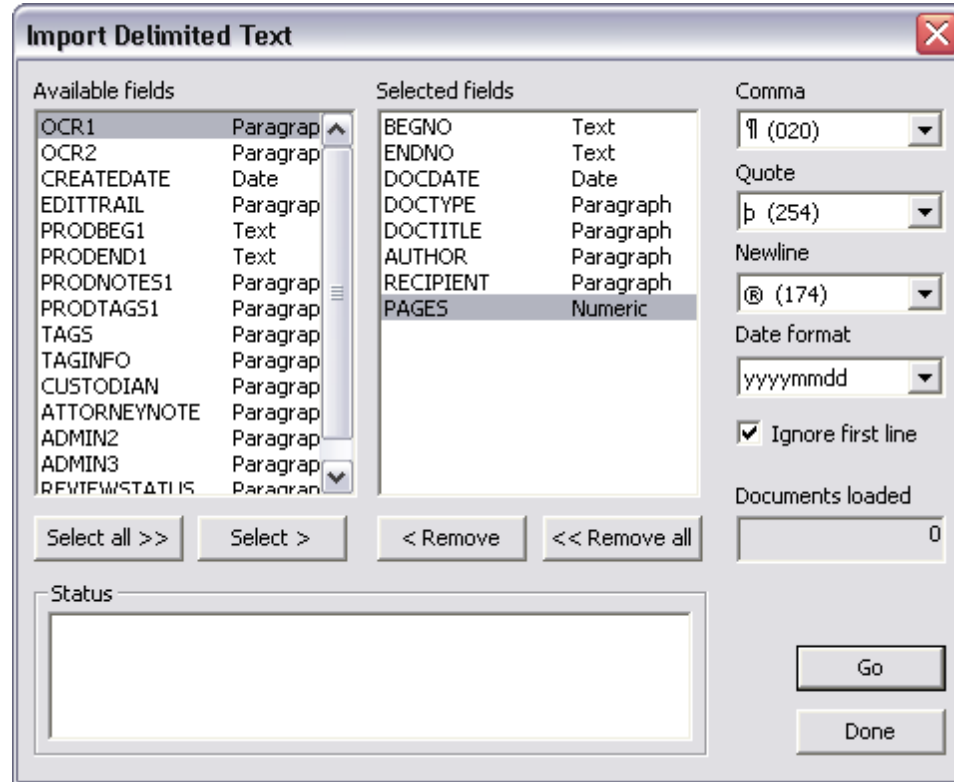
If there is any data overflow during the import, the Data overflow field displays the line numbers on which the overflow errors occurred in the delimited text file.

 To import a delimited text file using the Import dialog box:

1. On the **Documents** menu, point to **Import**, and then click **Delimited text**.



2. Select **Import dialog box** and click **OK**.



3. In the **Available fields** list, select the fields you want to include in the import, and click the **Select** button to add the fields to the **Selected fields** list.

The field order in the Selected fields list, must match the field order of your delimited text file.

To change the order of the fields in the import, click the Remove all button to add all the fields to the Available fields list and then add each field to the Selected fields list in the order you want the fields to be listed.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance properly.

To remove a field from the Selected fields list, select the field and click the Remove button.

Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

4. In the **Date format** field, select the date format that matches your delimited text file.

Sometimes the first line of a data file contains a list of the field names in the database, with each field name taking the place of the data for that record.

5. Select the **Ignore first line** check box if the first row in your delimited text file is a field

name row, and you want Concordance to ignore the field name row during the import.

Clear the check box if you want Concordance to create a record for the first line of your delimited text file.

6. Click the **Go** button to open the **Load delimited file** dialog box.
7. Navigate to and open the delimited text file you want to import into the database.

When the delimited text file is imported, the number of documents that successfully loaded is displayed in the Documents loaded field. Verify that your record numbers match.

If there is any data overflow during the import, the Status field displays the line numbers on which the overflow errors occurred in the delimited text file.

8. Click the **Done** button to close the **Import Delimited Text** dialog box.

To import a delimited text file using the Overlay dialog box:

1. On the **Documents** menu, point to **Import**, and then click **Delimited text**.



2. Select **Overlay dialog box** and click **OK**.

Clicking OK opens the Overlay Database dialog box. You can also open the Overlay Database dialog box by clicking the Documents menu, pointing to Import, and then clicking Overlay.

Overlay Database

Available fields		Selected fields	
OCR1	Paragraph	BEGNO	Text
OCR2	Paragraph	ENDNO	Text
CREATEDATE	Date	DOCDATE	Date
EDITTRAIL	Paragraph	DOCTYPE	Paragraph
ACCESSID	Numeric	DOCTITLE	Paragraph
PRODBEG1	Text	AUTHOR	Paragraph
PRODEND1	Text	RECIPIENT	Paragraph
PRODNOTES1	Paragraph	PAGES	Numeric
PRODTAGS1	Paragraph		
TAGS	Paragraph		
TAGINFO	Paragraph		
CUSTODIAN	Paragraph		
ATTORNEYNOTE	Paragraph		
ADMIN2	Paragraph		
ADMIN3	Paragraph		
REVIEWSTATUS	Paragraph		

Range
First: 1
Last: 204

Comma: ¶ (020)

Quote: b (254)

Newline: ® (174)

Date format: yyyymmdd

Documents: 0

Select all >> Select > < Remove << Remove all OK Cancel

3. In the **Available fields** list, select the fields you want to include in the overlay import, and click the **Select** button to add the fields to the **Selected fields** list.

The field order in the Selected fields list, must match the field order of your delimited text file.

To change the order of the fields in the import, click the Remove all button to add all the fields to the Available fields list and then add each field to the Selected fields list in the order you want the fields to be listed.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in the Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance properly.

When importing records into a concatenated database using the Overlay Database dialog box, records are updated only when the fields of an imported record match an existing record. Databases with mismatched fields can cause a loss of data.

To remove a field from the Selected fields list, select the field and click the Remove button.

When you are running an overlay import, you can specify a range of records for overlaying in the Range section. All of the data in the delimited text file is loaded into the documents in the current query. Documents can be overlayed in sorted order too. Just sort the query before opening the Overlay Database dialog box. If you want to replace specific records by matching field values then you should import a Concordance database. For more information, see Importing Concordance databases.

If the delimited text file contains more records than the query, the additional records are appended to the database as new documents.

4. In the **First** field, type the first document number in the query to overlay.
5. In the **Last** field, type the last document number in the query to overlay.

By default, all documents in the current query are overlayed.

Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return	174

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
	linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	

The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

6. In the **Date format** field, select the date format that matches your delimited text file.
Sometimes the first line of a data file contains a list of the field names in the database, with each field name taking the place of the data for that record.
7. Click the **OK** button to open the **Overlay delimited file** dialog box.
8. Navigate to and open the delimited text file you want to overlay into the database.

Verify the Metadata

After importing a delimited text file, verify your imported delimited text files in Concordance. If you are importing a delimited text file into a new database, you will also need to index the database. If you are importing or overlaying a delimited text file into an existing database, you will also need to reindex the database.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

To verify your imported delimited text files:

1. On the **Standard** toolbar, click the **Table** button to open the **Table** view.
2. Verify the imported records are in the record listing.

If you imported records into an existing database, the new records are added after the

last existing record in the database.

3. On the **Standard** toolbar, click the **Browse** button to open the **Browse** view.
4. On the **Tools** menu, click **Empties**.

The Empties command determines whether empty fields are displayed in the Browse view. By default, Concordance does not display or print empty fields.

When you click the Empties command a check mark is displayed next to the Empties command and all fields in your database, including those not populated yet are displayed in the Browse view. Verify the field data you imported or overlayed is populated with the correct data.

To only display populated fields, click the Empties command again. When there the check mark is not displayed next to the Empties command, only the populated fields are displayed in the Browse view.

5. After verifying the imported or overlayed records, if you imported or overlayed the delimited text file into an existing database, reindex the database.

If you imported or overlayed the delimited text file into a new database, index the database.

About OCR

The body text of your records, also called OCR, can be included in a delimited text file containing field metadata, but best practice is to have a delimited text file for your metadata, and your OCR separated into individual text files.

When your OCR is placed into individual document-level text files, you can import the text into each corresponding record. The text file name must match the image key field (the BEGNO field or its equivalent) value. For example, if a text file name is *00010002.txt*, the image key field value would be *00010002*.

In the case that there are more than 12 million characters, which is the capacity of a paragraph field, the Concordance automatically overflows the text into the next available field. If you import your OCR from a delimited text file and there are more than 12 million characters in a record, then you need to separate the text within the delimited text file into multiple fields as the text truncates and will not automatically overflow during the import process.

After your metadata is imported into your Concordance database, it's time to import your record content into the body text fields. If you have already created your database, using a CPL script allows you to quickly import these text files into your database field structure by linking them with the image key field and ensuring that the correct file path is designated. Your record content from OCR files usually populates the OCR1 and OCR2 fields or their equivalents. The OCR fields are where the bulk of full-text searching is focused in Concordance.

💡 Any time you use a CPL script, it's best to download a fresh version off the Concordance product Web site at <http://lexisnexis.com/concordance/cpl-library>. Doing so ensures that any coding hasn't been compromised since the file was last copied.

Tips and Tricks for Importing OCR Files

If your OCR files aren't importing properly when using the CPL, check the following:

- Verify file names and extensions
- Consider using a renaming utility software or use a DOS batch file (.BAT extension) if the file names do not match the image key
- Check your .LOG file to verify whether each OCR file successfully loaded

 Your OCR text files can reside in the same directory as the image files. They do not need to be separated. You will need to import your OCR for each volume where it resides.

Importing OCR files

If you have already created a database and want to import the OCR text into the OCR fields, you need to run the ReadOCR.cpl.

To import OCR using the ReadOCR CPL:

1. In Concordance, on the **File** menu, click **Begin Program**.
2. In the **Open** box, browse to your CPL folder, click the **Readocr_v[version number].cpl** file, and click **Open**.

The default directory for the CPL folder installed with Concordance is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\CPL (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\CPL (Windows 7)*. For more information about CPLs, see About CPLs and readOCR1_v10.00.

Clicking Open opens the Read OCR Utility dialog box.

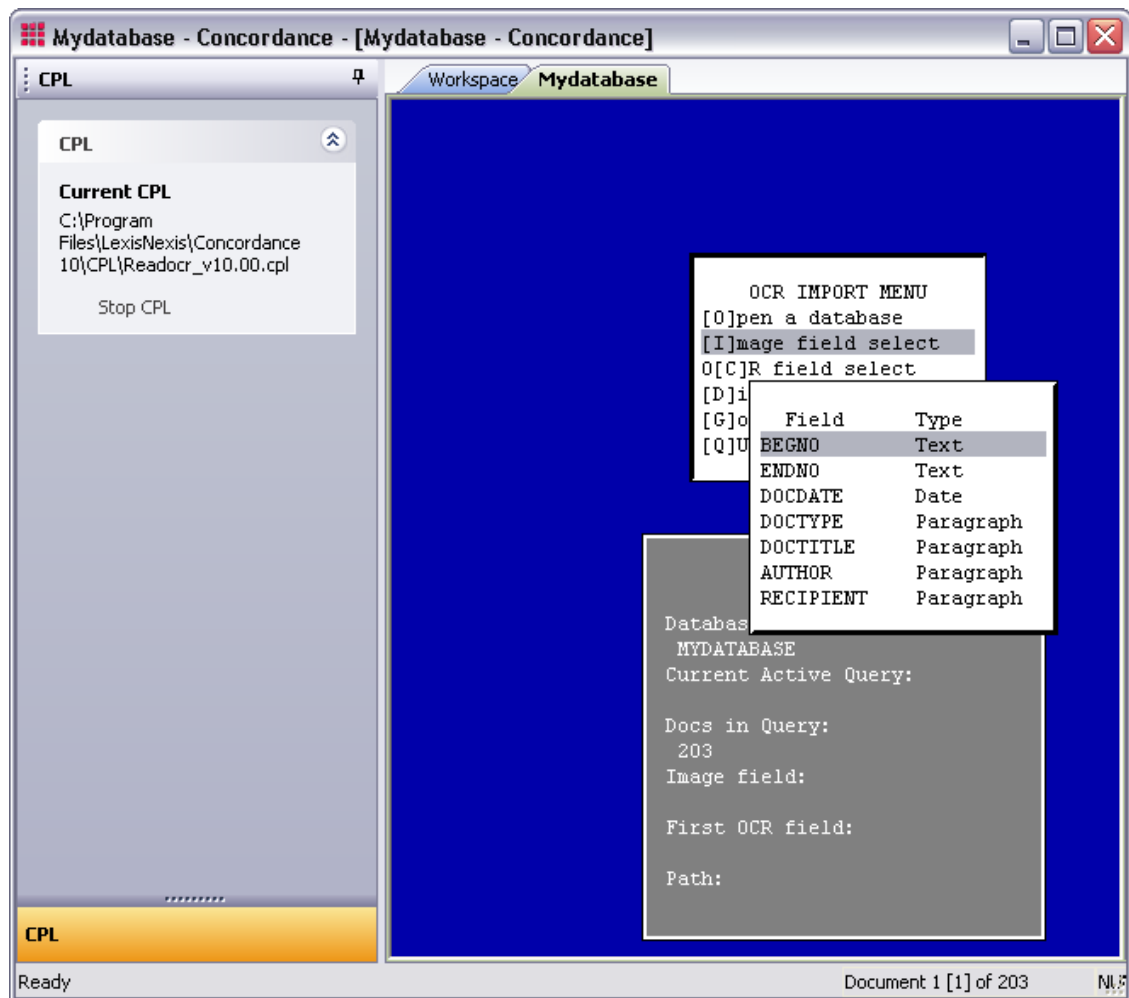


3. Click **OK**.

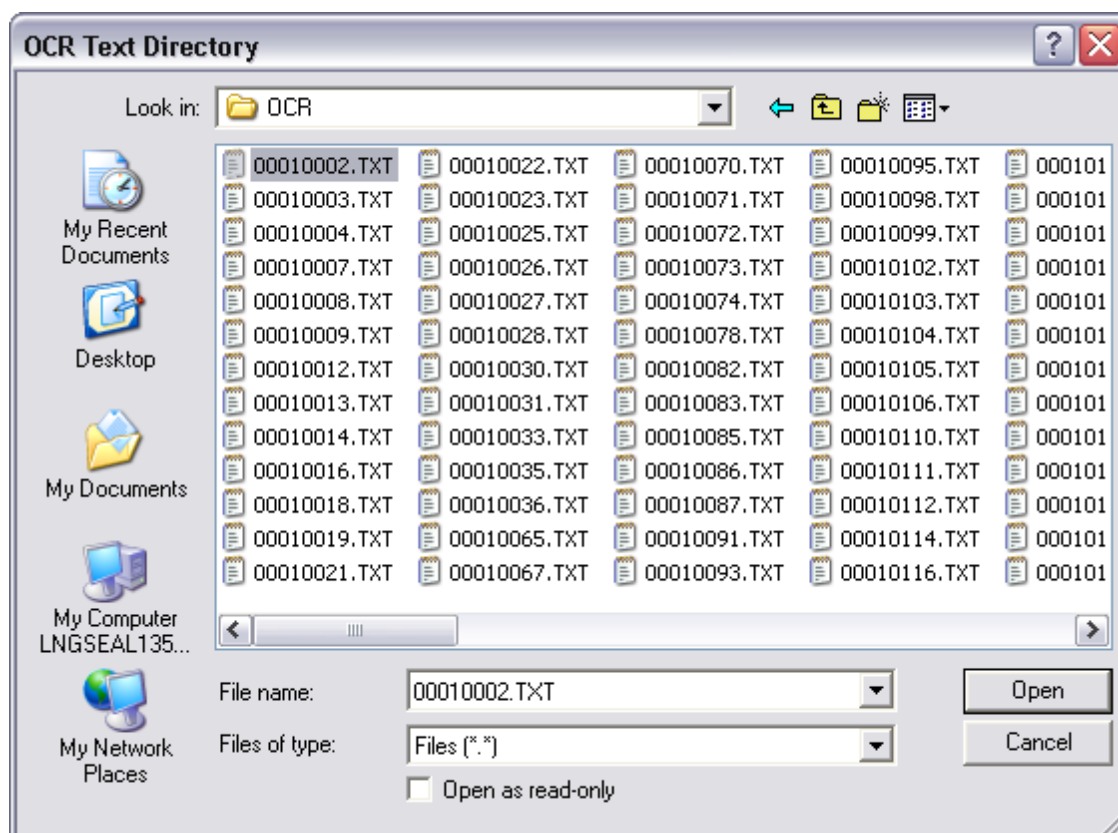
You are now viewing a blue DOS screen displaying a the OCR IMPORT MENU and the gray Status box.

Notice that the Status box displays your active database, the current active query, the number of documents in a query, an empty Image field, an empty First OCR field, and an empty Path field. Remember that CPLs work off of existing queries.

4. On the **OCR IMPORT MENU**, click **[I]mage field select**.

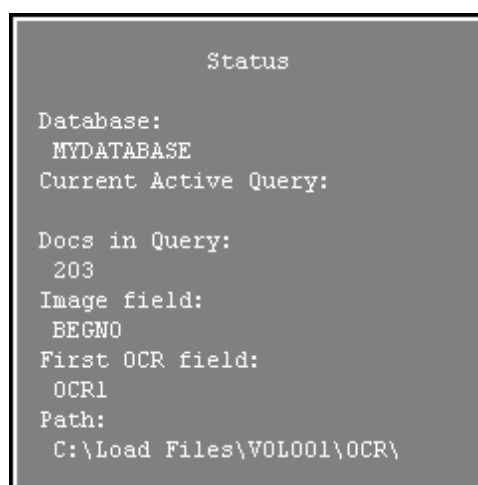


5. In the field list, click **BEGNO** or its equivalent.
BEGNO is now displayed in the in the Image field field.
6. On the **OCR IMPORT MENU**, select **O[C]R field select**.
7. In the field list, using your keyboard arrow keys locate and click the **OCR1** field.
OCR1 is now displayed in First OCR field field.
8. On the **OCR IMPORT MENU**, click **[D]irectory of OCR text**.
Clicking [D]irectory of OCR text opens the OCR Text Directory dialog box.



9. Browse to the folder containing your OCR files, click the OCR file, and click **Open**.

The path to the OCR file is now displayed in the Path field.



10. In the **OCR IMPORT MENU**, select **[G]o!** to open the **Create log file** dialog box.
11. Browse to where you want to save the OCR import .LOG log file, type the log file name in the **File name** field, and click **Open**.

Clicking Open starts the OCR import. A status bar indicating the processing time displays

during the import.

12. After the import is completed, on the **OCR IMPORT MENU**, click **[Q]uit** to exit the CPL script.

To verify the imported text:

Once you have imported your OCR files, it is best practice to verify the imported text. After verifying the imported text, you will need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. Verify that the data you just imported populated the OCR field correctly into your database records.
3. Scroll to the bottom of a record to verify the administrative fields.

Notice that the **CREATEDATE** field displays the import load date of the document. The **EDITTRAIL** field is populated with the record modification date, session and accession numbers, and the user ID of the person who last updated the file. The **ACCESSID** field displays the load order number of the document.

If you have corresponding OCR for every record and need to verify whether all text was loaded into the OCR1 fields, then use a relational search to ensure that every field was populated.

4. Run an empty OCR field search.

To do this, type `OCR1 = ""`. The search provides query results on all OCR1 empty fields. You should receive the, "No documents found in current query" message if all documents loaded properly.

5. Run a populated OCR field search.

To locate specific paragraph fields that are populated, you can also run the relational search of `[fieldname] = *`. You should receive query results for all documents that have this field populated with any value.

6. If you have already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see *Indexing and reindexing updates*.

If you get a message prompt stating, Dictionary file exists, overwrite?, click Yes.

Loading files for Concordance Native Viewer

For the discovery process, it is common practice to pre-process documents, by converting them to image files for review. However, it is often more desirable to review certain documents in their native format. Concordance Native Viewer provides access to both native files and images within one application, thus speeding up the review process.

Concordance Native Viewer opens a near native view of the document including images, layout and more. The near native view can be reviewed, redacted, and marked-up for production.

When importing native documents into Concordance for viewing in Concordance Native Viewer, it's best to create a new database. The database must contain a valid media (image) key and file path field. The media (image) key field is used to link the Concordance database with Concordance Native Viewer. The filepath field stores the path to the native document.

📍 (Concordance version 10.20 and earlier) When importing a multi-page image file, make sure that the file is formatted as a .tif file (.tif formatted files are the only image type file that recognizes document breaks). All other image formatted files (.jpg, .bmp, .gif, etc.) can only be imported as a single-page single image file. For example, a document with three pages for a single Concordance record should be loaded as a .tif formatted file in order for CNV to display all three pages. If you load separate .jpg files for each page of the document, Concordance Native Viewer will only display the first .jpg file as only one .jpg file can be associated with a record.

✍️ (Concordance version 10.20 and earlier) When creating a new database, the OPT file must be stored in the same folder as the Concordance database file (.dcb) to create the CIB file. If the database folder contains an existing CIB file, you need use the Image Base Management tools to load the OPT file.

Concordance imagebase load file formatting

A load file (.opt, .log, .txt) format is a delimited ASCII file containing all information necessary to insert links into the imagebase. The load file consists of seven delimited entries. Reference the following table and examples when formatting images.

Image Load Files	
Format	Description
ALIAS	Should match your media (image) key from the Concordance database. Concordance stores this key in order to reference the image. Media keys are case-sensitive.
VOLUME	Name of the volume where the documents and image reside, typically the volume name of a CD or DVD server.
PATH	Full path and file name (and extension) of the image.
DOC_BREAK	Enter a Y to denote whether this image marks the beginning of a document.
PAGES	Number of pages associated with the document or image
Character	Description
Y	First page of a document

Image Load Files	
Format	Description
Comma (,)	Indicates a page break or pages

Example: Concordance Native Viewer format for single-page files

```
00010002,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010002.tif,Y,,,1
00010003,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010003.jpg,Y,,,1
00010004,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010004.gif,Y,,,1
00010005,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010005.tif,Y,,,
00010006,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010006.tif,Y,,,
```

Example: Concordance Native Viewer Format for Multiple-Page files

```
00010036,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010036.pdf,Y,,,1
00010065,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010065.tif,Y,,,2
00010067,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010067.doc,Y,,,3
00010070,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010070.pdf,Y,,,1
00010071,NROTEK001,C:\MY_DATABASES\NROTEK001\001\00010071.pdf,Y,,,1
```

 A load file does not necessarily need the volume name, but still needs the parameter for the volume name (the commas). Example format: Imagekey/Alias,Volume Name,Pathname,Doc Break,Folder Break, Box Break, Page Count - without the VOL name would look like this: 0000001,,D:\VOLO001\001\0000001.tif,Y,,,1

 A document or image media key and file path cannot contain a comma (,) when loading documents and images for Concordance Native Viewer. The comma is used as a delimiter in the exported OPT file.

Unique Identifier (Media Key)

Your load file format's alias (media key) should match your image key from the Concordance database. Concordance stores this key in order to reference the image.

 The alias in your load file matches the database field that has the Image check box selected on the Modify dialog box for the database in Concordance. For more

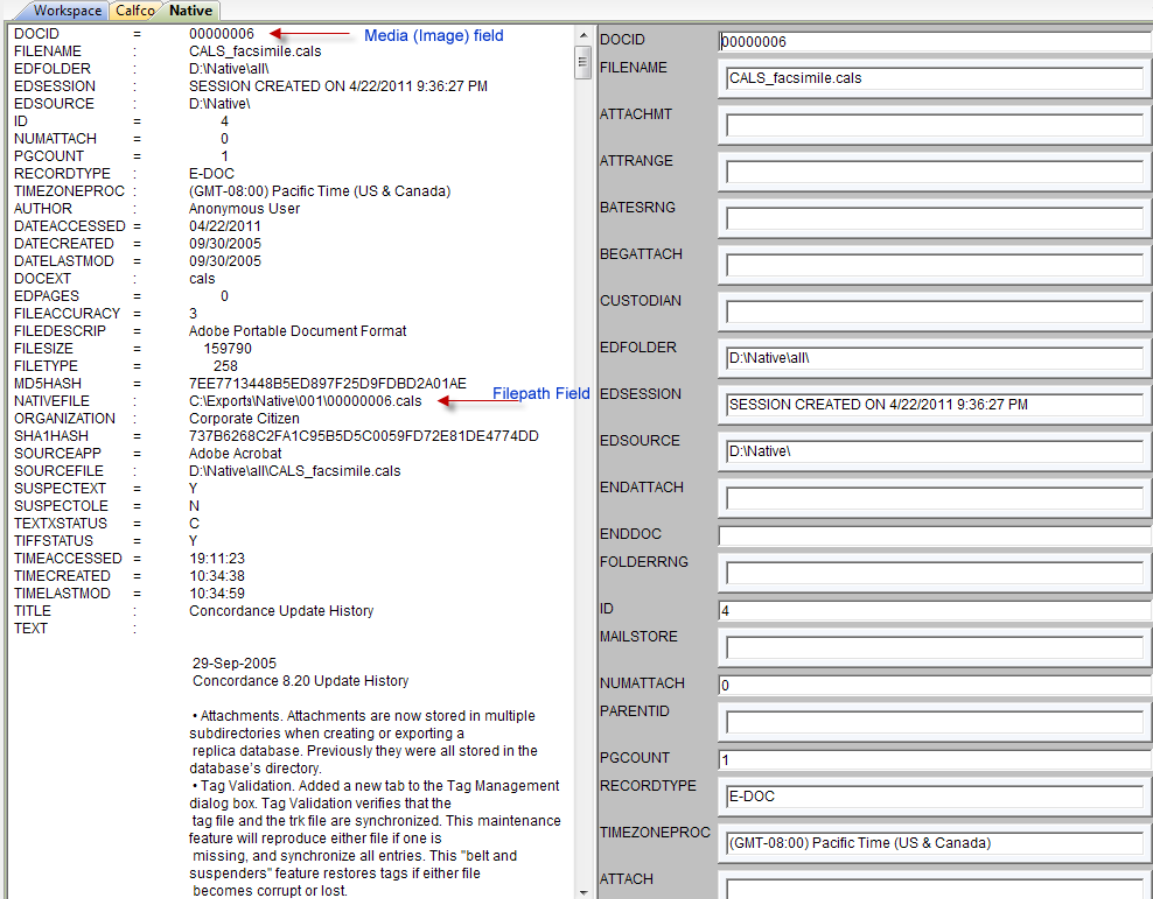
information about the Image check box, see About fields.

✎ Concordance Native Viewer will not load documents and images if the media (image) key contains over 1000 characters.

⚠ A document or image media key and file path cannot contain a comma (,) when loading documents and images for Concordance Native Viewer. The comma is used as a delimiter in the exported OPT file.

To importing opt files for use in Concordance Native Viewer:

1. In Concordance, create the database you want to use with Concordance Native Viewer. For information on creating a database, see Creating native file databases.



Field	Value
DOCID	00000006
FILENAME	CALS_facsimile.cals
EDFOLDER	D:\Native\all
EDSESSION	SESSION CREATED ON 4/22/2011 9:36:27 PM
EDSOURCE	D:\Native\
ID	4
NUMATTACH	0
PGCOUNT	1
RECORDTYPE	E-DOC
TIMEZONEPROC	(GMT-08:00) Pacific Time (US & Canada)
AUTHOR	Anonymous User
DATEACCESSED	04/22/2011
DATECREATED	09/30/2005
DATELASTMOD	09/30/2005
DOCEXT	cals
EDPAGES	0
FILEACCURACY	3
FILEDESCRIP	Adobe Portable Document Format
FILESIZE	159790
FILETYPE	258
MD5HASH	7EE7713448B5ED897F25D9FDBD2A01AE
NATIVEFILE	C:\Exports\Native\0011000000006.cals
ORGANIZATION	Corporate Citizen
SHA1HASH	737B6268C2FA1C95B5D5C0059FD72E81DE4774DD
SOURCEAPP	Adobe Acrobat
SOURCEFILE	D:\Native\all\CALS_facsimile.cals
SUSPECTEXT	Y
SUSPECTOLE	N
TEXTXSTATUS	C
TIFFSTATUS	Y
TIMEACCESSED	19:11:23
TIMECREATED	10:34:38
TIMELASTMOD	10:34:59
TITLE	Concordance Update History
TEXT	29-Sep-2005 Concordance 8.20 Update History • Attachments. Attachments are now stored in multiple subdirectories when creating or exporting a replica database. Previously they were all stored in the database's directory. • Tag Validation. Added a new tab to the Tag Management dialog box. Tag Validation verifies that the tag file and the trk file are synchronized. This maintenance feature will reproduce either file if one is missing, and synchronize all entries. This "belt and suspenders" feature restores tags if either file becomes corrupt or lost.

2. Review the OPT file to make sure that the data contains a valid media (image) alias and file path for each document or image.
3. When finished, on the **Dynamic** toolbar, click the **View Image** (Camera) button.
4. In the **Exported Load File** section of the **Imagebase Conversion Source Selection** dialog box, select the OPT file, and then click **Convert**.
5. If no errors are found, Concordance Native Viewer automatically opens and displays the

document or image associated with the current record displayed in Concordance.

Loading additional OPT files for CNV

The Concordance Image Base (.CIB) file for Concordance Native Viewer links native documents and images with their corresponding records in Concordance. An OPT file is used to import the document and image information into the CIB file. Once a CIB file is created for a Concordance database, you can view the referenced documents and images in Concordance Native Viewer.

If you have an existing CIB file and receive additional files for the database, you can use the Image Base Management tools in Concordance to load the new files and OPT file to the CIB without affecting the current records or any markup that have been applied.

The OPT file can contain both documents and images that are either single-page or multiple-page files and each file must contain a unique ID (media key). Before loading an OPT file, make sure that it provides: an image alias (media key), volume, file name and path, and page break.

💡 When importing a multi-page image file, make sure that the file is formatted as a .tif file (.tif formatted files are the only image type file that recognizes document breaks). All other image formatted files (.jpg, .bmp, .gif, etc.) can only be imported as a single-page single image file. For example, a document with three pages for a single Concordance record should be loaded as a .tif formatted file in order for CNV to display all three pages. If you load separate .jpg files for each page of the document, Concordance Native Viewer will only display the first .jpg file as only one .jpg file can be associated with a record.

Typically, the vendor who processed your documents supplies you with a corresponding load file (.opt, .log, or .txt) along with your documents and images. If you do not receive this file, you can still load your document and images into Concordance and then use the Tools > Export > Concordance Native Viewer command to create an OPT file to use.

Since your document and image files and image load file are typically provided by a vendor on a CD or DVD, the path information listed could be written in the D:\ drive and will need to be changed. You can provide the vendor with a specified directory path in advance if you already have a designated location for your images. If not, you can change the directory information yourself. See, Renaming file paths and folders.

Before you load any additional OPT files, make sure that your review the file to ensure it meets the specifications for formatting. For more information, see Concordance imagebase load file formatting.

To load additional .opt files:

1. In **Concordance**, on the **File** menu, click **Administration > Image Base Management**.
2. In the **Image Base Management** dialog box, click the **Browse** button.
3. Locate and select the .CIB file you want to add the new documents and images, and then click **Open**.
4. In the **Image Base Management** dialog box, click the **Load/Update OPT to CIB** button.

5. Locate and select the load file you want to add, and then click **Open**.

The Load OPT dialog box opens and monitors the load progress. If there are no errors loading the file the dialog box automatically closes.

 Successfully loaded OPT files are renamed to *filename.Imported_opt* in the directory folder where the .opt file was loaded.

6. For each OPT file you want to load for the selected CIB file, repeat steps 4 and 5.
7. When finished, in the **Image Base Management** dialog box, click the **Rename Media Paths and Folders** button and verify the file paths are correct.

The current file paths are listed at the top of the Rename Media Paths and Folders dialog box.

8. When finished, in **Concordance**, click the Camera button to view the newly added documents and images.

 We recommend that you take some time to experiment with loading an image file and practice edits or repairs to it so you become adept at identifying and fixing any corruption yourself. Most technical support calls for this phase of administration are due to an incorrect file path.

Loading image files for Concordance Image

Image files are the original record scanned into a file format that is viewable in Concordance Image. Typically, the vendor who processed your documents supplies you with a corresponding image load file along with your images. If you do not receive this file, you can still load your images. However, having the image load file is recommended.

Image files can be paper documents that are scanned, or e-mail or native documents that are also processed. Your images can be single-page or multiple-page files and are usually named with your image alias. We recommend using single-page TIF files because the images load faster for review and are easier to work with if you need to adjust document breaks.

Your corresponding image load file provides an image alias, volume, file name and path, page break, box break, and page count information. These files are usually in .opt, .log, or .txt file formats.

Since your image files and image load file are typically provided by a vendor on a CD or DVD, the path information listed could be written in the D:\ drive and will need to be changed. You can provide the vendor with a specified directory path in advance if you already have a designated location for your images. If not, you can change the directory information yourself.

Two ways you can change a directory file path for images

- Directly within the image load file (recommended)
- In Concordance Image after loading the file information

Both directory file path changes are made with a simple search and replace. Once you have moved your images from the CD or DVD to the server, this directory is what you want to place in the image load file or in Concordance Image. You can edit the file path before or after the import process.

What a Concordance Image record profile includes

- Up to 16,770,266 images per document
- Up to 536,870,912 volumes
- Can open .tif, .jpeg, .bmp, .gif, etc. Concordance Image cannot open PDF files.
- Image key: Value in the image field, if it matches the file name
- Image alias: Value in image field, when different than image file name
- Combined length of the image key, plus the file name and path must not exceed 1001 characters

Concordance Image Guidelines

- TIF and OCR text files can be stored in the same folder
- All TIF files from the same document do not have to be in same volume
- If you do not have a Concordance database with document breaks, you will need to use a load file with document breaks, or set them manually in Concordance Image

Imagebase Component Files	
File	Description
.dir	Imagebase that stores image keys (aliases)
.vol	Tracks volumes, must be in same directory location and saved with the same name as the .dcb file
Database-Redlines.dcb	Stores all marks made on images including type, location, color, and user
.log	Exported image load file from existing imagebase

Concordance Image Formatting

The Concordance Image load file format is a delimited ASCII file containing all information necessary to insert links into the imagebase. The load file consists of seven delimited

entries. Reference the following table and examples when formatting images.

Image Load Files	
File	Description
ALIAS	Should match your image key from the Concordance database. Concordance stores this key in order to reference the image.
VOLUME	Name of the volume where the image resides, typically the volume name of a CD or DVD server.
PATH	Full path and file name (and extension) of the image
DOC_BREAK	Enter a Y to denote whether this image marks the beginning of a document.
FOLDER_BREAK	Enter a Y to denote whether this image marks the beginning of a folder break.
BOX_BREAK	Enter a Y to denote whether this image marks the beginning of a box break.
PAGES	Number of pages associated with the image
Character	Description
Y	First page of a document
Comma (,)	Indicates a page break or pages

Example: Concordance Image format for single-page TIFF files

```
00010002,COW001,COW001\001\00010002.tif,Y,,,1
00010003,COW001,COW001\001\00010003.tif,Y,,,1
00010004,COW001,COW001\001\00010004.tif,Y,,,3
00010005,COW001,COW001\001\00010005.tif,,,,
00010006,COW001,COW001\001\00010006.tif,,,,
```

Example: Concordance Image Format for Multiple-Page TIFF files

```
00010036,COW001,COW001\001\00010036.tif,Y,,,29
```


00010065,COW001,COW001\001\00010065.tif,Y,,,2

00010067,COW001,COW001\001\00010067.tif,Y,,,3

00010070,COW001,COW001\001\00010070.tif,Y,,,1

00010071,COW001,COW001\001\00010071.tif,Y,,,1

 A load file does not necessarily need the volume name, but still needs the parameter for the volume name (the commas). Example format: Imagekey/Alias,Volume Name,Pathname,Doc Break,Folder Break, Box Break, Page Count - without the VOL name would look like this: 0000001,,D:\VOLO001\001\0000001.tif,Y,,,1

Image Alias

Your load file format's alias should match your image key from the Concordance database. Concordance stores this key in order to reference the image.

 The alias in your load file matches the database field that has the Image check box selected on the Modify dialog box for the database in Concordance. For more information about the Image check box, see About fields.

Other Image Load Files

When receiving images, you may not be provided with an image load file for Concordance, but may receive image load files for other discovery applications. These files often have a .dii, .lfp, or .oll extension. We recommend familiarizing yourself with these formats as well.

If you only receive these formats, you can convert these files into the proper format for Concordance Image using conversion utilities.

Example: Other load file format for single-page TIFF files

IM,00010002,D,0,@COW001;001;00010002.tif;2

IM,00010003,D,0,@COW001;001;00010003.tif;2

IM,00010004,D,0,@COW001;001;00010004.tif;2

IM,00010005, ,0,@COW001;001;00010005.tif;2

IM,00010006, ,0,@COW001;001;00010006.tif;2

Tips and Tricks for Loading Image Files

If your image files aren't importing properly, check the following:

- Locate and replace volume paths on the Directory tab.
- Customize the path prefixes on the Path tab.

- Verify the file name and path information in the image load file (after you locate and replace) by pasting the volume path into the Windows Run field. If the path is correct, the proper folder or image opens.
- Edit the .vol file in List File Management dialog box to remove unwanted entries. Or, export a .log file and edit in text format.
- Use UNC paths when on a network for inconsistent drive mappings.
- Verify that all documents in the current query link to an image, and verify that every image exists. Records with missing links in the imagebase are tagged and tracked in a .log file.
- Have the image re-processed if the TIF file is corrupt or is an incompatible format.
- Rotate images using Adobe Photoshop®, Microsoft Office Document Imaging, or Irfanview.

✍ A common Concordance Technical Support call is due to the file path in the image load files being incorrect. Be certain to verify this information. You can search and replace the path to the correct directory where your image resides.

✍ Before loading a data volume, verify that the Bates Number for the first record to be loaded does not overlap with the last bates number used in the existing collection. If it does, you should request a correction from the source prior to loading.

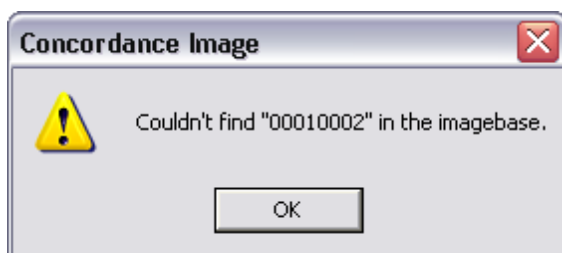
To load image files:

1. From the Windows **Start** menu, open Concordance Image.

✍ We recommend launching Concordance Image.exe from the Start menu only when you are first registering images. During image record review, simply click the View image (camera) button on the Dynamic toolbar in Concordance.

2. In Concordance, on the **Dynamic** toolbar, click the **View image** (camera) button to activate and synchronize Concordance Image with the database.

Concordance Image automatically launches a message prompt. This is not an error in the system; the application simply cannot locate the image files because they are not imported yet.

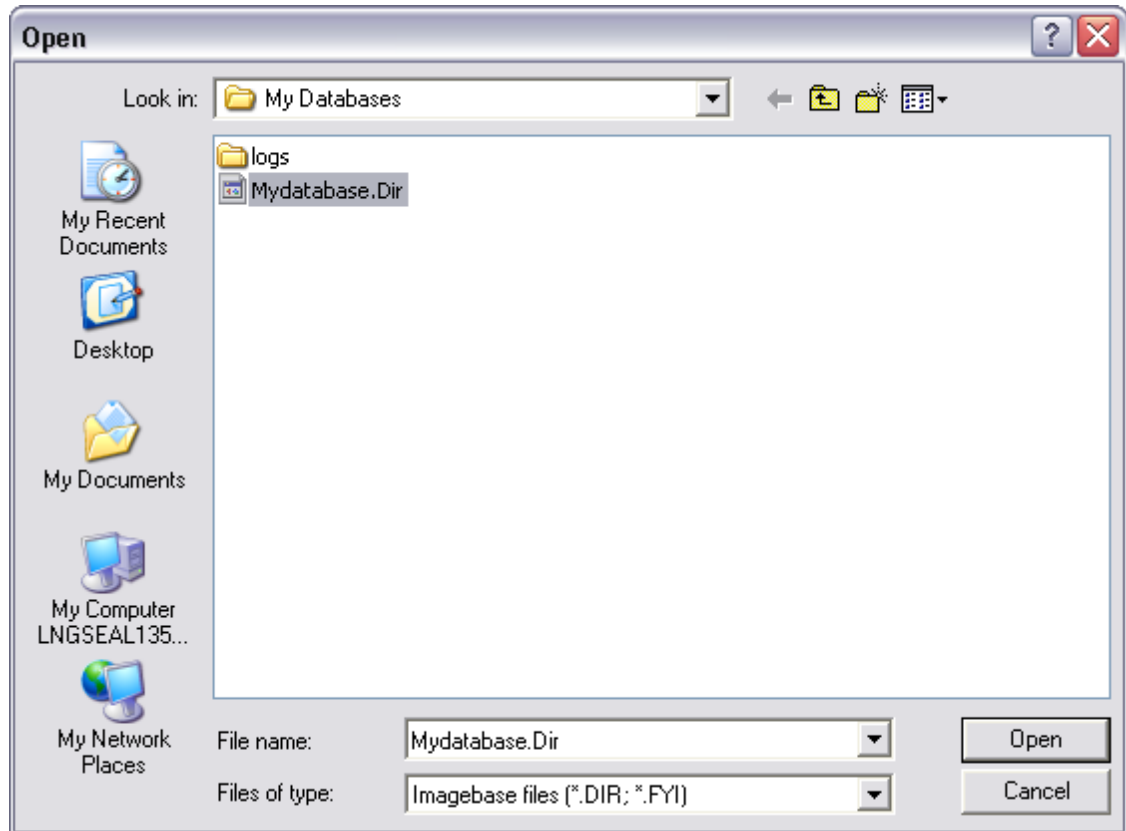


3. Click **OK**.

4. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

Clicking Imagebase Management opens the Open dialog and Concordance automatically creates the .dir and .vol files, which are stored in the same folder as your database.

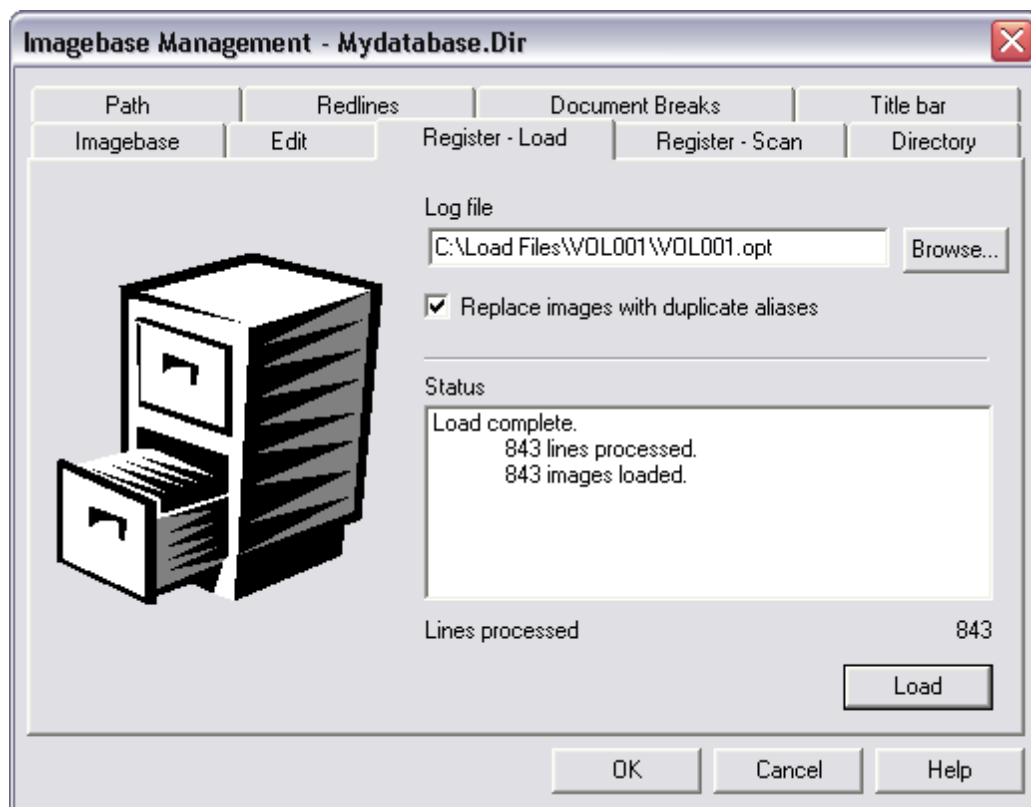
5. Browse to and click the database's .dir file, and then click **Open**.



- ⚠ Make sure that you click the correct .dir file that is located in the same directory as your database. If not, you will be modifying the imagebase for a different database

Clicking Open opens the Imagebase Management dialog box.

6. Click the **Register – Load** tab to load and register your image files.



7. Click the **Browse** button, locate and open the **image [volume name].opt** file you want to load.

The Replace images with duplicate aliases check box is selected by default.

8. Click the **Load** button.
9. In the **Status** field, verify that the image files transferred into the database, and then click **OK**.
10. In Concordance, open a record to view your image files.

⚠ If the .dir and .vol files associated with an imagebase are accidentally deleted, you need to reload the imagebase in Concordance and relink it to its corresponding database.

💡 We recommend that you take some time to experiment with loading an image file and practice edits or repairs to it so you become adept at identifying and fixing any corruption yourself. Most technical support calls for this phase of administration are due to an incorrect file path.

Adding eDocuments (v10.21 or later)

Adding documents to an existing E-Documents database (Concordance version 10.21 and later) is made easy using a simple file drag-and-drop operation. Concordance automatically processing the documents, assigning document IDs, reading document metadata, extracting text, and appending the records to the database.

Any file or electronic document format not supported will be added to the database as an excluded file, but the contents will not be imported. You'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.

Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance. For more information, please see the Microsoft website.

The new E-Documents import wizard is only compatible with the full installed version of Concordance. This feature is not available for a Concordance Workstation installation.

Supported file types (Concordance v10.21)

Concordance v10.21 supports the following E-Document file types for creating and adding documents to an E-Documents database:

File Type	Description
*.tif, *.tiff	Tagged Image File
*.jpg, *.jpeg	Joint Photographic Experts Group
*.gif	Graphic Image File
*.bmp	Bitmap
*.asc	ASCII text
*.pcx	PC Paintbrush bitmap
*.csv	Comma-Separated Values
*.cal, *.cals	Facsimile
*.pdf	Adobe Portable Document Format
*.doc, *.dot, *.docx	Microsoft Word
*.ppt, *.pps, *.pptx, *.pptm	Microsoft PowerPoint®
*.xls, *.xlsx, *.xlw, *.xlt	Microsoft Excel®
*.msg	Microsoft Outlook 2010 Message File
*.txt	ASCII Text
*.rtf	Rich Text Format
*.html, *.htm	Web/HTML — Only supported in E-Document databases.
*.pab	Microsoft Outlook Personal Address Book

*.wps

Microsoft Works

 To add documents to an existing E-Documents database (Concordance v10.21 or later):

1. In Concordance, open the database you want to add additional records.
2. Open the folder that contains the documents you want to add to the database.
3. From the source folder, select the file(s) to add, and drag the files to the Concordance workspace.
4. When prompted to add the documents, click OK.
5. In the **Browse** view, verify that the E-documents you added displays properly.
6. If you have already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

If you receive the following message, Dictionary file exists, overwrite?, click Yes.

Importing eDocuments (v10.20 or earlier)

Concordance is able to import a variety of electronic documents (eDocuments), including text, Adobe Acrobat PDF, and Microsoft Word, PowerPoint, and Excel files into an existing eDocuments database. For more information, see Creating an eDocuments database.

Electronic documents require that source file software, like Microsoft Office and Adobe Acrobat, are pre-installed on your network in order to extract the data from the file and import it into your Concordance database.

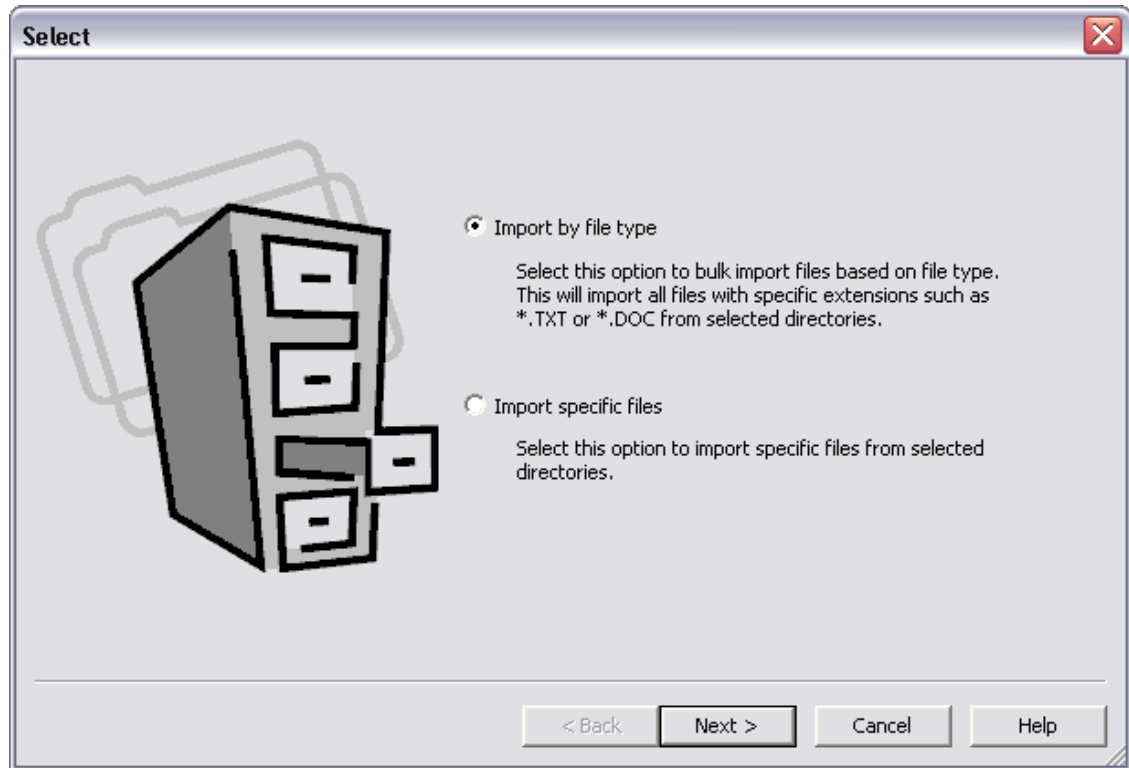
Concordance, however, does not allow importing of data from any zipped, encrypted, .exe, or system files. The files are imported but not the data contained with the file. You'll need to adhere to any forensic data processes as outlined by your organization or recommended for e-discovery processing.

-  Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance. For more information, please see the Microsoft website.
-  When using the Record Divider option, imported Microsoft Excel files that contain more than one sheet and viewed in Concordance Native Viewer will display only the first sheet for the database record. No view is available for the other sheets associated with the record.

 To import e-document files:

1. In Concordance, open the database you want to import eDocuments.
2. On the **Documents** menu, point to **Import**, and then click **E-documents**.

Clicking E-documents opens the Select dialog box.

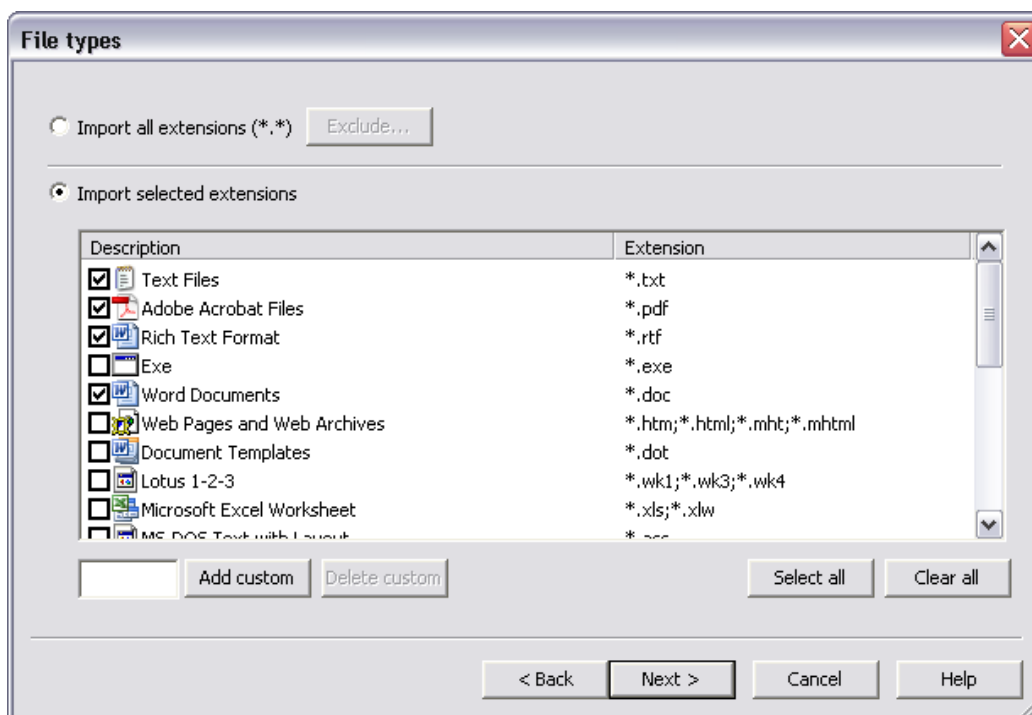


3. Select **Import by file type** or **Import specific files**, and click **Next**.

The Import by file type option is used to bulk import e-documents by file type. If you selected Import by file type, clicking Next opens the File types dialog box.

To select e-documents for import by file type:

1. In the **Select** dialog box, click **Import by file type**.
2. Click **Next** to open the **File types** dialog box.



3. To import all file types, select **Import all extensions**.

 To exclude file extensions:

1. Click the **Exclude** button to open the **Exclude extensions** dialog box.

The extension list contains the file extensions that are currently excluded.

2. To add a file extension to the list, type the file extension in the field below the file extension list and click the **Insert** button.

Be sure to add a file extension using the same format that appears in the list. For example, to exclude all files that end in .pal, type *.PAL. The file extension list is a list file called ImportExclusions.lst and can be found in the same directory as the Concordance_[version number].exe file.

3. To delete a file extension from the list, click the file extension and click the **Delete** button.
4. Click **Done** to save your changes and close the **Exclude extensions** dialog box.

To import specific file types, select Import selected extensions.

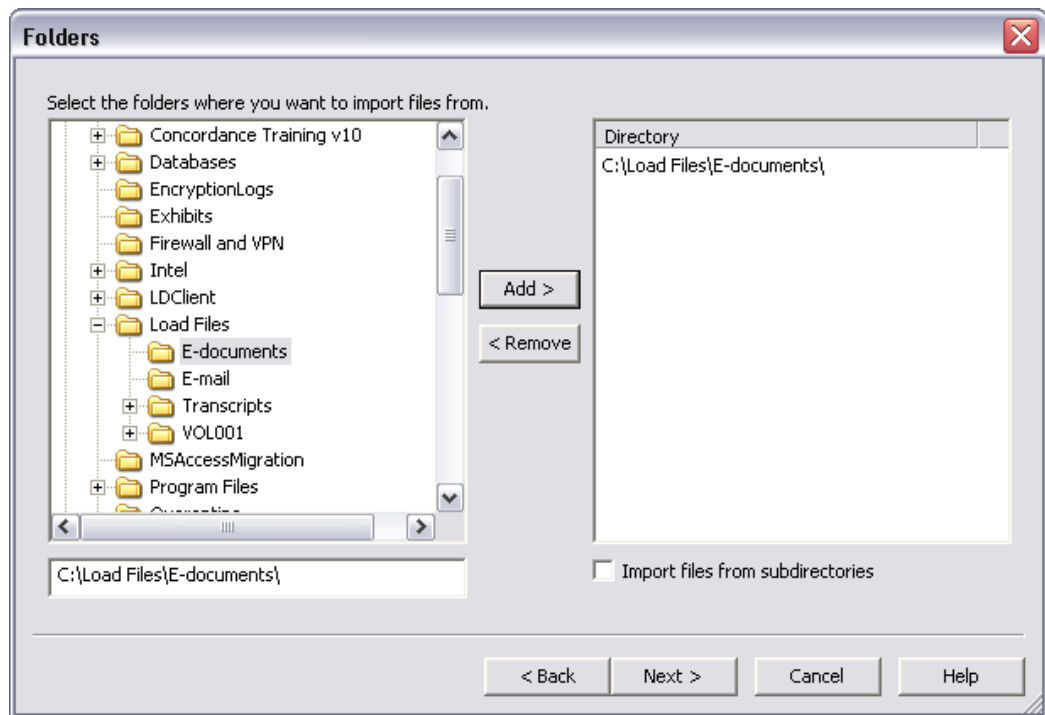
 To determine which file types are imported:

If the check box next to a file type is selected, Concordance imports this file type; otherwise, Concordance ignores it.

1. Select the check boxes next to the file types you want to import.
2. Clear the check boxes next to the files types you do not want to include in the import.

If there is a file type extension you want to import that is not in the file type list, you can add the file type extension to the list. Be sure to add a file extension using the same format that appears in the list. For example, to import all files that end in .pal, type *pal*.

3. To add a file type extension to the file type list, type the file extension in the field next to the **Add custom** button and click the **Add custom** button.
 4. To delete a custom file extension, in the file type list click the file extension, and click the **Delete custom** button.
4. Click **Next** to open the **Folders** dialog box.



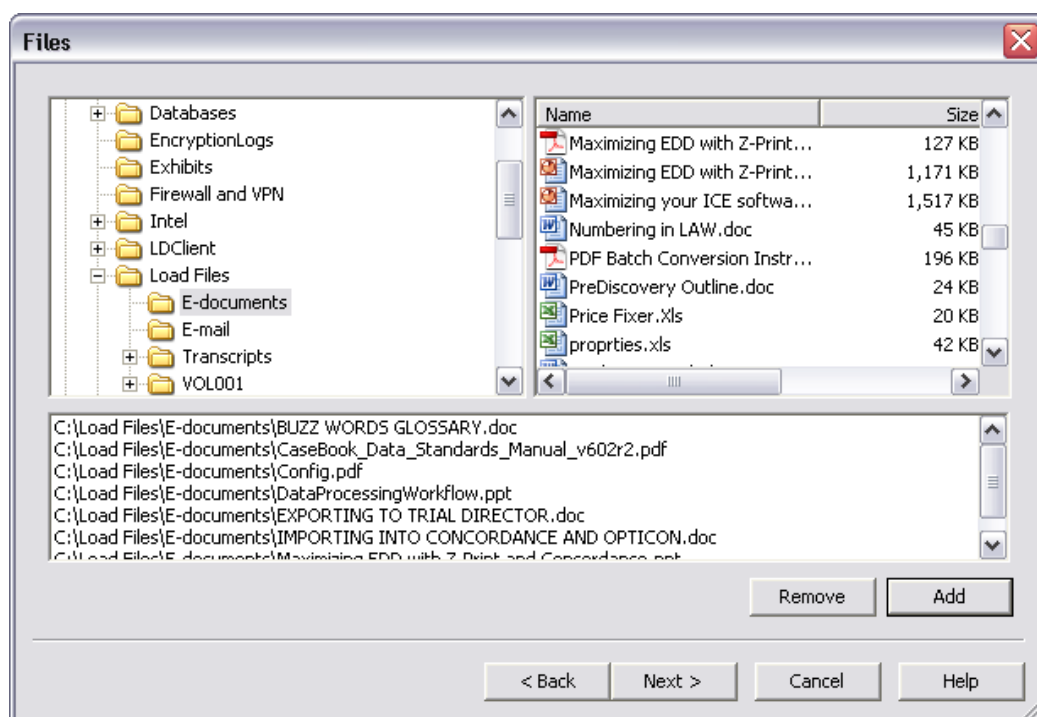
5. In the folder list, do one of the following to add the the path to the **Directory** list:
 - Browse to the folders containing the e-documents you want to import into the database, click the folder name and click the **Add** button.
 - Under the folder list in the blank field, type the filepath to the folders you want to import, click the **Add** button.
 - Drag folders from the folder list to the **Directory** list.

6. To include the files from the folder subdirectories, select the **Import files from subdirectories** check box.
7. Click **Next** to open the **Fields** dialog box.

The Import specific files option is used to import e-documents by file name. If you selected Import specific files, clicking Next opens the Files dialog box.

☐ **To select e-documents for import by file name:**

1. In the **Select** dialog box, click **Import specific files**.
2. Click **Next** to open the **Files** dialog box.



3. In the folder list, browse to and click the folders containing the e-documents you want to import.

The files and folders in the selected folder are displayed in the file list to the right of the folder list.

4. Click the files you want to import and click the **Add** button.

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

Clicking the Add button adds the file name and full file path to the import list.

If you need to remove a file from the import list, click the file name and path in the import list and click the Remove button.

5. Click **Next** to open the **Fields** dialog box.
3. After selecting the e-document files to import, click **Next**.
4. In the **Fields** dialog box, to change a field mapping, select a different Concordance field, when finished click **Next**.

When importing e-documents, Concordance captures metadata when possible, including the document ID, author, creation date, and last modified date. Concordance also captures the metadata present in formatting such as font changes, bolding, underlining and highlighting.

Each of the fields in the Fields dialog box are set to the default Concordance field mappings.

When appropriate, Concordance saves metadata to separate fields. The Fields dialog box allows you to specify which data is stored to which Concordance field. Most of the time this data is mapped automatically. For instance, if you have an AUTHOR field, then the author data is stored to it.

Select the field mapping for your database.

Title	TITLE	Comments	COMMENTS
Subject	SUBJECT	Metadata	METADATA
Author	AUTHOR	Date	DATE
Company	COMPANY	Creation date	CREATIONDATE
Category	CATEGORY	Modification date	MODDATE
Keywords	KEYWORDS	Print date	PRINTDATE
Producer	PRODUCER	Document text	TEXT01
Creator	CREATOR	File path	FILEPATH
Doc ID	DOCID		

< Back Next > Cancel Help

- ⚠ To make sure that the edocs import properly, the Document Text field must be set to an OCR paragraph field with an alpha prefix and numeric suffix, such as TEXT01.

5. In the **Options** dialog box, specify any of the following:

Options

☒ Match metadata field names ☒ Create hyperlinks to original document

☐ Store file name without full path ☒ View e-Docs in Concordance Native Viewer

☐ Auto Number documents with DOCID (document ID)

Prefix: Starting Number (zero-filled):

The DOCID is the image key (unique identifier) for a document. If the Prefix and Starting number are not specified, Concordance will automatically create one for each document. The starting number cannot be longer than 9 digits.

Log file:

If you specify a file name, any messages produced during import will be copied to a plain text file.

Plain text files only

Record divider: ☐ Divider is anchored

< Back Next > Cancel Help

- To match a document's user-defined metadata fields with the Concordance database's fields, select the **Match metadata field names** check box.

When the Match metadata field names check box is selected Concordance will do its best to determine where an imported document's metadata is stored in the document.

- To create a hyperlink back to the original file, select the **Create hyperlinks to original document** check box.

When a user clicks the file name in Concordance, Concordance opens the original file. By default, Concordance stores the file name and its full file path.

- To only store the file name without storing the full path to the file, select the **Store file name without full path** check box.

Concordance can create a .log file of imported files, including whether the import was successful. This log file is useful if an audit trail is required.

- To create the CIB file to view the documents with Concordance Native Viewer, select the **View e-Docs in Concordance Native Viewer** checkbox.
- To auto number the imported e-docs, select the **Auto-number documents with a DOCID (documentID)** check box, and then enter the **Prefix** and **Starting number (zero-filled)**.

Auto-numbering your documents when importing e-docs provides a prefix and starting number for document. If the option is selected and the Prefix and Starting number are not specified, Concordance will automatically create one for each document.

6. To create a .log file, click the **Browse** button, browse to where you want to store the log file, type the log file name in the **File name** field, and then click **Save**.

7. To recognize document breaks in an imported text file, in the **Record divider** field, type the character(s) used in the text file to indicate a divider.

Concordance uses the divider to recognize document breaks within the imported file and creates a new record in the database every time the document divider is encountered. The divider can be any group of characters that you wish to use. For instance, if you decide to use three asterisks *** to mark document breaks, then every time Concordance encounters three asterisks in the imported file it will stop reading, save what it has loaded, and continue reading the remainder of the file as a new record. This feature works only with plain text files, it does not work with rich text files or other word processing formats.

By default, the divider must appear in the file flush against the left margin. Any text on the same line as the divider is stored in the file. If no text follows the divider, the remainder of the blank line is ignored.

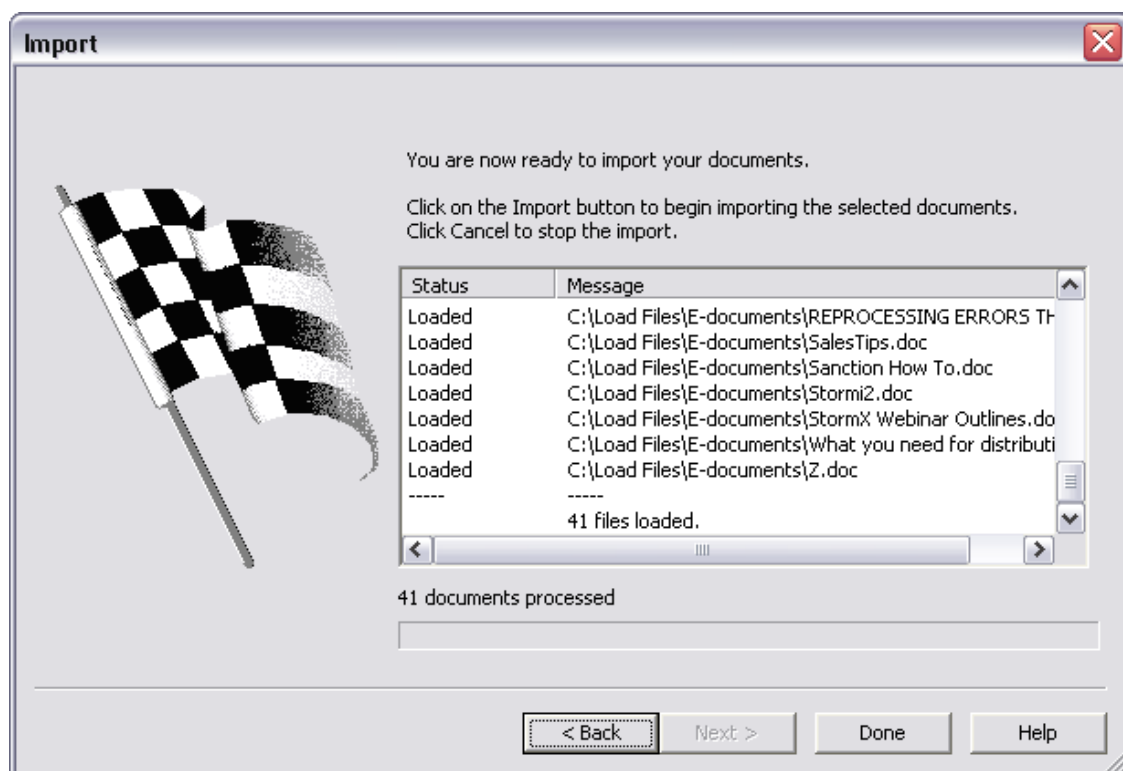
Free floating document dividers are most often encountered when the divider was stamped on documents that were optically scanned. The stamp can appear almost anywhere between the margins. When left justified dividers are not selected, any text that precedes the marker on the same line is ignored.

 When viewing a divided text file in Concordance Native Viewer (CNV), the entire native document is displayed when opened from the first associated record only, regardless of any divider characters. No view is available for the remaining Concordance records for the text file. For example, a text file contains two separators in the file creating three separate records in Concordance. When CNV is opened to view the file, the first record displays the native file in its entirety. If you navigate to the second or third record, no native view is available for those records.

8. If the document divider is flush left, select the **Divider is anchored** check box.

When the Divider is anchored check box is not selected, Concordance looks for the divider text in each line it reads, from the left margin to the right margin.

9. Click **Next** to open the **Import** dialog box.



10. Click the **Import** button.
11. After your e-documents finish loading, click the **Done** button.

To verify the imported files:

Once you have imported your e-document files, it is best practice to verify that files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. in the **Browse** view, verify that the e-documents files you imported display properly.
3. If you have already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

If you receive the following message, Dictionary file exists, overwrite?, click Yes.

Importing e-mail and attachments

When importing e-mails and attachments into Concordance, it's best to create an eMail database for these files because they contain unique internet account type coding for the author and recipients, include a parent and child structure that needs to be preserved, and attachments that need to be retained. All of these components are critical metadata that can easily be altered, spoliating original records and damaging critical information regarding who knew what and when. Once damaged, this information is nearly impossible to restore and is irretrievable after the import process.

Concordance is able to import .pst formatted files that are associated with a Microsoft Outlook profile on your machine. You need to have Outlook or Microsoft Exchange Server installed with a mail profile set up for each custodian, so you can associate each .pst file to an Outlook profile. This should be done before using the Import e-mail wizard in Concordance.

Concordance provides an eMail database creation wizard, which includes typical metadata fields from Outlook and takes care of the field mapping for you. The wizard also allows you to create and modify fields as needed. For more information about creating an eMail database, see [Creating an Email database](#).

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

- **Concordance Native Viewer** - the View e-mails in Concordance Native Viewer option must be selected in the Import e-mail - Attachments dialog box to ensure the Concordance Imagebase (CIB) file is created (for new records only). For more information, see [About viewing native files](#).
- **Concordance Image** - e-mails need to be processed into images with a corresponding .dat and image load file. For more information, see [Using Concordance Image with Concordance](#).

 If you need to export your e-mail from Concordance back to a .pst file, then consider using Discover the Wave's Trident Pro software.

 Some earlier versions of Microsoft Excel files are no longer supported through Microsoft and cannot be opened from Concordance. For more information, please see the Microsoft website.

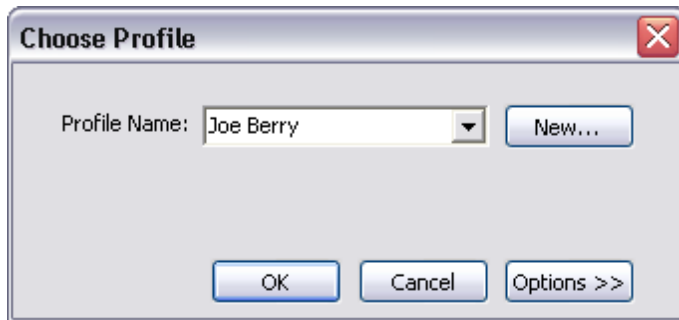
To import e-mail and attachments:

The third step in importing e-mail and attachments is to import the the e-mail and attachment files into your e-mail database. E-mail is imported into Concordance using the Import e-mail wizard. The Import e-mail wizard automatically establishes parent-child relationships with the e-mail messages and their attachments. This provides efficient and comprehensive searching and saves time in document loading.

 When importing e-mails into a concatenated database, e-mails are updated when the fields of an imported e-mail match an existing email. When the fields do not match, the imported email is appended to the main database, which is the first database in the concatenated set.

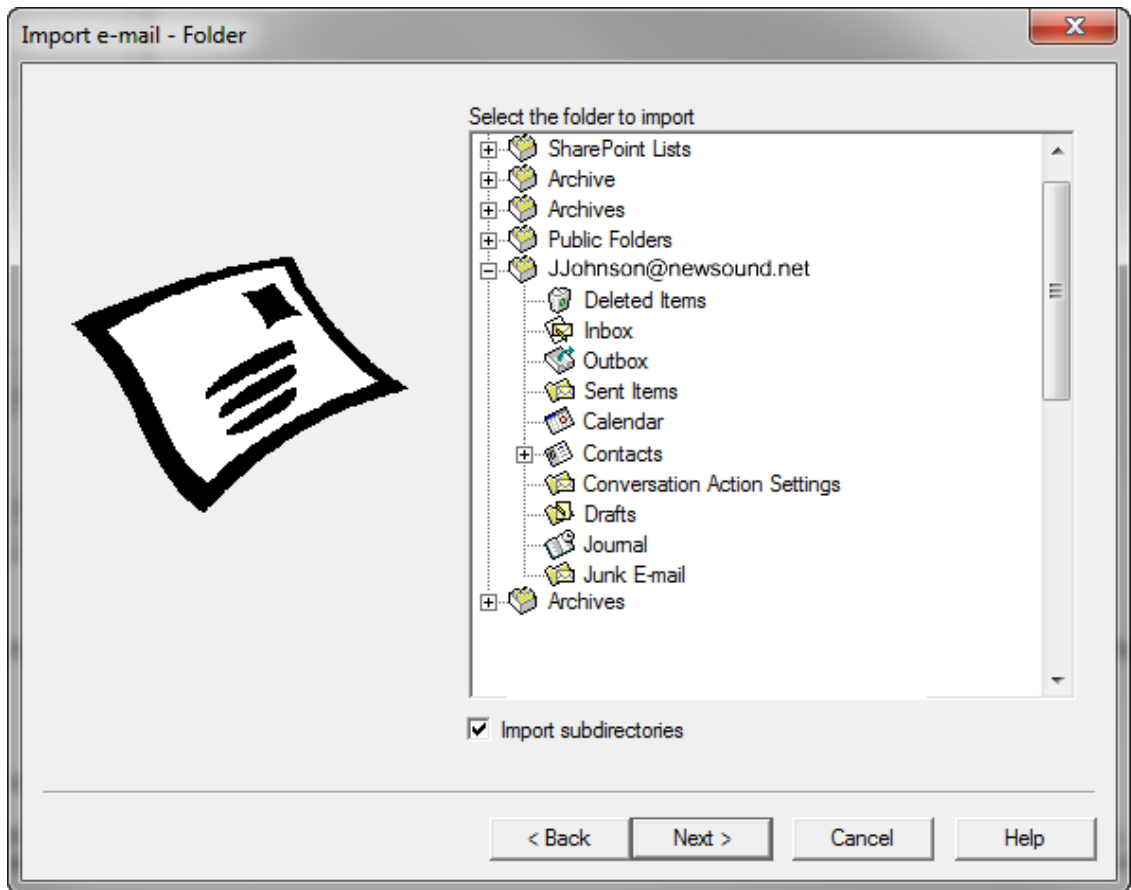
1. In Concordance, open the eMail database you want to import additional documents.
2. On the **Documents** menu, point to **Import**, and click **E-mail and Attachments**.

3. In the **Choose Profile** dialog box, from the **Profile Name** list, select the name of the e-mail profile you created, and click **OK**.



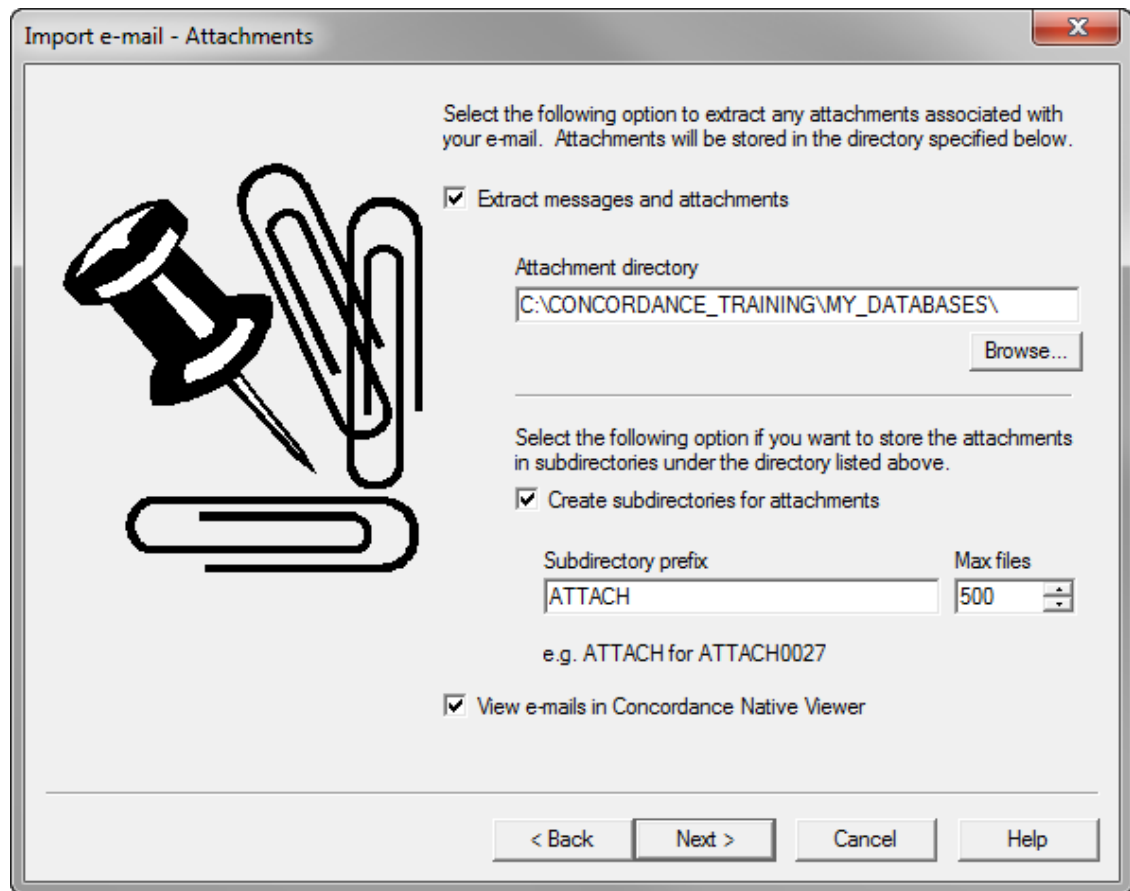
4. In the the **Import e-mail - Folder** dialog box, click the .pst folder associated with the e-mail profile you created.

To import the entire .pst file, be sure to click the .pst file's top-level folder. If you select a folder that does not contain e-mail messages, such as the Microsoft Outlook calendar or contacts, the folder can be imported, but the records created will not be complete because the Import e-mail wizard only imports information related to e-mail messages.



5. To include the folder's subdirectories, make sure that the **Import subdirectories** check box is selected.

6. Click **Next**.
7. In the **Import e-mail - Attachments** dialog box, specify any of the following:



- To extract attachments, make sure that the **Extract .MSG files and attachments with e-mail** check box is selected, and browse to the directory where you want to store the extracted email files and attachments.

E-mail .msg files and attachments can be extracted and saved to a specific directory.

By default, the Extract .MSG files and attachments with e-mail and Create subdirectories for attachments check boxes are selected. The Attachment directory field defaults to the e-mail database's directory, the Subdirectory prefix field defaults to ATTACH, and the Max files field defaults to 500.

It is best practice to store attachments in subdirectories, especially when you are managing large numbers of attachments.

- To store email .msg files and attachments in subdirectories of the directory displayed in the **Attachment directory** field, make sure that the **Create subdirectories for attachments** check box is selected. In the **Subdirectory prefix** field, type the prefix you want to use for the subdirectory folder names, and in the **Max files** field, type or scroll to the maximum number of files allowed in each subdirectory.

Subdirectories are named using a prefix and a number. For example, if you specify the prefix *ATTACH* and the maximum files to store as 500, the first subdirectory created will be *ATTACH0000*. After that directory is filled with 500 files, the import creates the

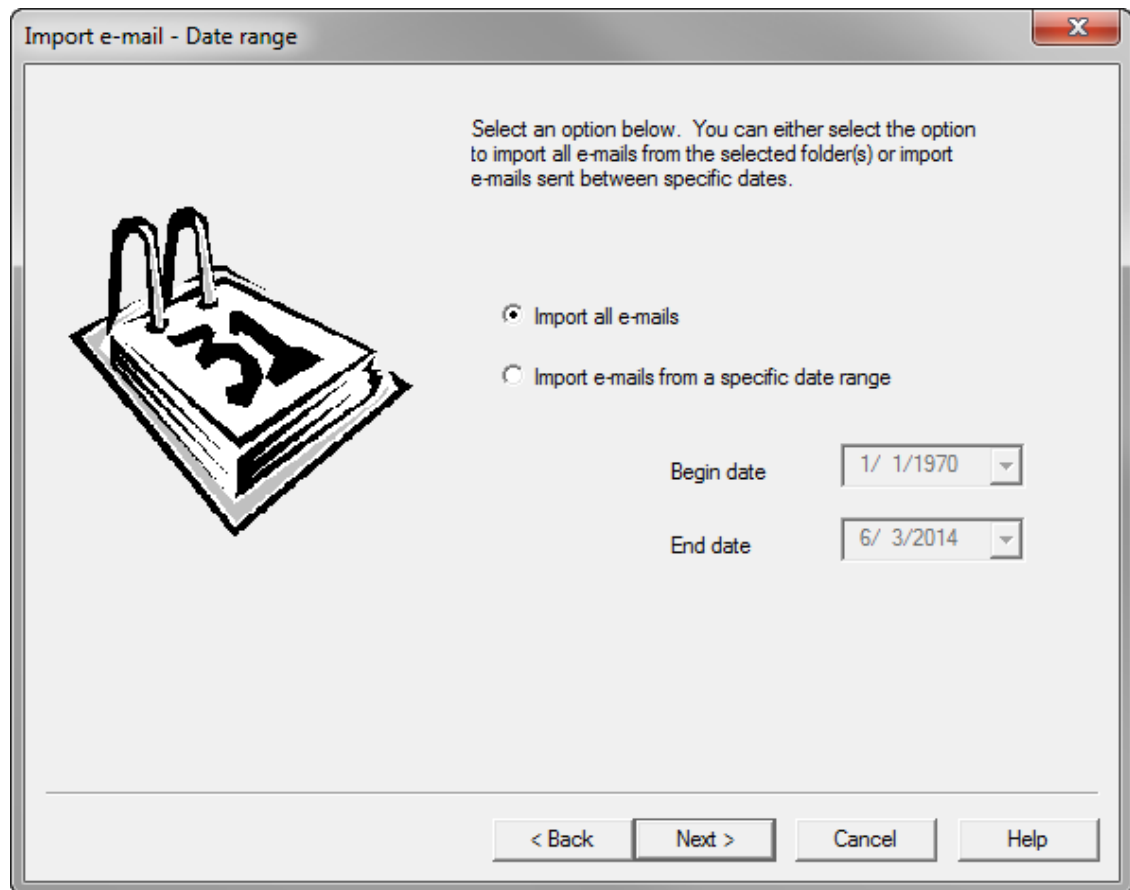
ATTACH0001 directory, and proceeds to store attachments in the *ATTACH0001* directory until it reaches 500 files. This process continues until all the attachments are extracted.

- To display e-mails in Concordance Native Viewer for review, select the **View e-mails in Concordance Native Viewer** check box.

Selecting this option creates the Concordance Imagebase (CIB) file that is needed to link the view of the e-mail files with the corresponding record in Concordance. You must modify the database and make DOCID the image key field. To modify the database fields, see

⚠ When working with Concordance Native Viewer, each document must contain a unique ID. You must select the Auto-number option in the **Import e-mail - Options** dialog box. The DOCID can be automatically generated by Concordance or you can specify your own numbering scheme by setting the Prefix and Starting Number.

6. When finished, click **Next**.
7. In the **Import e-mail - Date range** dialog box, specify any of the following:
 - To import all e-mail messages in the selected .pst folder, select the **Import all e-mails** option.
 - To import only the e-mail messages for a specific data range in the selected .pst folder, select the **Import e-mails from a specific date range** option and then specify the Begin Date and End Date.



8. When finished, click **Next**.

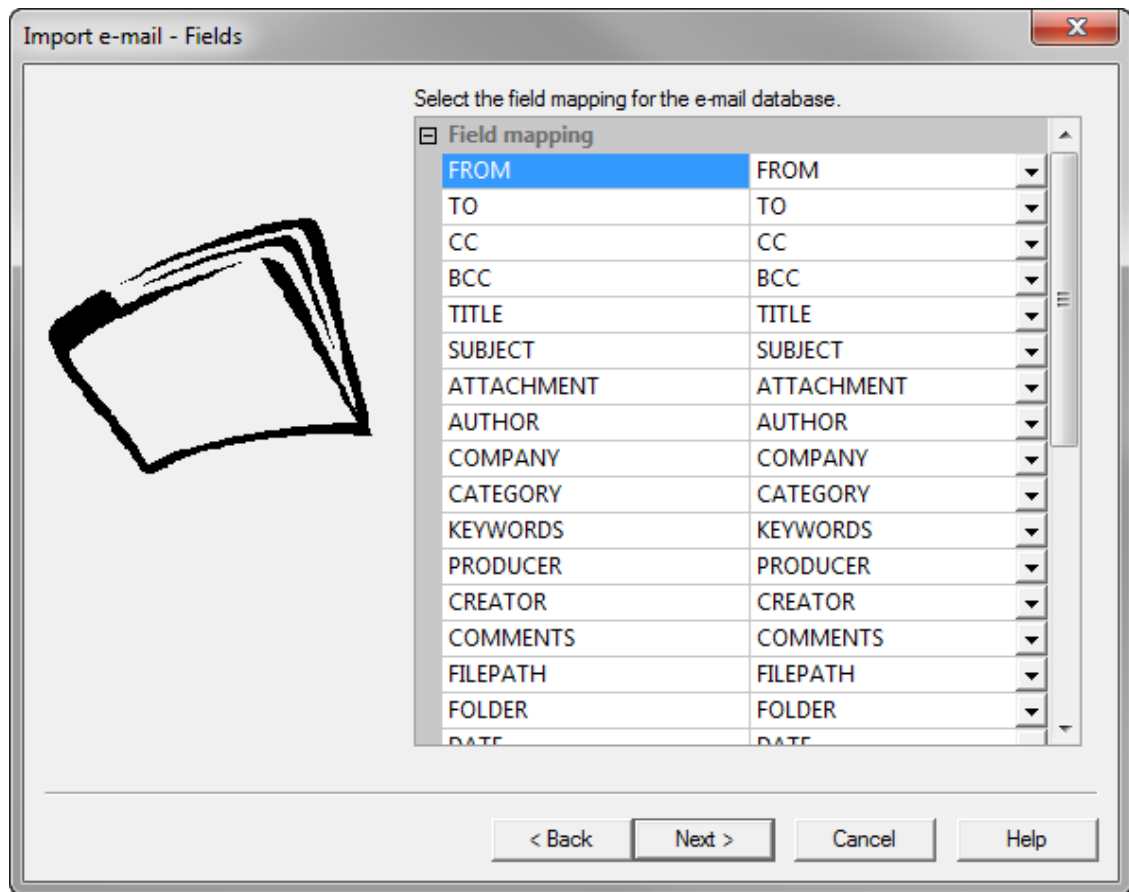
9. In the **Import e-mail - Fields** dialog box, specify any of the following:

You can map specific e-mail fields, such as the sender and recipient, to Concordance database fields. Using the E-mail and Attachments template to create your e-mail database ensures all fields exist for accurate mapping between e-mail messages and the Concordance fields. The E-mail and Attachments database template has all the fields necessary to import and store e-mail messages.

The left column displays the e-mail message fields, and the right column displays the database fields.

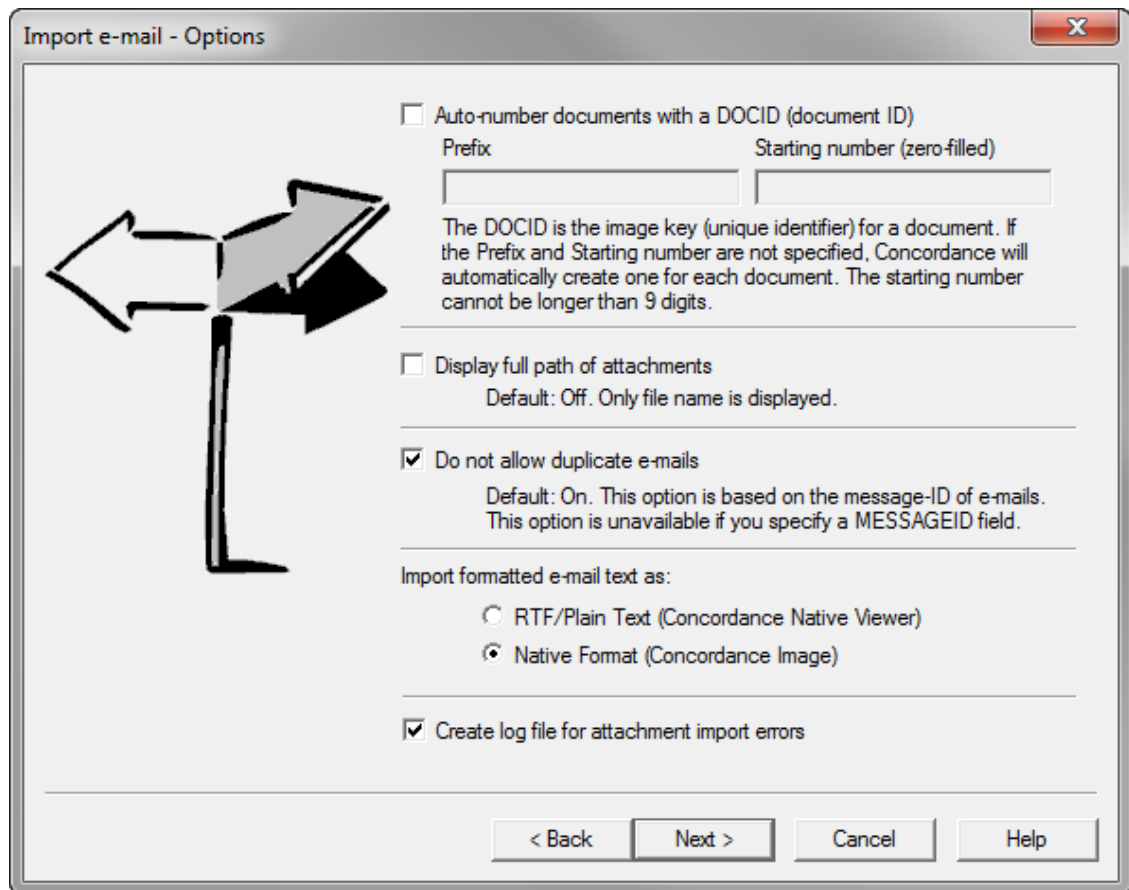
If your e-mail database was created from the E-mail and Attachments template, the database fields are automatically mapped to the correct e-mail message fields.

If your e-mail database was not created from the E-mail and Attachments template, select the database fields you want to map to the e-mail message fields.



10. When finished, click **Next**.

11. In the **Import e-mail - Options** dialog box, specify any of the following:



- To auto number the imported e-mail messages, select the **Auto-number documents with a DOCID (documentID)** check box, and then enter the **Prefix** and **Starting number (zero-filled)**.

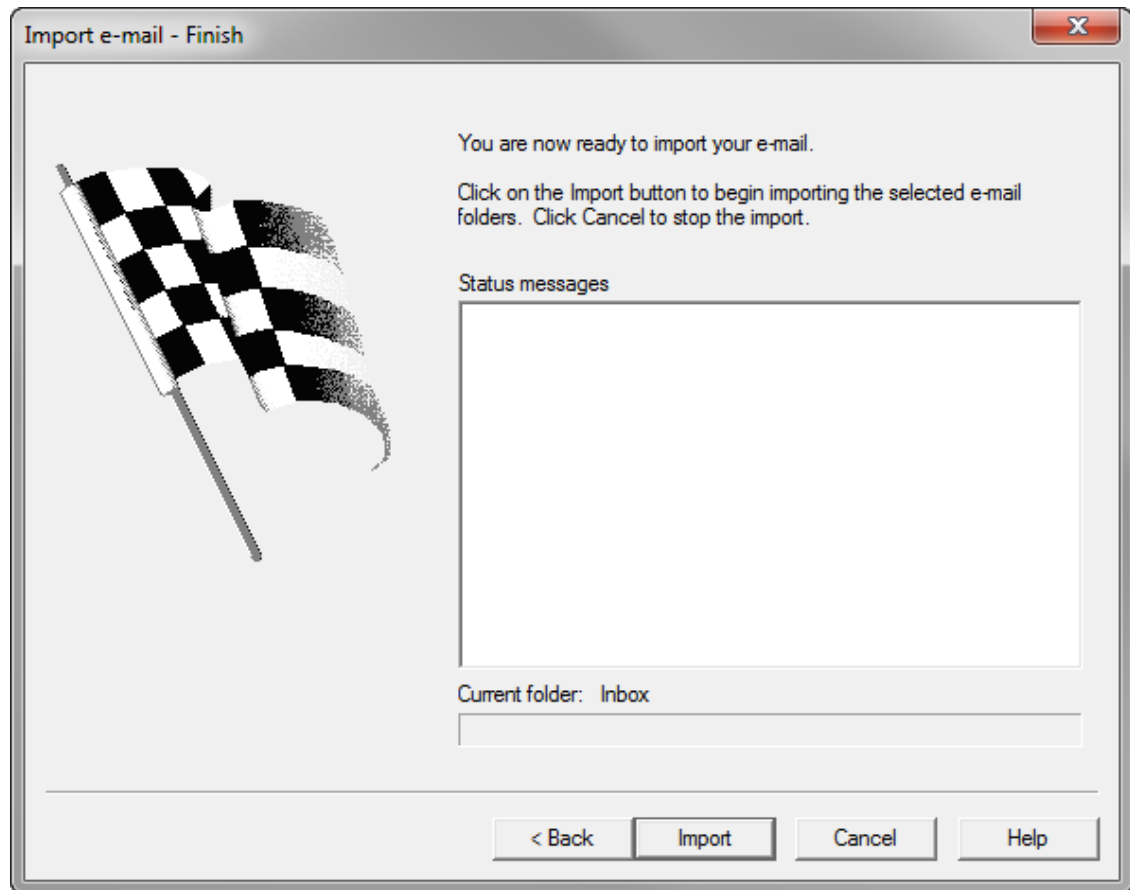
Auto-numbering your documents when importing e-mail messages provides a prefix and starting number for each e-mail message and any attachments, while also tracking family groups in a DOCID and PARENT_DOCID field. If the option is selected and the Prefix and Starting number are not specified, Concordance will automatically create one for each document.

- ☑ The Auto Number documents with DOCID option must be selected to successfully view the documents in Concordance Native Viewer.

- Select the **Display full path of attachments** check box to display the full path to attachments.
By default, only the file name is displayed.
- Select the **Do not allow duplicate e-mails** check box if you do not want to import duplicate e-mails.

Most e-mails have a unique message identifier called the message-id. This entry is stored in the MESSAGEID field. Before importing a message, the Import e-mail wizard checks to see if any previously imported e-mails have the same message-id. If the wizard finds another record with this message-id, it does not import the message.

- Select the **Import HTML formatted e-mail text as** check box to import the body of HTML formatted e-mail messages as RTF/Plain text or Native Format formatting, and then select the text format to use to convert the format.
 - Select the **Create log file for attachment import errors** check box if you want the import to create an import error log.
12. When finished, click **Next**.
 13. In the **Import e-mail - Finish Import** dialog box, click the **Import** button to start the import.



14. When the import is completed, click the **Done** button.

To verify the imported files:

Once you have imported your e-mail messages, it is best practice to verify that the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. In the **Browse** view, verify that the e-mail messages you imported display properly.
3. If you have already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

If you receive the following message, Dictionary file exists, overwrite?, click Yes.

Importing transcripts

Transcripts are the easiest files to load into a Concordance database, but you must load the files into a database created from the Transcript database template. The template is hard-coded with a CPL script that enables line numbering and does the work for you. You can import plain text transcripts, depositions, and West LiveNote portable transcript (.ptf) and portable case format (.pcf) files.

Transcript Import Guidelines

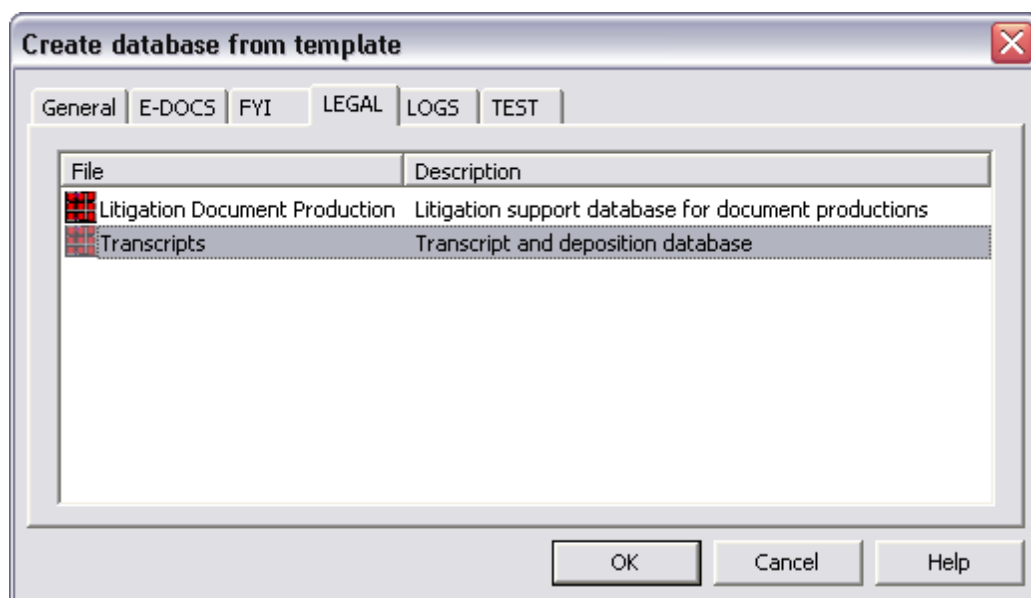
- The transcript database must be created from the Concordance Transcript template
- The maximum size for an imported transcript file is 11 MB
- On average, transcripts have 24-25 lines per double-spaced page

To create a transcript database:

1. On the **File** menu, click **New**.

Clicking New opens the General tab in the Create database from template dialog box.

2. Click the **Legal** tab.



2. Click the **Transcripts** template and click **OK**.

Clicking OK opens the Create Database dialog box.

3. Browse to where you want to save the templates .dcb database file, type the database file name in the **File name** field, and click **Open**.

The Status bar at the bottom of the Concordance screen displays the message *No documents found in query* because you have not imported the documents yet.

To import TXT and PTF transcript files:

1. On the **Documents** menu, point to **Import**, and click **Transcripts**.

 The Transcripts menu command is only enabled when the current database was created using the Transcripts template.

Clicking Transcripts opens the Load transcripts dialog box.

2. Locate and open .txt and/or .ptf transcript files you want to import.

Clicking Open opens the Load transcripts dialog box.

File	Status
transcript_fe...	Awaiting user input
transcript_co...	
transcript_d...	
transcript_d...	

Properties

Current file
C:\Concordance Training v10\Class Exercises

Name
Felten, Edward

Date (MM/DD/YYYY) Time
10 / 03 / 1998 09:30:00 a.m.

Start page Lines per page Volume
1 25 I

Comments

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF COLUMBIA

UNITED STATES OF AMERICA, } }
Plaintiff, } }
v. } Civil Action } No. 98-1:

☐ Save all with default settings Save Cancel

Files loaded: 0/4

3. In the **Properties** section, review the information Concordance has extracted from each of the transcripts you are importing.

To view the transcript information for each transcript, click the transcript file name in the File column.

4. Make any necessary edits in the **Properties** section and click **Save**.

You can edit or add information in the Name, Date, Time, or Comments fields for each transcript before you save it. Use the preview pane at the bottom of the dialog box to locate information needed for those fields.

If you do not want to review the extracted transcript properties for each of the imported transcripts, and just want to save the extracted transcript properties as they are, select the Save all with default settings check box and click Save.

Clicking Save completes the transcript import.

5. To import additional transcript files, click the **Load** button.
6. To close the **Load** transcripts dialog box, click **Done**.

To import PCF transcript files:

1. On the **Documents** menu, point to **Import**, and click **Transcripts**.

 The **Transcripts** menu command is only enabled when the current database was created using the **Transcripts** template.

Clicking Transcripts opens the Load transcripts dialog box.

2. Locate and open the .pcf transcript files you want to import.

Clicking Open opens the Load transcripts dialog box and automatically loads the transcript files into the transcript database.

The process for importing .pcf transcript files is slightly different than importing TXT or .ptf transcript files. Because .pcf files contain multiple transcripts, you are not able to edit and save individual transcripts within a file. Therefore, the step to edit and save the transcript metadata information is skipped in import process.

3. To import additional transcript files, click the **Load** button.
4. To close the **Load** transcripts dialog box, click **Done**.

To verify the imported files:

Once you have imported your transcript messages, it is best practice to verify the files imported correctly. After verification, you need to reindex or index the database.

1. In Concordance, open the **Browse** view.
2. In the **Browse** view, verify that the transcript messages you imported display properly.
3. If you have already indexed the database, reindex the database. Otherwise, run a full index.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

If you get a message prompt stating, Dictionary file exists, overwrite?, click Yes.

Importing Concordance databases

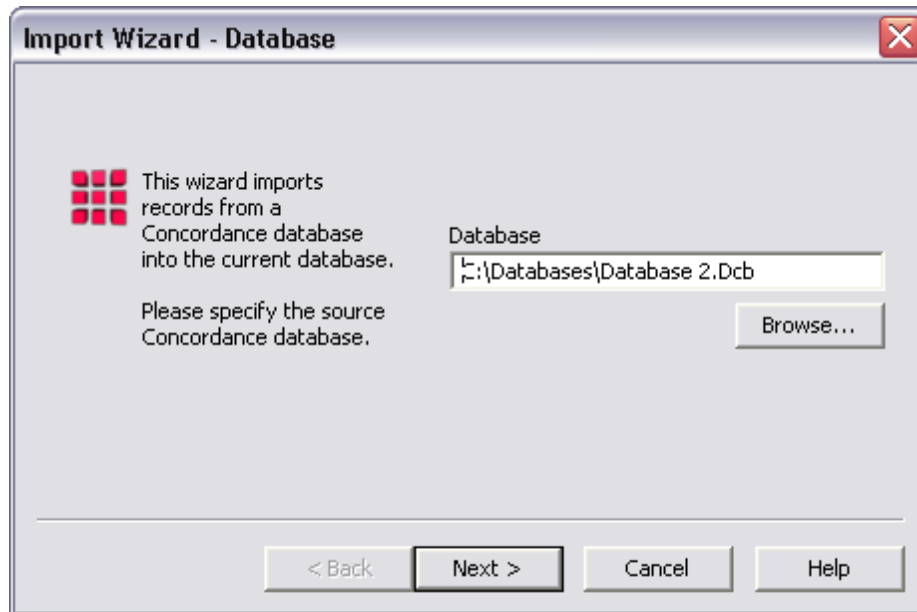
The Import Wizard for Concordance databases guides you through the process of importing records from one Concordance database to another database. You can import and append the records, or import and update existing records. You can select which fields are imported, and indicate whether attachments should be copied.

For more information about importing Concordance databases, see Loading additional data into databases topic.

 To import a Concordance database:

1. In Concordance, open the database you want to import records from another database.
2. On the **Documents** menu, point to **Import**, and click **Concordance database**.

Clicking Concordance database opens the Import Wizard - Database dialog box.



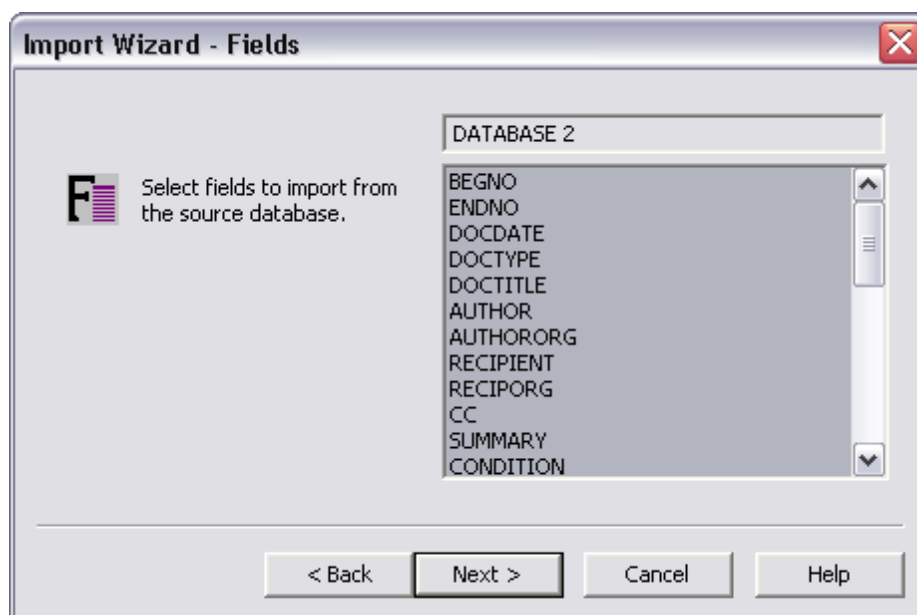
3. Click the **Browse** button to open the **Select database to merge** dialog box.
4. Navigate to and open the .dcb or .fyi file for the database containing the records you want to import.

During the import, every record in the selected database is imported into the current database.

If you only want to import some of the database records into the database, then you need to open the database you are importing, run a search to locate the records you want to add to the current database, and export the records to the current database. For more information about exporting records from one database to another, see [Exporting databases](#).

-  When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When the fields do not match, the imported record is appended to the main database, which is the first database in the concatenated set.

5. Click **Next** to open the **Import Wizard - Fields** dialog box.



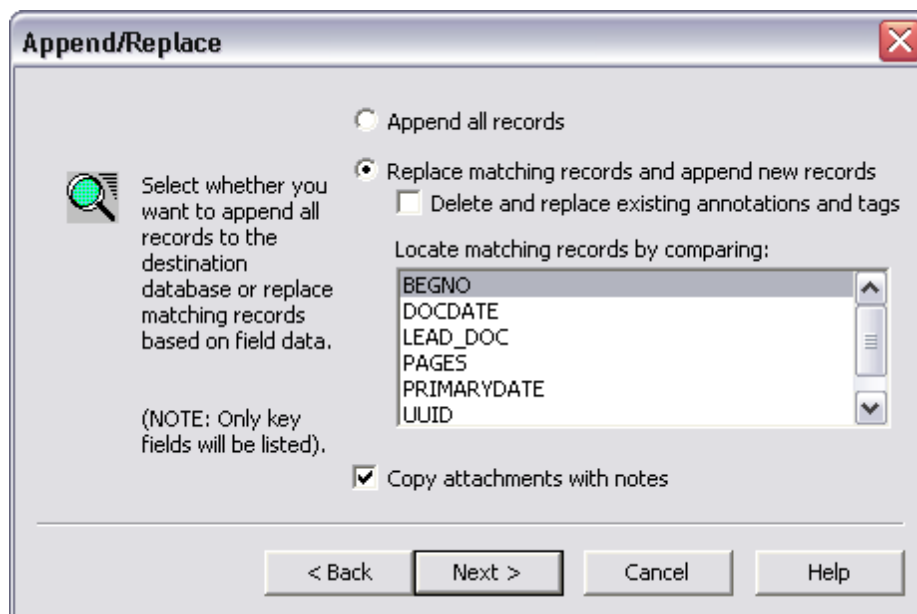
The field list in the Import Wizard - Fields dialog box displays the selected database's fields.

6. Click the fields you want to include in the import.

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

Data from the fields you select in the Import Wizard - Fields dialog box are only imported if the selected fields exist in both databases.

7. Click **Next** to open the **Append/Replace** dialog box.



The Append/Replace dialog box allows you to control how documents are imported into

the current database. The import can append each record, or it can look for a matching record and replace it. If the import does not find a match, it will append the record.

8. To have the import append all records, click the **Append all records** option.

When you select this option, the import adds all imported records as new records after the last record in the current database.

To have the import replace all matching records and append all new records, select the **Replace matching records and append new records** option.

The Delete and replace existing annotations and tags check box determines how annotations are copied when an existing record is updated. By default, the check box is not selected.

9. To have the import remove all existing tags and annotations for a record in the current database when the import finds a matching record, select the **Delete and replace existing annotations and tags** check box.

When the check box is selected, any annotations from the matching imported record are added to the record.

To have the import ignore any existing tags and annotations for a record in the current database when the import finds a matching record, make sure that the Delete and replace existing annotations and tags check box is cleared.

The import uses the fields selected in the Locate matching records by comparing field to determine exact record matches between the two databases. Only key fields are listed in the Locate matching records by comparing field.

Key fields are defined in the Modify dialog box. For more information about key fields, see Creating databases.

10. In the **Locate matching records by comparing** field, select the fields you want the import to use to determine record matches.

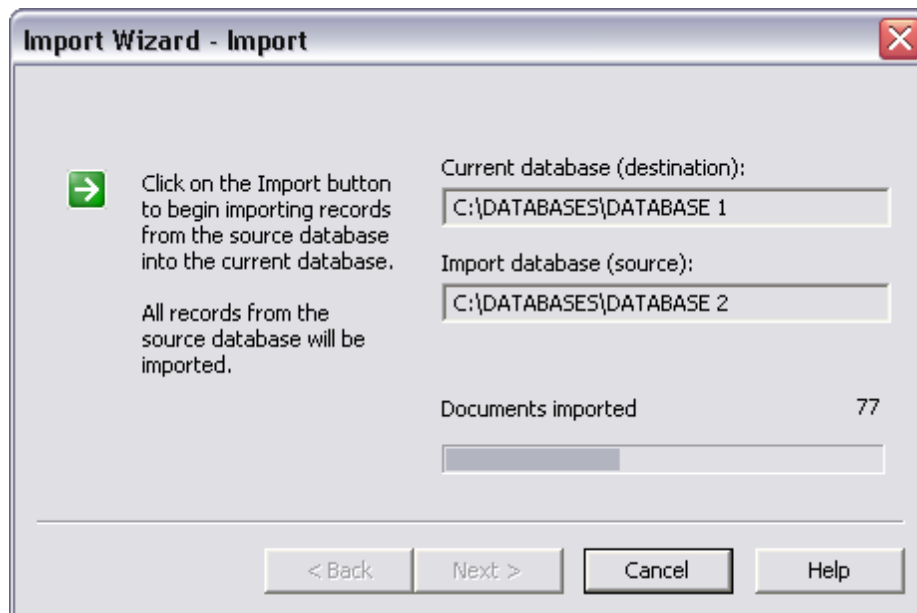
To select multiple fields, use SHIFT+click or CTRL+click.

Full-text paragraph fields are considered a match if the first sixty characters or the first line, whichever is less, match, regardless of the remaining contents of the field.

11. To copy a record's attachments with notes during the import, select the **Copy attachments with notes** check box.

To exclude a record's attachments with notes from the import, clear the Copy attachments with notes check box.

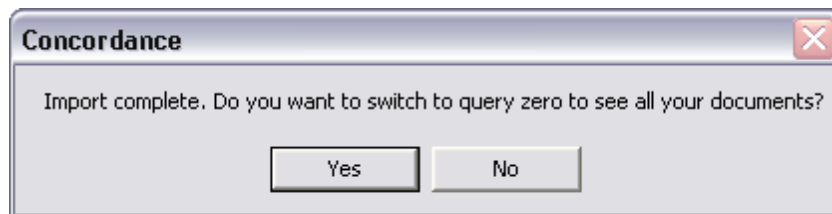
12. Click **Next** to open the **Import Wizard - Import** dialog box.



13. Click the **Import** button to start the import.

You can click the Cancel button at any time to stop the process.

When the import finishes, the following message is displayed:



14. To run the Zero Query in the current (destination) database so that you can view all the database records, click **Yes**.

To close the message without running the Zero Query, click No.

For more information about the Zero Query, see Reviewing search queries.

Creating and Managing Tags

About tags

Typically a Concordance Administrator or Litigation Support Manager works with a lead attorney to build a set of tags for case review that include standard naming conventions and that adhere to internal guidelines for a case review. These tags are often organized into folder structures that indicate phases of review, case topics, or are designated by reviewer. Once tagging conventions are determined, as the administrator you will most likely be setting up

these tags and folders after you build the database so the review team can begin searching and tagging immediately.

- ✍ If you are working with a team of administrators, we recommend that only one or two people be in charge of tag management, especially when making new ones and deleting unnecessary tags. This prevents duplication of efforts and helps tag trees remain uncluttered for all reviewers working in the database.

Managing tags in Concordance requires the following:

- Creating and applying tags to documents and queries
- Removing, renaming, and deleting tags and folders
- Importing and Exporting tags
- Querying tags and folders
- Tracking tag activity in the Tags task pane and .TRK file
- Backing up the tag file

For more information about basic and advanced tagging and tagging strategies, see the topics in the Basic Tagging and Advanced Tagging books under the Using Concordance book.

Creating tags

Tags can be used to categorize documents for any purpose. Use tags to mark documents for status, witnesses, issues, exhibits, keywords, reviewer assignments, or anything else you want to mark. You can group similar tags or issues by creating a folder and adding tags or issues to that folder. Multiple levels of folders can be created to simplify document reviews. You can also create personal folders and sub-folders to help organize your personal tags and issues.

Both reviewers and administrators are able to create and apply tags to documents, but administrators have the ability to do this in four locations so they can track and manage tagging activity.

- ✍ Tags and tag folders do not support Unicode characters. Only ASCII (values 032-126) characters are allowed. If a tag name or tag folder name contain an invalid character, you are prompted to rename the tag or tag folder.

There are six ways you can create tags:

- In the Tags task pane
- On the Add/Delete tab in the Tag and Issue Management dialog box
- By writing tags directly in the TRK file
- By writing tags directly in the INI file
- Writing tags from field data
- Importing Tags

Reviewers can apply tags and create tags in the Tags task pane. Administrators usually create and manage the tags available to all users in the database on the Add/Delete tab in the Tag and Issue Management dialog box.

- ✍ For a tag folder to exist in Concordance, it must have at least one tag created in it. There is no known maximum limit on the number of tags you can create and apply in Concordance.

- 💡 To create a folder for administrative tags, name it zAdmin so it displays at the end of the tag/folder tree and does not distract reviewers.

- ✍ When creating tags and folders, the folder and tag string cannot exceed 199 characters. Example:

The following folder/tag combination would be translated as a total of 45 characters.

001_Reviewer_Assignment

↳ Proposal

↳ Cary_Grant

001_Reviewer_Assignment>>Proposal>>Cary_Grant = 45 characters

📁 To create tags and tag folders in the Tags task pane:

1. Open the **Tags** task pane.
2. To create a new tag folder, right-click the **Tags** task pane, point to **New**, and then do one of the following:
 - To create a new folder, click **Folder**.
 - To create a subfolder, right-click to select the parent folder, point to **New**, and click **Folder**.
3. Type the name of the new folder and press Enter.

- ✍ When you are creating a folder, you must add at least one tag to the folder, or the folder will not be saved when you end your Concordance session. You cannot create empty folders.

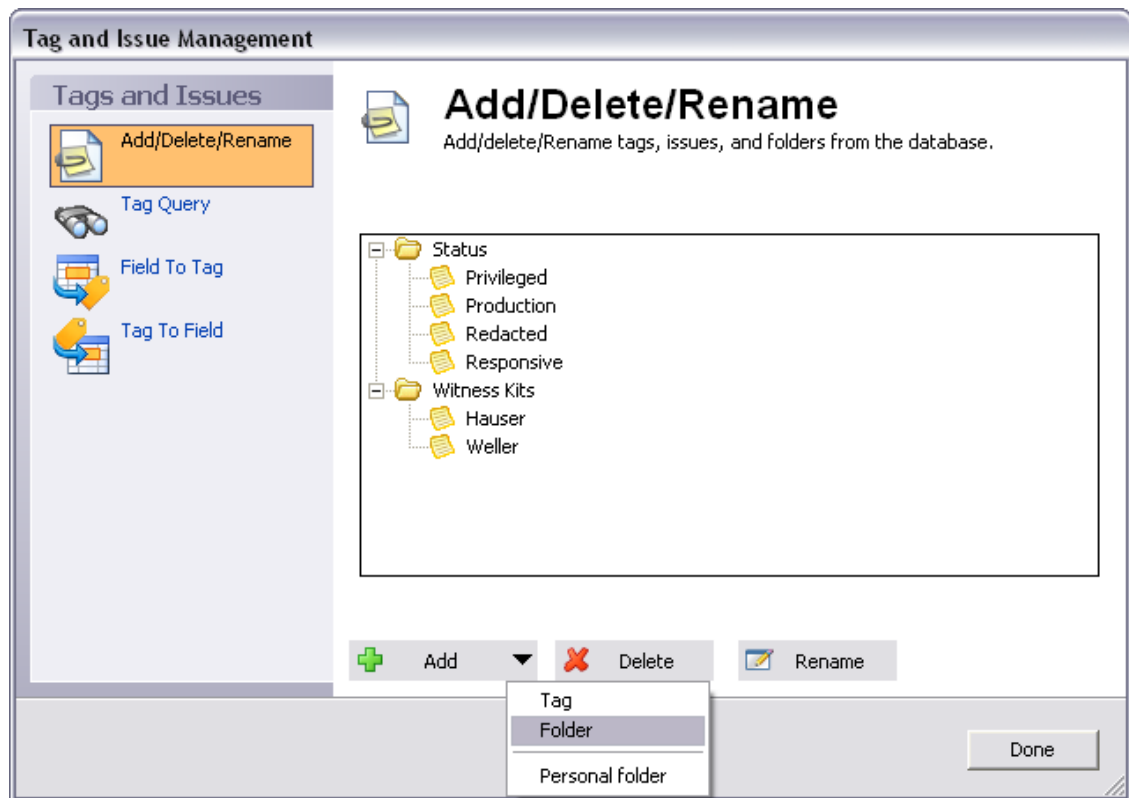
Personal folders are pink and can only be viewed by the user who created the folder. All public folders are yellow.

For more information about creating personal folders and tags, see Organizing tags.

4. To create a new tag, do one of the following:
 - To create a tag in a folder, right-click to select the folder, point to **New**, and then click **Tag**.
 - To create a tag outside of a folder, without selecting a folder, right-click in the **Tags** task pane, point to **New**, and click **Tag**.
5. Type the name of the new tag and then press **Enter**.

 To create tags and tag folders in the Tag and Issue Management dialog box:

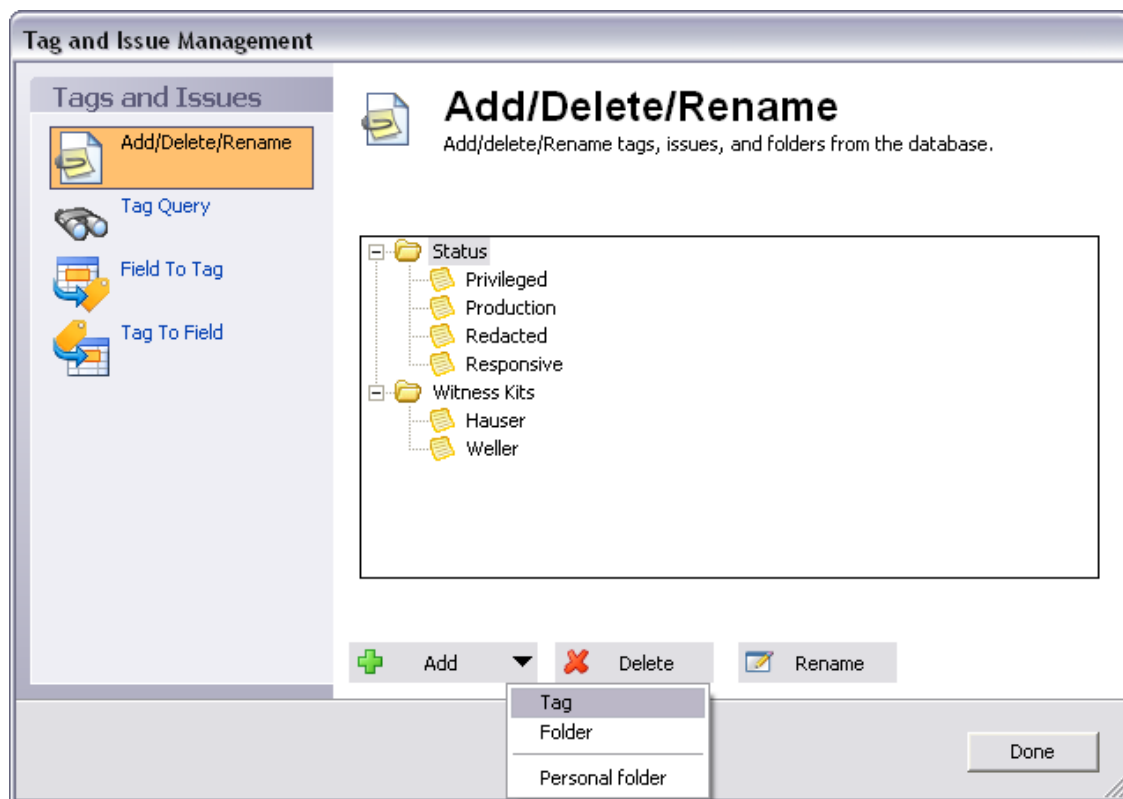
1. On the **Tools** menu, click **Manage Tags/Issues**.
2. In the **Tag and Issue Management** dialog box, to create a tag folder, do one of the following:
 - To create a tags folder, click the arrow next to the **Add** button, and click **Folder**.
 - To create a tags subfolder, click the parent folder, then click the arrow next to the **Add** button, and click **Folder**.



3. Type the name of the new folder and press Enter.

When you are creating a folder, you must add at least one tag to the folder, or the folder will not be saved. You cannot create empty folders.

4. In the **Tag and Issue Management** dialog box, to create a tag, do one of the following:
 - To create a tag in a folder, click the folder, click the arrow next to the **Add** button, and click **Tag**.
 - To create a tag outside of a folder, without selecting a folder, click the arrow next to the **Add** button, and click **Tag**.



5. Type the name of the new tag and press Enter.
6. When you are finished adding the tags and/or folders, click **Done**.

Your new folders and/or tags are displayed in the Tags panel in the Tags task pane.

To delete tags and folders:

Selected tags and issues can be deleted from the database. This permanently removes them from the database and cannot be undone. Folders are automatically deleted after all of the tags and issues in the folder are deleted. You cannot manually delete a folder.

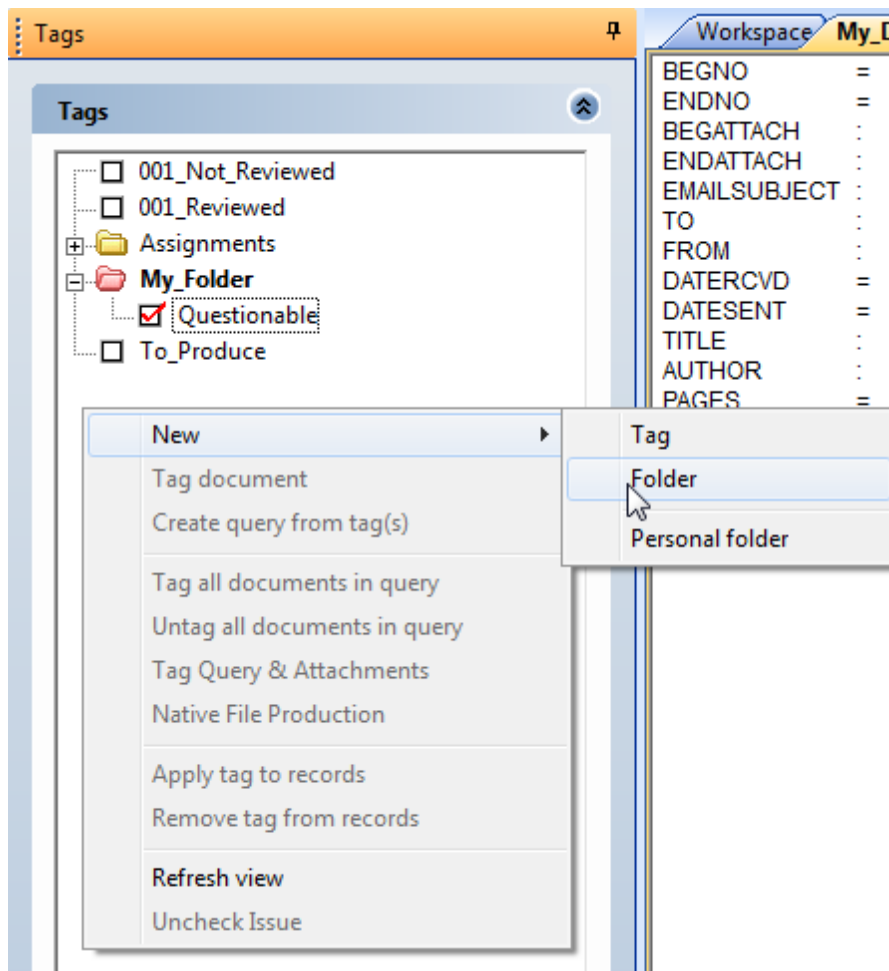
 Tags added to the database using the .ini file need to be removed from the .ini file first, and then deleted from the Add/Delete tab. Tags not removed from the .ini file remain in the database even after deleting them from the Add/Delete tab.

1. On the **Tools** menu, click **Manage Tags/Issues**.
2. In the **Tag and Issue Management** dialog box, click **Add/Delete**, select the tag you want to delete, and then click **Delete**.
3. When prompted, verify whether or not you want to delete the tag.
5. When finished, click **Done**.

The deleted tags are removed from the database and the Tags panel in the Tags task pane.

Organizing tags

Folders are used to organize similar types of tags, allowing you to easily focus on the tags that matter to you at that moment. Once a review has begun, you can review tag history and statistics to see what tags are applied to a document, who applied the tags and when. You can also perform queries on multiple tags or folders, allowing you to use a document's tag status as part of a complex search.



Creating Folders

When you create a folder you must add at least one tag to the folder, or the folder will not be saved. You cannot create empty folders.

To create a folder:

1. Open the **Tags** task pane.
2. In the **Tags** task pane right-click, point to **New**, and then click **Folder**.
3. Type the name of the new folder and then press Enter.
4. Right-click the new folder, point to **New**, and then click **Tag** to create a tag within the folder.
5. Type the name of the new tag and then press Enter.

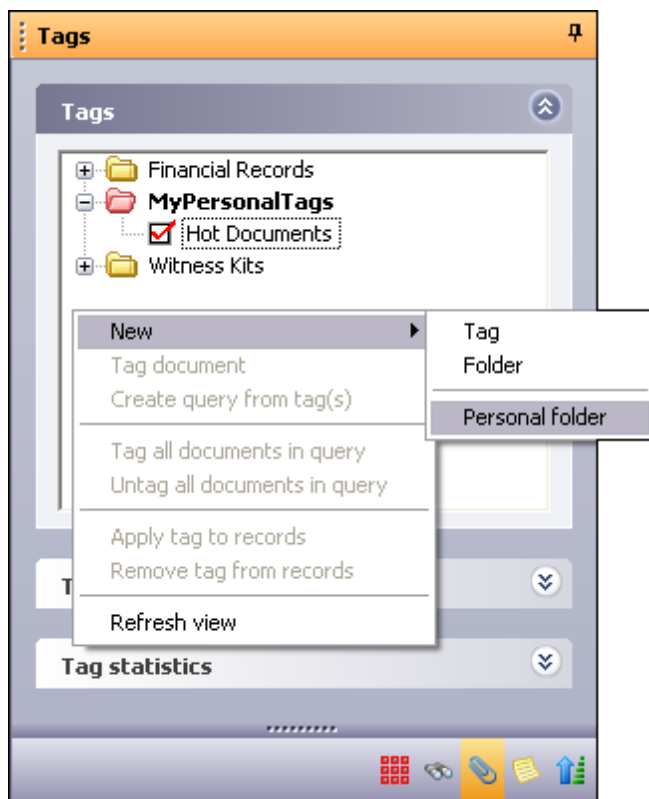
When you are creating a folder, you must add at least one tag to the folder.

To create a folder and set of tags for your individual review of documents, you can easily do so. For more information, see *Creating Personal Folders and Tags*.

If you need to remove a folder or tag, contact your Concordance 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. However, personal folders and tags are viewable by your Concordance administrator.



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 session. You cannot create empty folders.

 If you need to remove a folder or tag, contact your Concordance 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, it must have at least one tag in it. If you move all the tags out of a folder, the folder will be deleted.

Importing and Exporting Tags

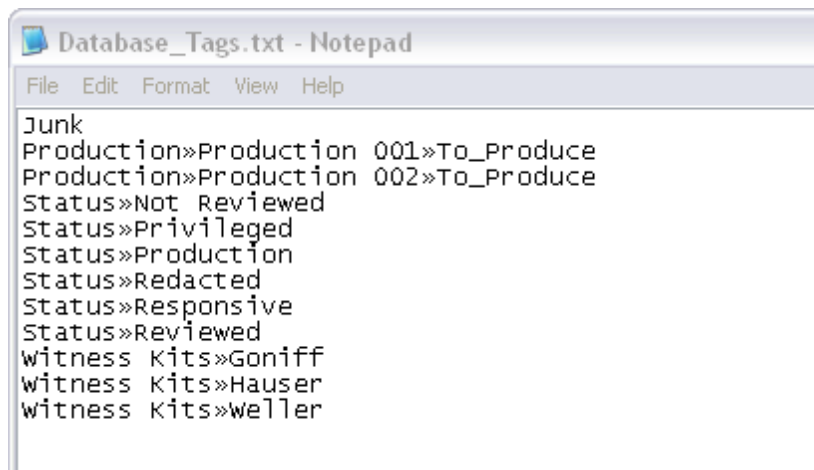
The Import Tags and Export Tags commands in the Tag and Issue Management dialog box provide the necessary tools to quickly copy tag structures between databases without having to create them manually. You can create a text file from scratch that contains a list of tags and folders similar in format to adding tags using the .INI file. The » ASCII character » (ASCII 187) is used to identify the folder structure for the tags.

 Tags and tag folders do not support Unicode characters or high-end ASCII characters. Only ASCII (values 032-126) characters are allowed. If a tag name or tag folder name contains an invalid character, you are prompted to make corrections.

When creating a tag file, each line represents a tag and every folder must have a tag. The text

file format should be written as follows:

Type	Structure	Example
Single Tag	Tag	Junk
Tag with Folder	Folder»Tag	Status»Reviewed
Nested Folders	Folder»Folder»Tag	Production»Production001»To_Produce



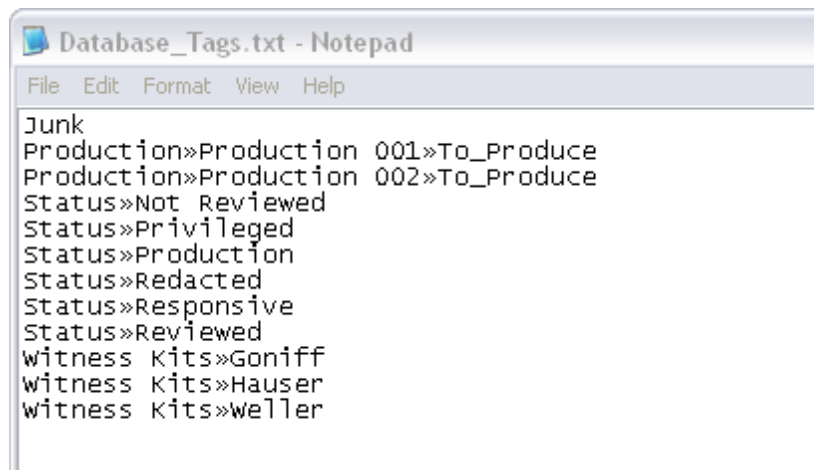
```
Database_Tags.txt - Notepad
File Edit Format View Help
Junk
Production»Production 001»To_Produce
Production»Production 002»To_Produce
Status»Not Reviewed
Status»Privileged
Status»Production
Status»Redacted
Status»Responsive
Status»Reviewed
Witness Kits»Goniff
Witness Kits»Hauser
Witness Kits»Weller
```

Example Tags .txt file for importing tag lists

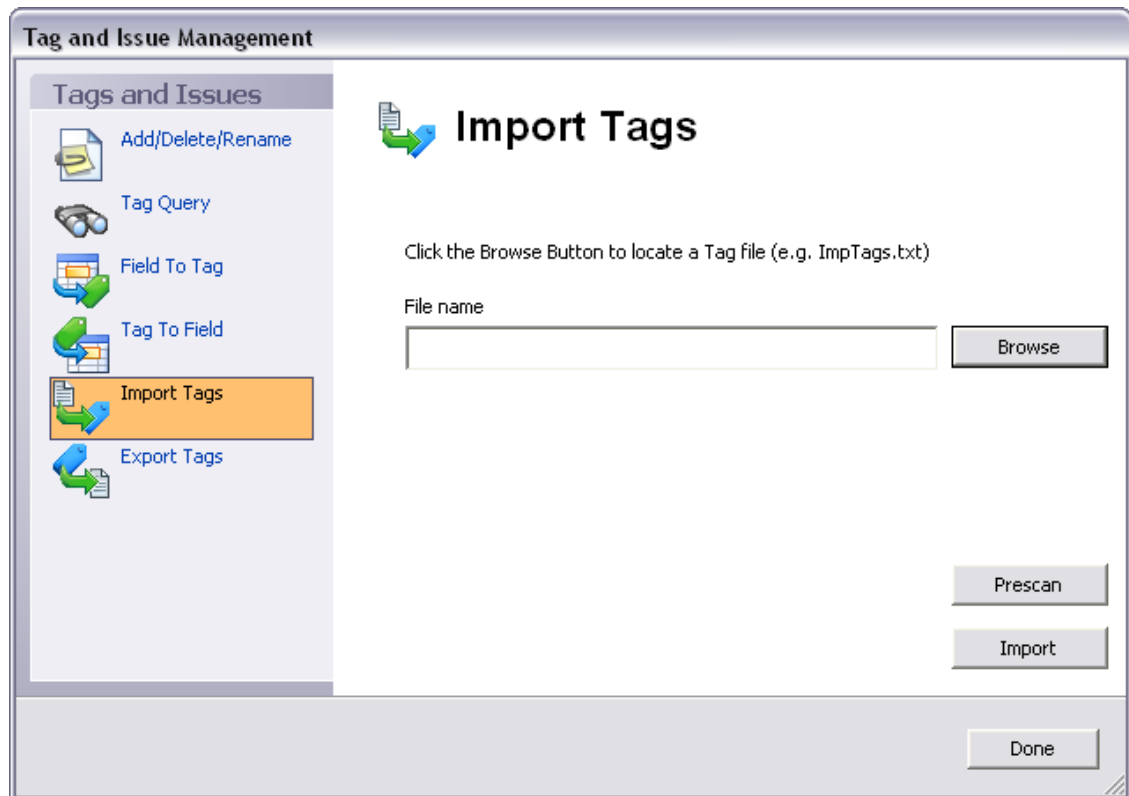
If you have an existing tag list setup in a Concordance database, you can export the tags and then import the file into any new or existing database. Only public folders and tags are exported, no personal folders and tags.

To import tags from a text file:

1. Make sure that the text file you want to import is formatted correctly.



2. On the **Tools** menu, click **Manage Tags/Issues**.



3. In the **Tag and Issue Management** dialog box, click **Import Tags**.
4. Click the **Browse** button, locate and select the text (.txt) file for the tags you want to import, and then click **Open**.
5. (Optional) Click the **Prescan** button to scan the file for unsupported characters, tag names that are longer than 199 characters, and any delimiter issues.
6. When the Prescan is complete, do one of the following:

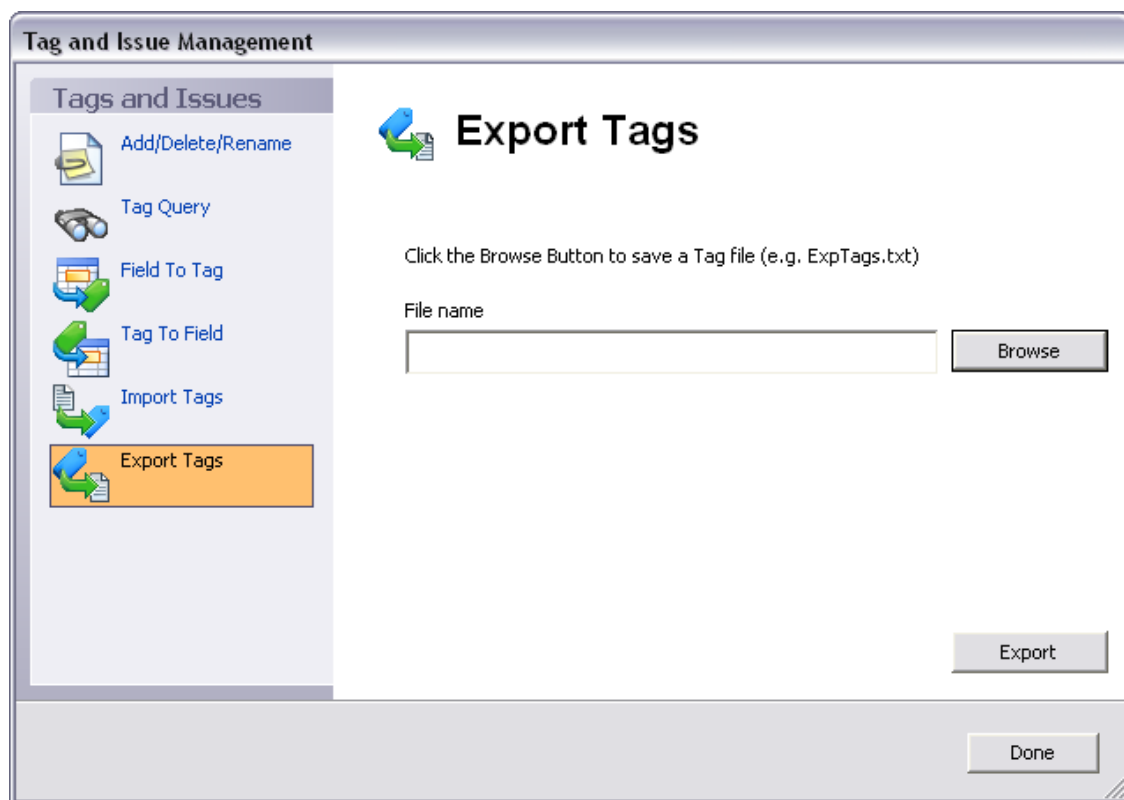
- If no errors are found, click **Done** to close the Prescan dialog box.
 - If errors are displayed in the dialog box, click the **Export** button to export the list to a comma separated (.csv) formatted file, find and fix any errors, and then rerun the **Prescan** to ensure all the errors have been resolved.
8. Click the **Import** button.
 9. When finished, click **Done** and then verify that the **Tags** pane contains the tags imported from the text file.

 To export tags to a text file:

1. On the **Tools** menu, click **Manage Tags/Issues**.

 Issue tags cannot be exported unless the tag is applied to a Concordance record.

2. In the **Tag and Issue Management** dialog box, click the **Export Tags** button.



3. Click the **Browse** button, navigate to the location where you want to save the tags text (.txt) file, and then click **Open**.
4. Click the **Export** button.
5. When finished, click **Done**, and then open the exported text file, and review the exported folders and tags.

Writing tags in the TRK file

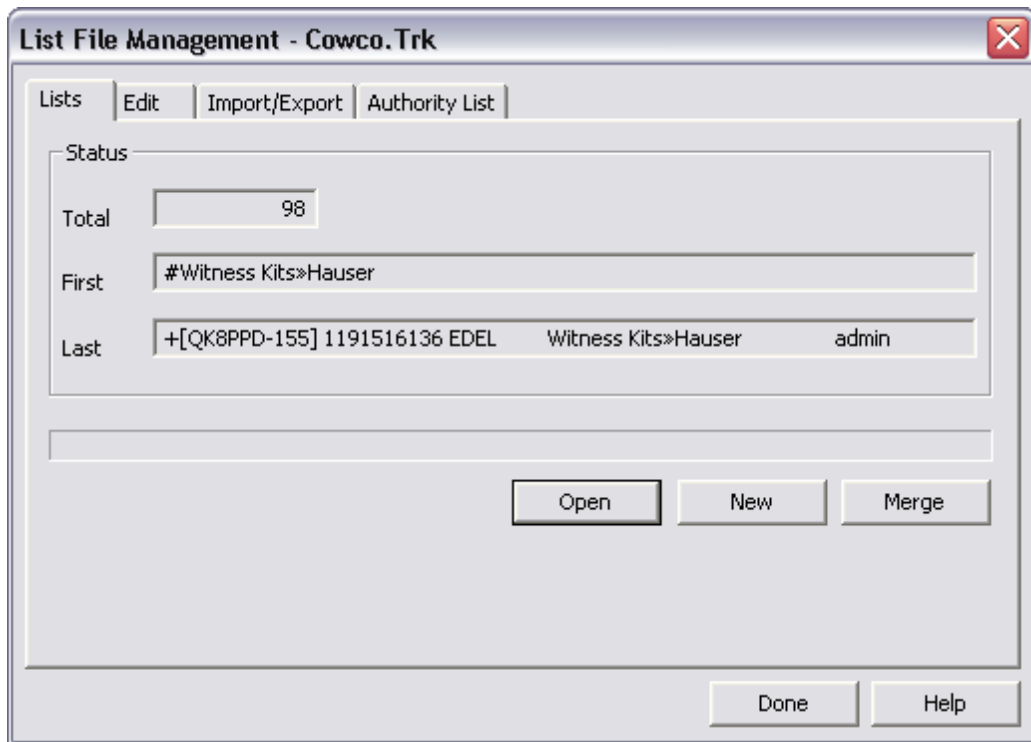
In addition to creating tags in the Tags task pane and the Tag and Issue Management dialog box, you can write tags directly into the .trk file. This is useful if you want to transfer many tags from one database to another database.

You can manually add individual tags to a database's .trk file, or can copy the tags from one database's .trk file to another database's .trk file.

To manually add a tag to a .trk file:

1. In Concordance, open the database you want to add a tag.
2. On the **Tools** menu, click **Manage List Files** to open the List File Management dialog box.
3. On the **Lists** tab, click the **Open** button.
4. In the Open dialog box, locate and open the database's .trk file.

The selected .trk file's data is loaded into the List File Management dialog box.



List File Management - Cowco.Trk

Lists | Edit | Import/Export | Authority List

Status

Total 98

First #Witness Kits»Hauser

Last +[QK8PPD-155] 1191516136 EDEL Witness Kits»Hauser admin

Open New Merge

Done Help

5. Click the **Edit** tab to view all of the records in the database's .trk file.
6. In the **Key** field, replace the existing text in the field with the new tag name, make sure that the tag name begins with the \$ symbol.

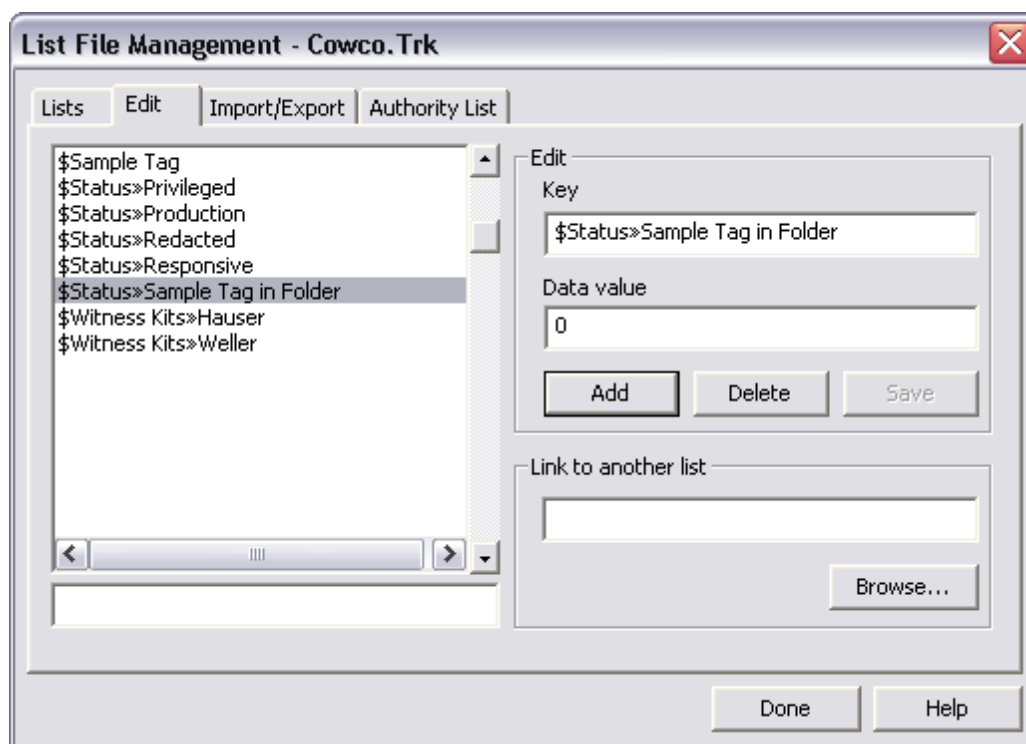
To add the tag to an existing tag folder or create the tag in a new folder, add the folder name before the tag name and separate the folder name and tag name with the » ASCII character 187. The character is used to identify the folder structure of the tag.

For more information about delimiter characters, see About delimiter characters.

Examples:

To add a tag, type \$Tag Name.

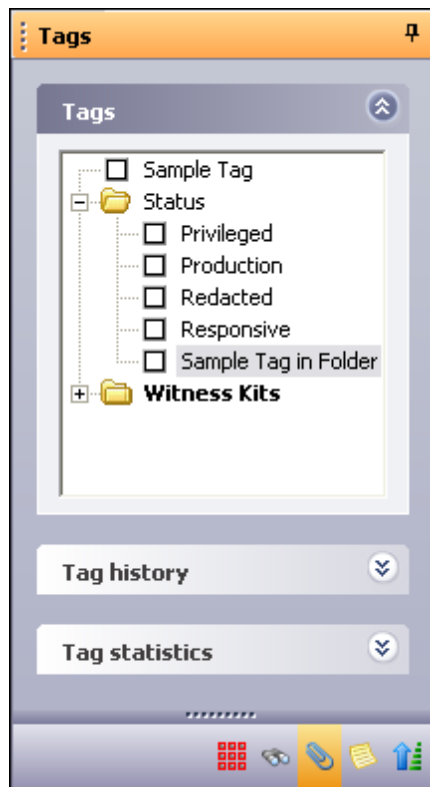
To add a tag to an existing or new tag folder, type \$Folder Name»Tag Name.



7. If this is a new tag that has not been applied to any documents in the database, type a zero in the **Data value** field.
8. Click the **Add** button.

Clicking the Add button adds the tag to the database's .trk file, and the record list on the Edit tab.
9. Click the **Done** button to close the **List File Management** dialog box.
10. Open the **Tags** task pane or **Tag and Issue Management** dialog box to verify that the new tag and tag folder are now displayed.

If the Tags task pane was open while you added the tag, the newly added tag and folder will not be displayed until you leave and reopen the Tags task pane. For example, open the Databases task pane and then reopen the Tags task pane.



To copy tags from one database to another:

To copy tags from one database to another, you first need to export the tags and then import the tags into the other database.

To export tags from a database:

1. In Concordance, open the database you want to copy tags from.
2. On the **Tools** menu, click **Manage List Files**.
Clicking Manage List Files opens the Lists tab in the List File Management dialog box.
3. Click the **Open** button.
4. Locate and open the database's .trk file.
Clicking Open loads the selected .trk file's data into the List File Management dialog box.

The screenshot shows the 'List File Management - Cowco.Trk' dialog box with the 'Lists' tab selected. The 'Status' section contains the following information:

Total	98
First	#Witness Kits»Hauser
Last	+[QK8PPD-155] 1191516136 EDEL Witness Kits»Hauser admin

Below the status section are three buttons: 'Open', 'New', and 'Merge'. At the bottom right are 'Done' and 'Help' buttons.

5. Click the **Import/Export** tab.

The screenshot shows the 'List File Management - Cowco.Trk' dialog box with the 'Import/Export' tab selected. The 'Import/Export' section has two radio buttons: 'Import' (unselected) and 'Export' (selected). The 'Data value delimiter' section has a checked box for 'Include data values' and three radio buttons: 'Comma' (selected), 'Other' (unselected), and 'Tab' (unselected). The 'Range' section has two radio buttons: 'All entries' (selected) and 'Range' (unselected). The 'From' field contains '#Witness Kits»Hauser' and the 'To' field contains '+[QK8PPD-155] 1191516136 EDEL Witness Kits»Hauser'. An 'Export' button is located at the bottom right of the 'Range' section. At the bottom right of the dialog are 'Done' and 'Help' buttons.

6. Select the **Export** option in the **Import/Export** section.

By default, in the Data value delimiter section, the Include data values check box is selected, the Comma delimiter option is selected.

List files exported or imported with both the key value and the data value must use a delimiter to separate them. The key entry is always first, followed by a delimiter, and then the numeric data value.

7. To export the database's tags, leave the **Include data values** check box selected, and select the applicable delimiter.

If the delimiter is not a comma or tab, click the Other option and select the applicable delimiter from the delimiter list.

The delimiters available from the delimiter list may appear as square symbols or may not be displayed. How this list is displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the delimiter list.

To see the list of available delimiter characters, see About delimiter characters.

8. In the **Range** section, select one of the following:
 - **All entries** – All entries in the database's .trk file are exported
 - **Range** – Only the range defined in the **From** and **To** fields is exported from the database's .trk file. If you select **Range**, in the **From** field type the first entry in the range, and in the **To** field, type the last entry in the range.

9. Click the **Export** button.

Clicking the Export button opens the Save As dialog box.

10. Browse to where you want to save the .txt file generated by the export, type the .txt file name in the **File name** field, and click **Save**.

Clicking Save saves the .txt file in the directory you selected and closes the Save As dialog box.

11. Click the **Done** button to close the **List File Management** dialog box.

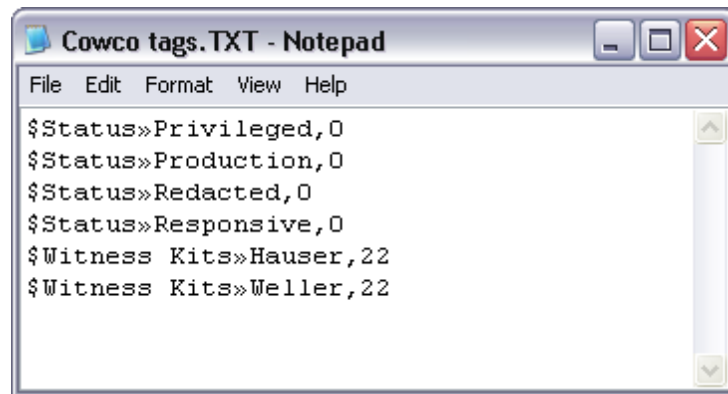
12. In any text editor program, navigate to and open the exported .txt file.

Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

All Concordance database tag and tag folder entries in the exported .txt file begin with a \$ symbol.

13. Select all records in the .txt file that do not begin with the \$ symbol, and delete them.

There should now only be tag and tag folder records in the .txt file.



14. Save the modified .txt file and close the file.

If you do not want to overwrite the originally exported .txt file, be sure to save the modified .txt file with a different file name.

 To import tags from another database:

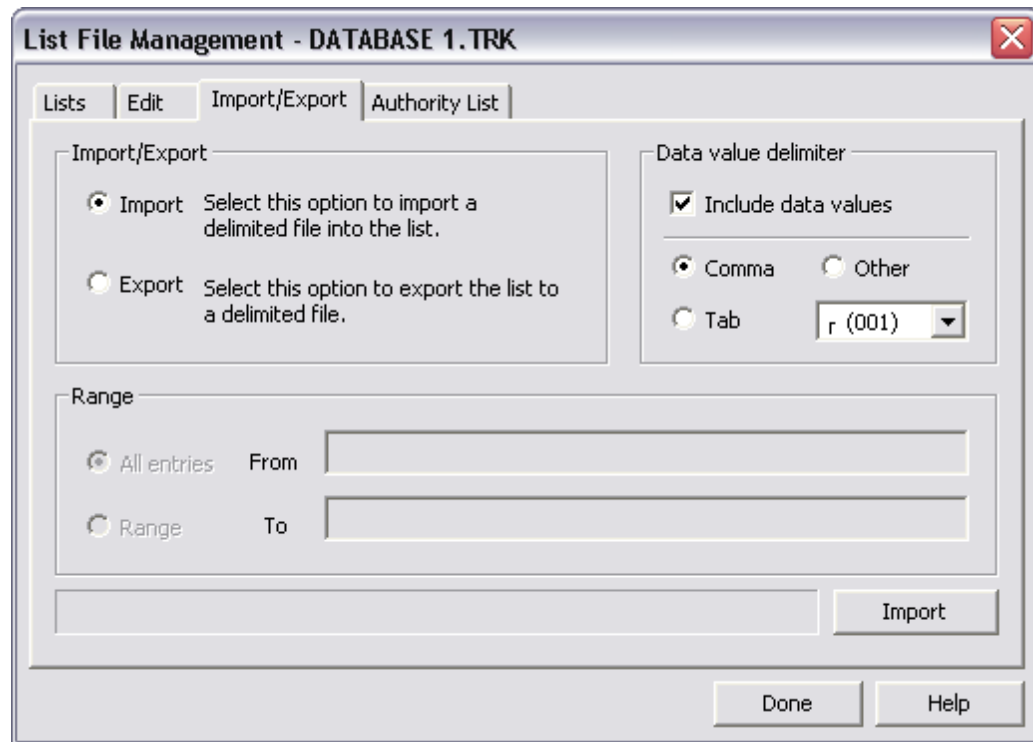
1. In Concordance, open the database you want to copy the tags from.
2. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

3. Click the **Open** button.
4. Locate and open the database's .trk file.

Clicking open loads the selected .trk file's data into the List File Management dialog box.

5. Click the **Import/Export** tab.



6. In the **Import/Export** section, select the **Import** option.

By default, in the Data value delimiter section, the Include data values check box is selected, the Comma delimiter option is selected.

List files exported or imported with both the key value and the data value must use a delimiter to separate them. The key entry is always first, followed by a delimiter, and then the numeric data value.

7. To import the tags .txt file from the other database, leave the **Include data values** check box selected, and select the applicable delimiter option.

If the delimiter is not a comma or tab, click the Other option and select the applicable delimiter from the delimiter list.

The delimiters available from the delimiter list may appear as square symbols or may not be displayed. How this list is displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the delimiter list.

To see the list of available delimiter characters, see About delimiter characters.

The options in the Range section are not used during the import.

8. Click the **Import** button.

Clicking the Import button opens the Open dialog box.

9. Browse to where you saved the modified tags .txt file, click the file name, and click **Open**.

Clicking Open imports the tags and tag folders in the modified tags .txt file into the database.

10. Click the **Done** button to close the **List File Management** dialog box.
11. Open the **Tags** task pane or **Tag and Issue Management** dialog box to verify that the imported tags and tag folders are now displayed.

If the Tags task pane was open while you imported the tags, the imported tags will not be displayed until you leave and reopen the Tags task pane. For example, open the Databases task pane and then reopen the Tags task pane.

Writing tags in the INI file

One method of creating a permanent tag structure is to write tags directly into an INI file. A database's INI file stores various database configuration settings. Tags created in this file cannot be deleted in the Tag and Issue Management box.

When tags are created in Concordance or in the TRK file, the tags are not automatically written to the .ini file. To add tags to the .ini file, you need to manually write them into the file. Once tags are written in the .ini file and available in the Tags task pane. Once a tag is applied, the tags are automatically written to the .trk file.

The » ASCII character is used to identify the folder structure of the tag. The ASCII character for this symbol is 187. You can create a shortcut for the symbol in Microsoft Word on the Symbols tab in the Symbol dialog box. For example, you can create a shortcut of F10+K for this character.

For more information about delimiter characters, see About delimiter characters.

Once you have written tags to an .ini file, you can save time creating tags for another database's .ini file by copying and pasting the entries from one database .ini file to another.

- ✍ If you are renaming tag or tag folder names in the .ini file, the Tags pane displays both the original and renamed tags. Renaming tags does not affect *.ini file tags.

To write tags in the .ini file:

1. Navigate to the database's .ini file.

The .ini file is stored in the same directory as the database .dcb file.

2. Open the .ini file in any text editor program.

- INI files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

In the .INI file, the different database configuration settings are designated by the [] symbols around the configuration category. For example, field groups are listed under [FieldGroups], and added menu items are listed under [AddedMenuItems].

Tags are added after the [Tags] category, and each tag has a separate line in the .ini file.



- If the .ini files does not have a tags list, type **[Tags]** in a new line to create the tags list.
- Add the tags below the **[Tags]** line using the following format:
 - To add a tag outside of a folder, type: **Tag#=Tag_Name**
 - To add a tag within a folder, type: **Tag#=Folder_Name»Tag_Name**
 - To add a personal folder and tag, type: **Tag#=»UserID»Personal_Folder_Name»Tag_Name**

Use underscore characters to indicate spaces in a tag or folder name.

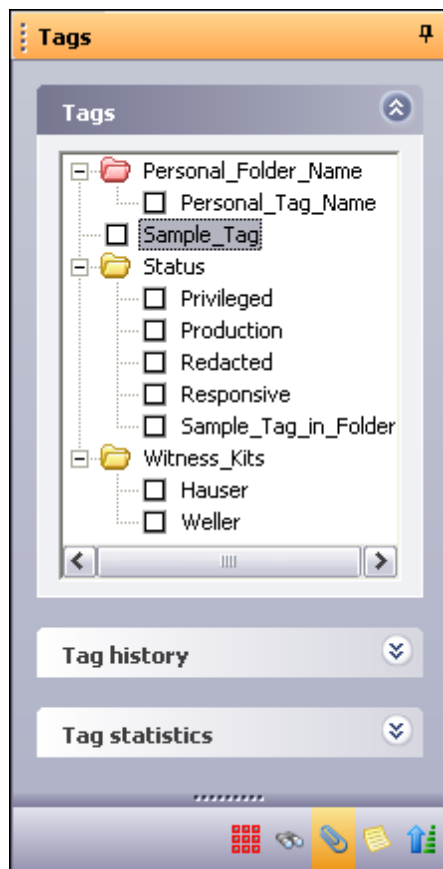
- To enter the ASCII character, », press ALT+0187 on the number pad. If you are using a laptop, press ALT+FN+0187 (blue numbered keys - UILKJ and M).

In the image above, one tag, *Sample tag*, was created outside of a folder. There are five tags, Privileged, Production, Redacted, Responsive, and Sample Tag in Folder, created in the Status Folder, there are two tags, Hauser and Weller, created in the Witness Kits folder, and a personal folder and tag.

- Save and close the modified .ini file.
- Open the database in Concordance.
- Open the **Tags** task pane to verify that the tags and folders you added are displayed.

If the Tags task pane was open while you wrote tags to the database's .ini file, the tags you added will not be displayed until you leave and reopen the Tags task pane. For

example, open the Databases task pane and then reopen the Tags task pane.



Creating tags from data

The Field To Tag feature copies the contents from a selected field and uses that content to create tags in the Tags pane.

- When selecting a field to create a tag from, ensure that you select a field that is listed before your OCR numbered fields.
Example:

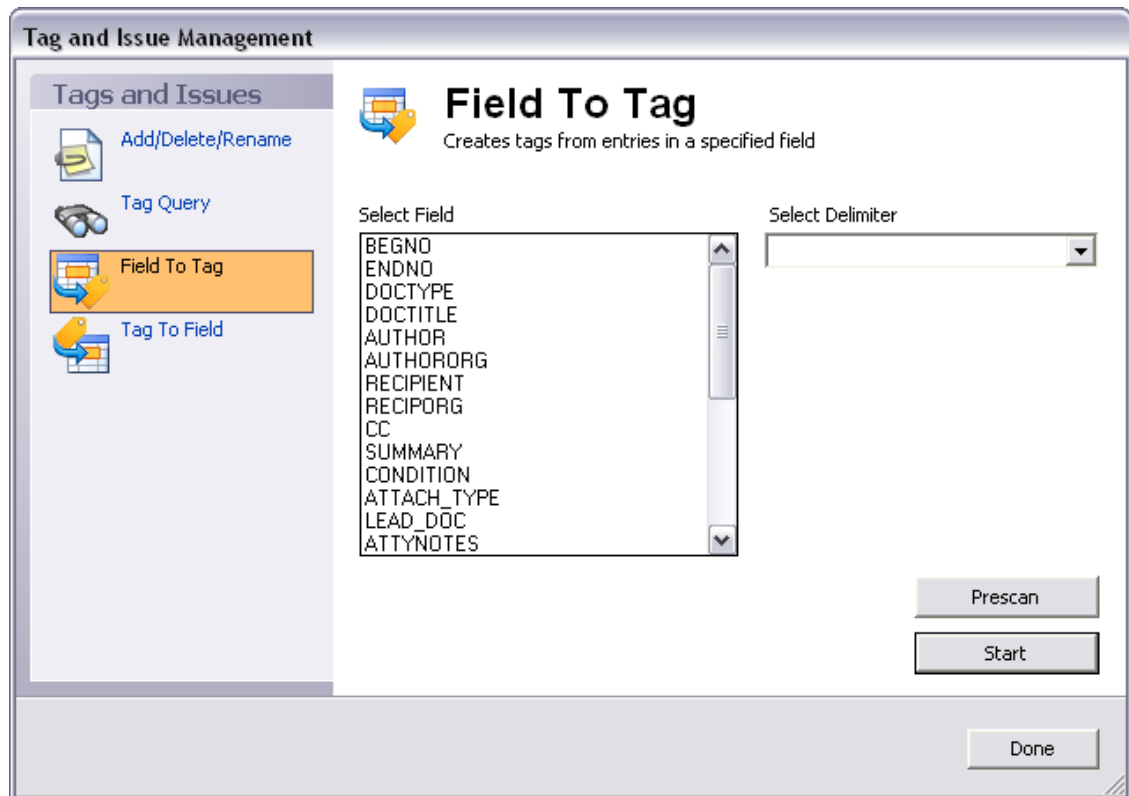


In this example, we are selecting the ADMIN field, which appears before the OCR1 field.

- Tags and tag folders do not support Unicode characters. Only ASCII (values 032-126) characters are allowed. If a tag name or tag folder name contains an invalid character, you are prompted to make corrections. Use the Prescan option to scan the field data for any invalid tag names.

Creating tags from data within a specified field

1. On the **Tools** menu, click **Manage Tags/Issues**.
2. In the **Tag and Issue Management** dialog box, click the **Field To Tag** button.



3. From the **Select Field** list, select the field for the values you want to convert to tags.
Ensure that you select a field that is listed before your OCR numbered field.
4. From the **Select Delimiter** list, select the delimiter to use to separate the tags in the field.
5. (Optional) Click the **Prescan** button to scan the data in the specified field for unsupported characters, tag name size (limited to 199 characters) and delimiter issues.
Any resulting errors are displayed in the Prescan dialog box.
6. When the Prescan is complete, do one of the following:
 - If no errors are found, click **Done** to close the Prescan dialog box.
 - If errors are found, click the **Export** button to export the list to a comma separated (.csv) formatted file, find and fix any errors, and then rerun the **Prescan** to ensure all the errors have been resolved.
7. Click the **Start** button.
8. When finished, click **Done**, and then verify that the Tags pane contains the tags that match the values in the specified field. For every value in the field, you should have a matching tag.

Applying tags to queries

As an administrator, you may find that searching for a batch of documents first and then applying a tag to the query is more efficient than tagging individual records one at a time. This tactic may be useful if you are pre-categorizing tagged documents into folders for the review team or gathering documents for witness kits.

To apply tags to queried documents:

You can apply tags to queried documents from the Tags task pane and the Tag and Issue Management dialog box. For more information about adding or removing tags from queries in the Tags task pane, see Tagging records.

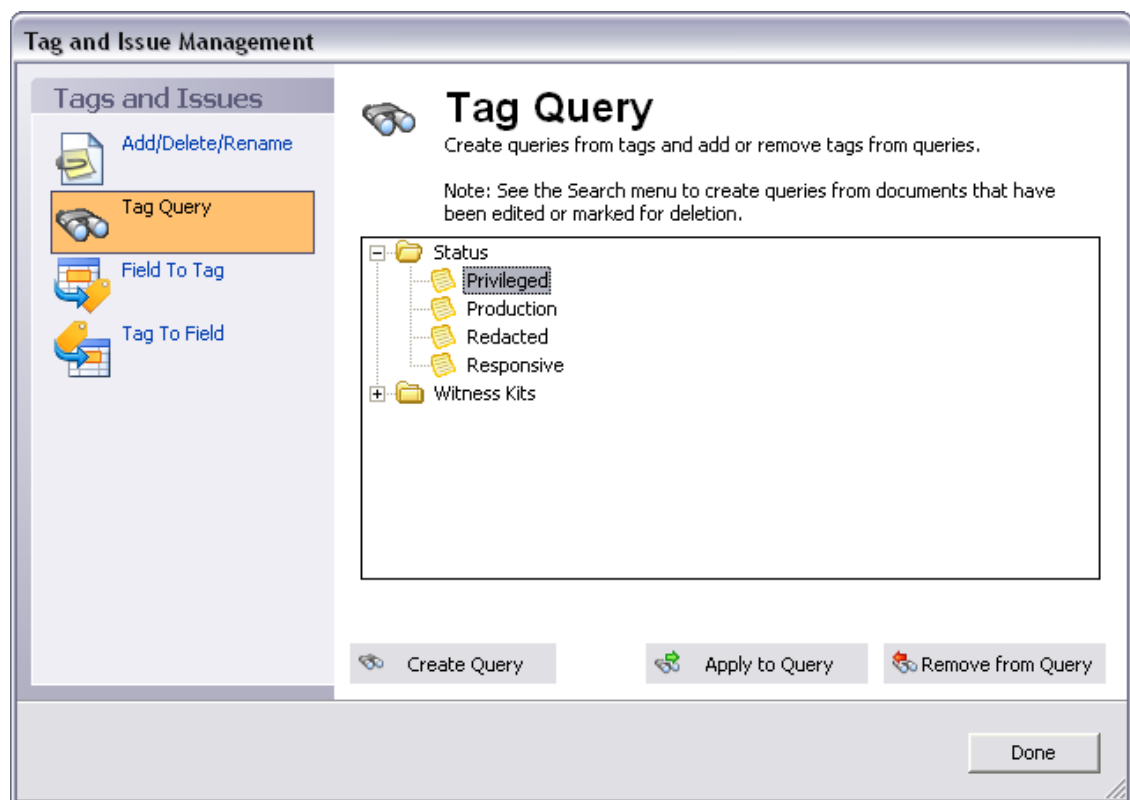
1. Run a search for the documents you want to locate and tag.

For more information about searching, see Available search tools.

2. On the **Tools** menu, click **Manage Tags/Issues**.

Clicking Manage Tags/Issues opens the Add/Delete tab in the Tag and Issue Management dialog box.

3. Click the **Tag Query** tab.



4. Click the tags you want to apply to the documents in the query you ran.

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

5. Click the **Apply to Query** button.

The number of tags applied displays in the bottom right corner of the dialog box.

To remove tags from the current query, select the tags on the Tag Query tab and click the Remove from Query button.

Querying tags and folders

Running a query from a tag is a simple way to locate all records that have a particular tag applied to them. You can also query a tag folder to locate all tagged documents within a folder.

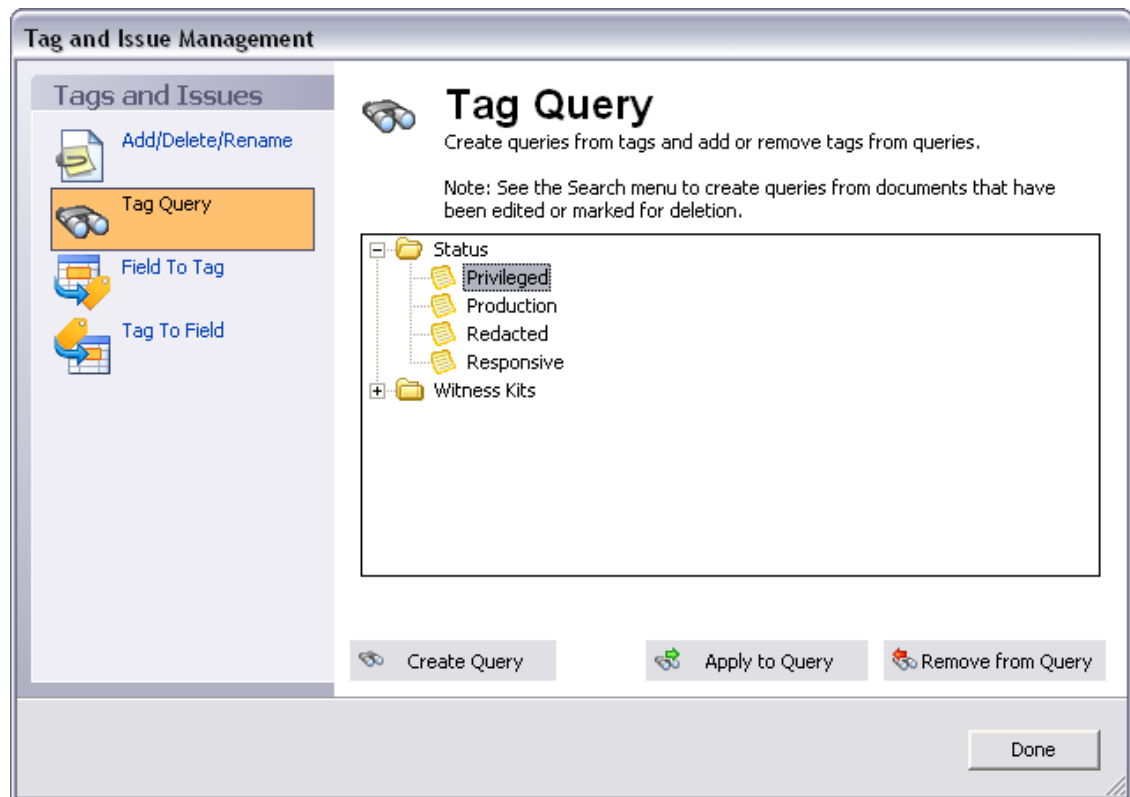
To query tags and folders:

You can query tags and folders from the Tags task pane and the Tag and Issue Management dialog box. For more information about querying tags and folders in the Tags task pane, see [Creating queries from tags](#).

1. On the **Tools** menu, click **Manage Tags/Issues**.

Clicking Manage Tags/Issues opens the Add/Delete tab in the Tag and Issue Management dialog box.

2. Click the **Tag Query** tab.



3. Click the tags and/or folders you want to create a query.

To select multiple tags and folders, use CTRL+click or SHIFT+click.

4. Click the **Create Query** button.

Clicking the Create Query button generates the query for the selected tags and/or folders. The number of documents found in the query is displayed in the bottom right corner of the Tag and Issue Management dialog box.

Concordance stores all searches from a current session in the Review view. Your new query is listed in the query list in the Review view.

Related Topics

Reviewing search queries
Running previous search queries

Managing tags and folders

On occasion you may need to add/remove, reorganize, or rename a tag or tag folder due to a

misspelling or shift in document categorization during case review phases. This process is not the same as renaming a folder or tag in a Microsoft Word or Outlook menu tree. In Concordance the process should be controlled by administrators to ensure that ample backups and tag history is captured before the tag and folder structure is altered.

For more information about reviewing and capturing tag history, see [Storing tag history](#).

For more information about backing up tags, see [Backing up tags](#).

Using the Tag and Issue Management dialog box, you can add/remove, reorganize, and rename tags and tag folders in the current database. Concordance verifies that only one *named* tag or folder is present within the same hierarchy. If tag or folder with the same name already exists, Concordance prompts you to rename the tag or folder. Concordance then automatically updates all records with the new tag name.

✍ Before renaming a tag or tag folder, it is best practice to run the `TagHistoryandStoreIt_v[version #].cpl` to capture a current query of all tag history before transferring documents to a new tag.

✍ The maximum length for tag names is 199 characters.

Reorganizing tags and tag folders

1. On the **Tools** menu, click **Manage Tags/Issues**:
2. In the Tag and Issue Management dialog box, on the **Add/Delete/Rename** tab, do any of the following:
 - To move a single tag from one folder to another folder, select the tag and drag to the new folder.
 - To move multiple tags, press CTRL and click the tags to move, and then drag the tags to the new folder.
 - To move a folder and all the tags in the folder, click the folder and drag to the new location.
 - To move multiple folders, press CTRL and click the folder to move, and then drag the folders to the new location.

⚠ For a tag folder to exist in Concordance, it must have at least one tag in it. If you move all the tags out of a folder, the folder will be deleted.

To rename tags and tag folders:

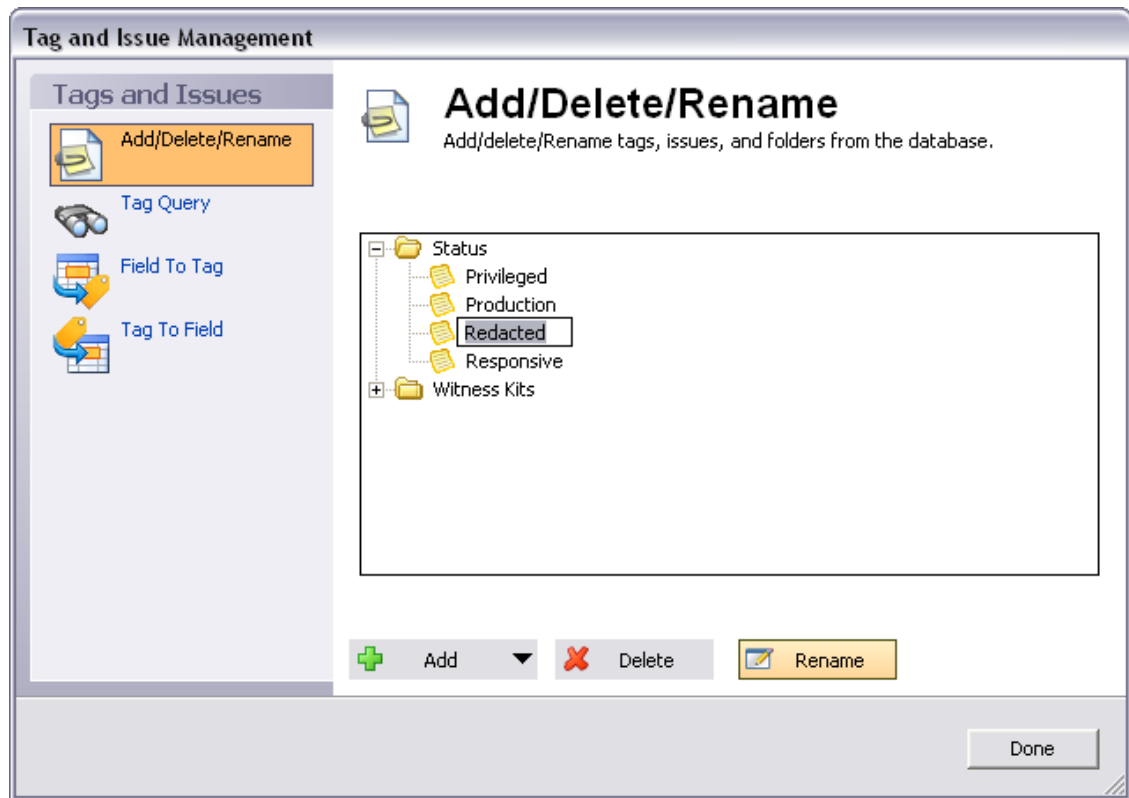
1. Run the **TagHistoryandStoreIt_v[version #].cpl** to capture a current query of all tag history before transferring documents to a new tag.

The default directory for the CPL folder installed with Concordance is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\CPL (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\CPL (Windows 7)*. For more information about CPLs, see [About the Concordance Programming Language Reference](#) and `TagHistoryAndStoreIt_v10.00`.

2. On the **Tools** menu, click **Manage Tags/Issues**.
3. In the **Tag and Issue Management** dialog box, click the tag or folder you want to

rename, and then click **Rename**.

4. Enter the new tag or folder name.



- ✎ The Manage Tags/Issues dialog box does not allow non-ASCII characters for tag or tag folder names. You can add non-ASCII character tag and tag folder names using CPLs or INI files.

5. Repeat steps three and four for each tag or folder you want to change.
6. When finished, click **Done**.

Concordance automatically updates all tagged records with the new tag name.

7. Review the queried records to ensure the tag or folder name is updated.

Related Topics

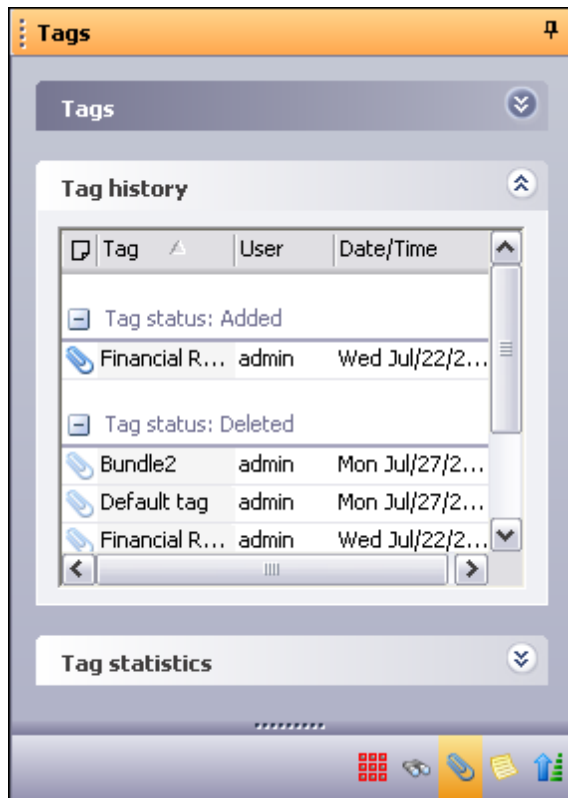
Viewing tag statistics
Viewing tag history
Storing tag history
Backing up tags

Viewing tag history

The Tag history panel displays two types of information:

- **Added Tags** - tags that exist on the current document record, including who applied the tag and when it was applied.
- **Deleted Tags** - tags that previously existed on the current document record, but are now removed, including who deleted the tag and when.

As you navigate records, your tag history changes to reflect the history of each selected document.



To review tag history:

1. Select a document record that has been tagged.
2. Open the **Tags** task pane and select the **Tag history** panel.
3. Scroll to view all tags that are applied and removed from the current document.
4. Click the plus or minus sign next to the tag status to view or hide a category listing.

Storing tag history

The TagHistoryAndStoreIt_v[version #].cpl allows you to take the information from the Tag history panel in the Tags task pane and place it into a field for the purpose of searching, backups or storing historical information.

Storing a database's tag history can help you track tagging issues, such as a user accidentally bulk un-tagging a group of documents. The information captured by the TagHistoryAndStoreIt_v[version #].cpl allows you to run relational searches on specific tags, users, and the date that an event occurred.

Tag history will also need to be stored when using the Export as a Concordance Database feature because the export includes a database's current tagging information, but does not include the tag history.

For more information about the exporting Concordance databases, see About backing up databases and Exporting databases.

By default, the CPL places all of the tag history for a query of documents into the TAGINFO field. If you want to store the tag history in different field in your database, you need to replace the TAGINFO field name with the other field name in the TagHistoryAndStoreIt_v[version #].cpl file before running the CPL.

If your database has an existing field named TAGINFO, then you do not need to modify the CPL before running the CPL.

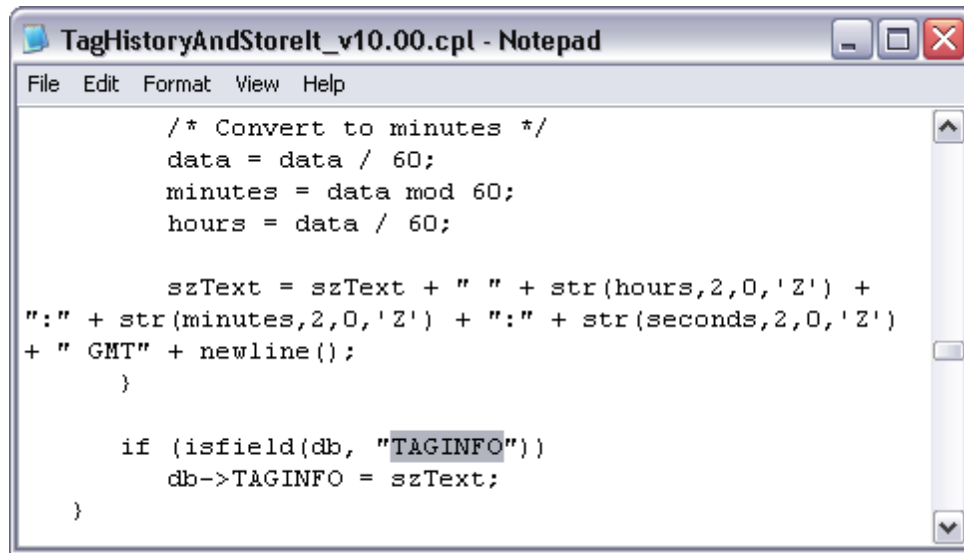
To change the tag history field in the CPL:

1. Open the CPL using a text editor.

To open the CPL, right-click the **TagHistoryAndStoreIt_v[version #].cpl** file, point to **Open**, and click **Notepad** or any other text editor program you have.

 Delimited text files can be opened with any text editor program, such as Notepad. We recommend using an advanced text editor program like TextPad or UltraEdit.

2. Search and replace all references to the TAGINFO field with the name of the field you want to use to store your tag history. If you have an existing field named TAGINFO, then you will not need to modify the cpl.



```

/* Convert to minutes */
data = data / 60;
minutes = data mod 60;
hours = data / 60;

szText = szText + " " + str(hours,2,0,'Z') +
":" + str(minutes,2,0,'Z') + ":" + str(seconds,2,0,'Z')
+ " GMT" + newline();
}

if (isfield(db, "TAGINFO"))
    db->TAGINFO = szText;
}

```

3. Save your changes and close the **TagHistoryAndStoreIt_v[version #].cpl** file.

To store tag history:

1. In Concordance, on the **Standard** toolbar, click the **All** button to query all records in your database.
2. On the **File** menu, click **Begin program**.
3. Navigate to the CPL directory installed with Concordance, and click the **TagHistoryAndStoreIt_v[version #].cpl** file.

The default directory for the CPL folder installed with Concordance is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\CPL (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\CPL (Windows 7)*. For more information about CPLs, see About CPLs and TagHistoryAndStoreIt_v10.00.

4. Click **Open**.

After clicking Open, the CPL automatically extracts your tag history from each database record and adds the tag history to the TAGINFO field, or its equivalent, for each record.

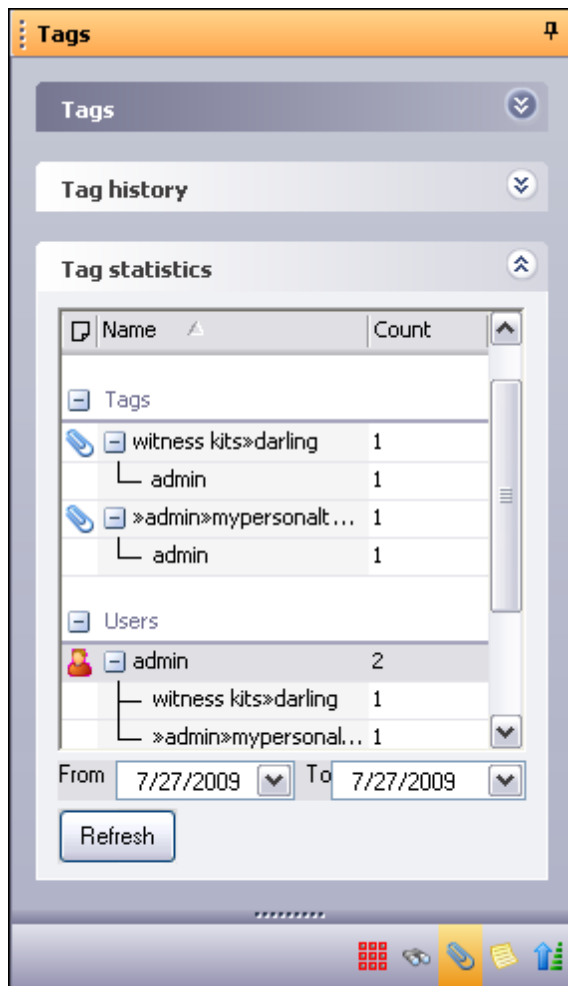
5. Open the **Browse** view and locate the field where you placed the tag history.

The tag history lists the tags that were added to and removed from the record, when the tags were added or removed, and by whom.

TAGINFO	:	Record number: 1		
		Accession number: 1		
		Serial number: [RZ8RBB-1] 1248899837 USER		
		Tags added:		
		+ [RZ8RBB-1] 1248899837 USER	Status»Responsive	UserID
		on 07/29/2009 23:10:00 GMT		
		+ [RZ8RBB-1] 1248899837 USER	Witness Kits»Goniff,JA	UserID
		on 07/29/2009 23:14:04 GMT		
		Tags deleted:		
		- [RZ8RBB-1] 1248899837 USER	Witness Kits»Goniff	UserID
		on 07/29/2009 23:14:36 GMT		

Viewing tag statistics

The Tag statistics panel allows you to monitor the tags applied, in categories by tag or reviewer, for a certain time frame. This feature is useful when monitoring an individual's review progress.



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.

Tracking tags in the TRK file

To track and manage your tags, you can review the .trk file that references all tags set in the system at a given time. All tag information is stored in the .trk file, which includes three sections:

- **Index Section** - Review the index to see how many tags a document has applied to it. For example, if there are 10 documents in a database with three tags applied to each document, then there would be 30 records in this section. Every record in the index begins with a hash mark (#).
- **Tag List** - Review this list to locate tag names in your database. One record exists for each unique tag name in the database. So if there were three tags in the database, there would be three records in the tag list. Each record stored in this list begins with a dollar sign (\$).
- **Tag History** - Review these items for added and deleted tags. Every record in this section begins with a plus or minus sign (+ or -).

✍ In the .TRK file, personal folders and the tags in the folder are preceded by the » character and the user's Windows login or security user ID.

- Personal folders are displayed in the following format:

»UserName»Personal Folder Name»Tag Name

- Public folders are displayed in the following format:

Folder Name»Tag Name

List File Management - Cowco.Trk

Lists | Edit | Import/Export | Authority List

#Reviewed
 #Witness Kits»Hauser
 \$Status»Privileged
 \$Status»Production
 \$Status»Redacted
 \$Status»Responsive
 \$Witness Kits»Hauser
 \$Witness Kits»Weller
 +[QK8PPD-1] 1191516136 EDEL Witne
 +[QK8PPD-3] 1191516136 EDEL Witne
 +[QK8PPD-6] 1191516136 EDEL Revie
 -[QK8PPD-24] 1191516136 EDEL StatL
 -[QK8PPD-25] 1191516136 EDEL StatL
 -[QK8PPD-26] 1191516136 EDEL StatL
 -[QK8PPD-32] 1191516136 EDEL StatL
 -[QK8PPD-33] 1191516136 EDEL StatL

Edit

Key: #Reviewed
 Data value: 5

Add Delete Save

Link to another list: Browse...

Done Help

To review the .trk File

1. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. Click the **Open** button to open the **Open** dialog box.

3. Browse to and click the database's .trk file, and click **Open**.

Clicking Open loads the selected .trk file's data into the List File Management dialog box.

4. Click the **Edit** tab.

All of the records in the database's .trk file are listed on the Edit tab.

5. Review the tag information in the .trk file.

6. When finished, click **Done** to close the **List File Management** dialog box.

Scanning and repairing the TRK file

In Concordance, database administrators can either scan or scan and repair the .trk file. The TRK Maintenance Tool scans all tags in the currently open database and, if necessary, cleans up SQLite table entries in the .trk file (e.g., broken links or orphaned entries).

Each time the TRK Maintenance Tool runs the scan only or repair/scan option, it generates a .csv file report that is saved in the database directory. The TRK Maintenance Tool report includes the following information:

- Full path and name of the .trk file
- Number of errors found
- Number of orphaned tags
- The name of each orphan tag in the file and the number of documents containing each tag
- Number of missing tag links
- Total number of tags
- The name of each tag in the file and the number of documents containing each tag
- Total number of documents tagged

The TRK Maintenance Tool, like indexing, is an exclusive Concordance process that requires all users, except the database administrator, to be logged out of the database when the process runs.

- ✎ The TRK Maintenance Tool is designed to run on individual Concordance databases. The tool does not run on concatenated database sets.

To scan the .TRK file:

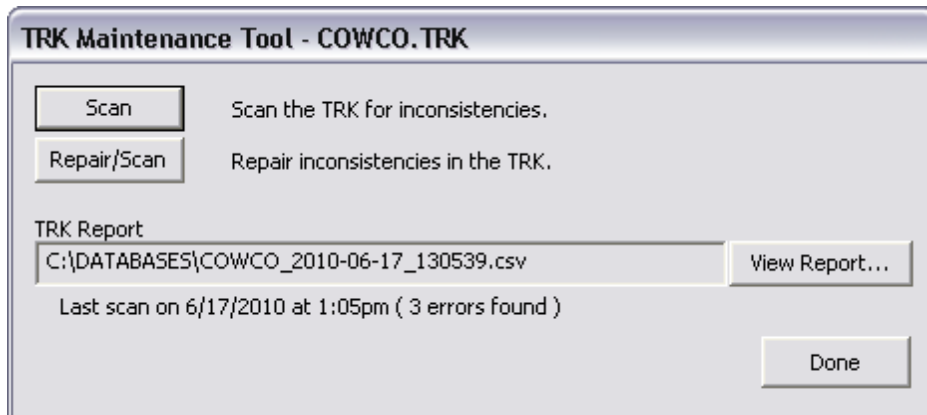
1. In Concordance, open the database associated with the .TRK file.
2. On the **File** menu, point to **Administration**, and click **TRK Maintenance Tool**.

Clicking TRK Maintenance Tool opens the Administration dialog box.



3. In the **User** field, type the administrator's user ID.
4. In the **Password** field, type the administrator's password.
5. Click **OK**.

Clicking OK opens the TRK Maintenance Tool dialog box.



6. Click the **Scan** button to scan the .trk file.

When the scan is completed, the *Scan complete* message is displayed.

7. Click the **Done** button to close the message.

The file name and path for the report generated by the TRK Maintenance Tool during the initial scan is displayed in the TRK Report field. A date and time stamp for the last scan and the number of errors found during the scan is displayed below the TRK Report field.

8. Click the **View Report** button to open the TRK Maintenance Tool report in Microsoft Excel.

The TRK Maintenance Tool report is stored in the database directory with the following naming convention, [database name]_[scan date]_[scan time].csv.

 To scan and repair the TRK file:

1. In Concordance, open the database associated with the .TRK file.
2. On the **File** menu, point to **Administration**, and click **TRK Maintenance Tool**.

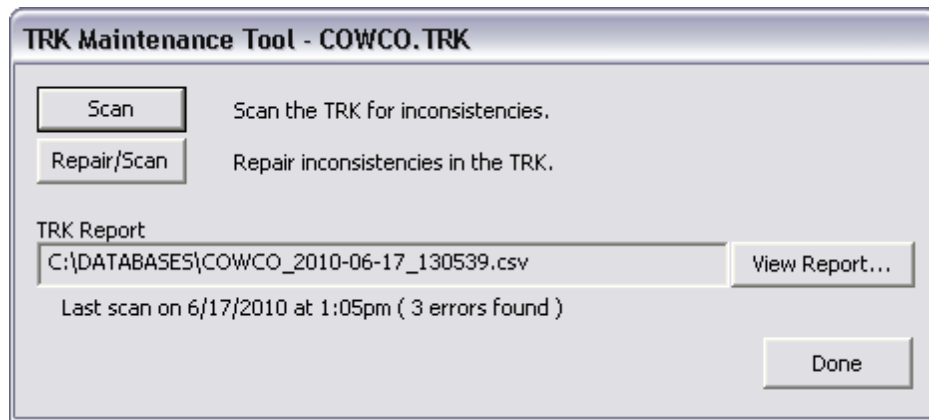
Clicking TRK Maintenance Tool opens the Administration dialog box.



The Administration dialog box has a title bar with a close button (X). It contains two input fields: 'User' with the text 'administrator user ID' and 'Password' with the text '*****'. Below the fields are two buttons: 'OK' and 'Cancel'.

3. In the **User** field, type the administrator's user ID.
4. In the **Password** field, type the administrator's password.
5. Click **OK**.

Clicking OK opens the TRK Maintenance Tool dialog box.



The TRK Maintenance Tool - COWCO.TRK dialog box has a title bar. It contains two buttons: 'Scan' and 'Repair/Scan'. Below these buttons is a 'TRK Report' section with a text field containing 'C:\DATABASES\COWCO_2010-06-17_130539.csv' and a 'View Report...' button. Below the text field is the text 'Last scan on 6/17/2010 at 1:05pm (3 errors found)'. At the bottom right is a 'Done' button.

6. Click the **Scan** button to scan the .trk file.

When the scan is completed, the *Scan complete* message is displayed.

7. Click the **Done** button to close the message.

The file name and path for the report generated by the TRK Maintenance Tool during the initial scan is displayed in the TRK Report field. A date and time stamp for the last scan and the number of errors found during the scan is displayed below the TRK Report field.

8. Click the **View Report** button to open the TRK Maintenance Tool report in Microsoft Excel.

The TRK Maintenance Tool report is stored in the database directory with the following naming convention, [database name]_[scan date]_[scan time].csv.

9. Click the **Repair/Scan** button.

Clicking the Repair/Scan button opens the Save TRK Backup dialog box. You are required to create a backup of the .trk file before repairing the .trk file. The .trk backup file name is displayed in the File name field.

10. Navigate to where you want to store the .trk backup file and click **Save**.

Clicking Save saves the .trk backup file and starts the repair process.

When the repair process is completed, the *Scan complete* message is displayed.

11. Click the **Done** button to close the message.

The file name and path for the report generated by the TRK Maintenance Tool during the repair is displayed in the TRK Report field. A date and time stamp for the last scan and the number of errors found during the repair is displayed below the TRK Report field.

12. Click the **View Report** button to open the TRK Maintenance Tool report in Microsoft Excel.

Scheduling tag backups

It is recommended that you make regular backup files of your tags. An exported copy of a database does not retain tag history. Utilizing Windows Services, the Backup and Restore Tag Utility backs up a single database or directory of databases and provides tools to restore any damaged or lost files to an earlier point in time.

The Backup and Restore Utility searches the specified directory and when changes are made to a database's TRK file, the utility backs up the file at the scheduled backup interval, and saves it to the specified directory. Email notification can be set up to alert you when a TRK file is identified as damaged or the storage capacity of the backup file location. The backup files are located in the same location as the associated database.

Multiple backup services can be configured for different directories where Concordance databases are stored. A log file is created for each directory with the backup information, including when a backup was skipped because the previous backup took too long. The log file is stored in the Concordance 10 Logs folder in the Program data path.

Keep the following in mind when scheduling the TRK backup:

- Schedule the Backup and Restore Tag Utility to run when all databases are closed to ensure the process is not interrupted.
- The utility does not create a backup for the Notes.TRK or the Redlines.TRK.
- A backup will not be created if the directory path, including the TRK filename, exceeds 251 characters.

 Make sure that you have administrator-level permissions for the computer you want to run the Backup and Restore Tag Utility. For more information, see Windows Help and Support.

 When scheduling the backup of large TRK files that may require more than an hour to run, make sure you allow enough time between backups to ensure one process completes before the next one begins.

 To setup a tag backup schedule:

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.

2. **To setup a backup folder to store the files:**

1. Click the **Add** button.
2. In the **Configure Backup Directory** dialog box, click the **Browse** button.
3. In the **Browse for Folder** dialog box, locate and select the directory or folder that contains the database(s) you want to backup tags, and then click **OK**.

The path for the directory or folder is displayed in the Backup Root Directory field.

The path for the directory or folder should not exceed 251 characters in length.

4. From the **Frequency** list, select how often to run the backup utility.
5. In the **Start Time** box, specify the start time for the backup utility.
6. In the **Maximum # of backup files per DB** field, type the maximum number of backup files to store in the folder for the database.

When the backup folder reaches the maximum limit, the oldest backup file is replaced with the latest version.

7. When finished, click **Apply**.

3. **To setup the email notifications:**

1. In the **Notification** section, select any of the following:
 - Select the **Send Notification when TRK file stops responding** check box to receive an email for non-functioning TRK files.
 - Select the **Send backup summary email after each run** to receive an email outlining the latest backup processes.
2. Click the **Configure** button.
3. In the **SMTP Server** field, type the e-mail server to send e-mail notifications.
4. In the **SMTP Server Port** field, type the port number to use for outgoing mail transport.
5. In the **Username** field, type the name you want to appear as the author of the e-mail.
6. In the **Email Address** field, type the email address for the author.

7. In the **Recipient** field, type the email address for the individual who will receive the email notification.
8. To verify the email address is valid, click the **Test** button.

If the email is valid, a message is displayed stating the test was successful and the recipient will receive a test email .
9. When finished, click **Apply**.
4. When finished, click **Enable Tag Backups**.
5. In the **Backup Service Login** dialog box, do one of the following, and then click **OK**:
 - Select **Local System Account** to run the service from the local system account.
 - Select **This Account**, and then type the domain name and username in the **Username** field, and the password in the **Password** field.
7. When finished, click **OK** to exit the utility.

 To view the backup summary report:

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. Click the **Last Backup Summary** button.
3. Review the summary report, and then do one of the following:
 - Click **OK** to close the Backup Summary Report.
 - Click **Print** to print a copy of the report.
4. When finished, click **OK** to exit the utility.

 To change a tag backup schedule:

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. In the **Backup Folder** section, select the folder path you want to modify.
3. Click the **Modify** button.
4. In the **Configure Backup Folder** dialog box, make any necessary changes, and then click **Apply**.
5. To make changes to the email notification, click the **Configure** button, make any necessary changes, and then click **Apply**.
6. When finished, click **Enable Tag Backup**.
7. In the **Backup Service Login** dialog box, do one of the following, and then click **OK**:
 - Select **Local System Account** to run the service from the local system account.

- Select **This Account**, type the **Username** and **Password** in the corresponding fields.
8. When finished, click **OK** to exit the utility.

To delete a scheduled backup folder:

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. In the **Backup Folder** section, select the folder path you want to modify.
3. Click the **Delete** button.
4. When prompted, click **Yes** to confirm the deletion.
5. When finished, click **OK** to exit the utility.

Related Topics

Restoring tags from a backup

Additional tag backup methods

Scanning and repairing the TRK file

Additional tag backup methods

Restoring tags from a backup

The Backup and Restore Tag Utility can be used to set up a list of databases to be monitored for tag integrity. When a TRK file becomes damaged or is no longer functioning, the affected database is listed on the Restore tab with a list of backups allowing you to restore the TRK file to an earlier point in time.

To restore a damaged TRK file:

1. From the **Tools** menu, click **Backup and Restore Tag Utility**.
2. In the Backup and Restore Tag Utility dialog box, click the **Restore** tab.
3. In the **Damaged TRK file(s)** section, select the TRK file to restore.
4. From the **Restore Tags From** list, select the date and time to restore the TRK file.

5. Click the **Restore** button.
6. When finished, click **OK**.

Related Topics

Scheduling tag backups

Additional tag backup methods

Additional tag backup tools

The following tools are available for backing up tags:

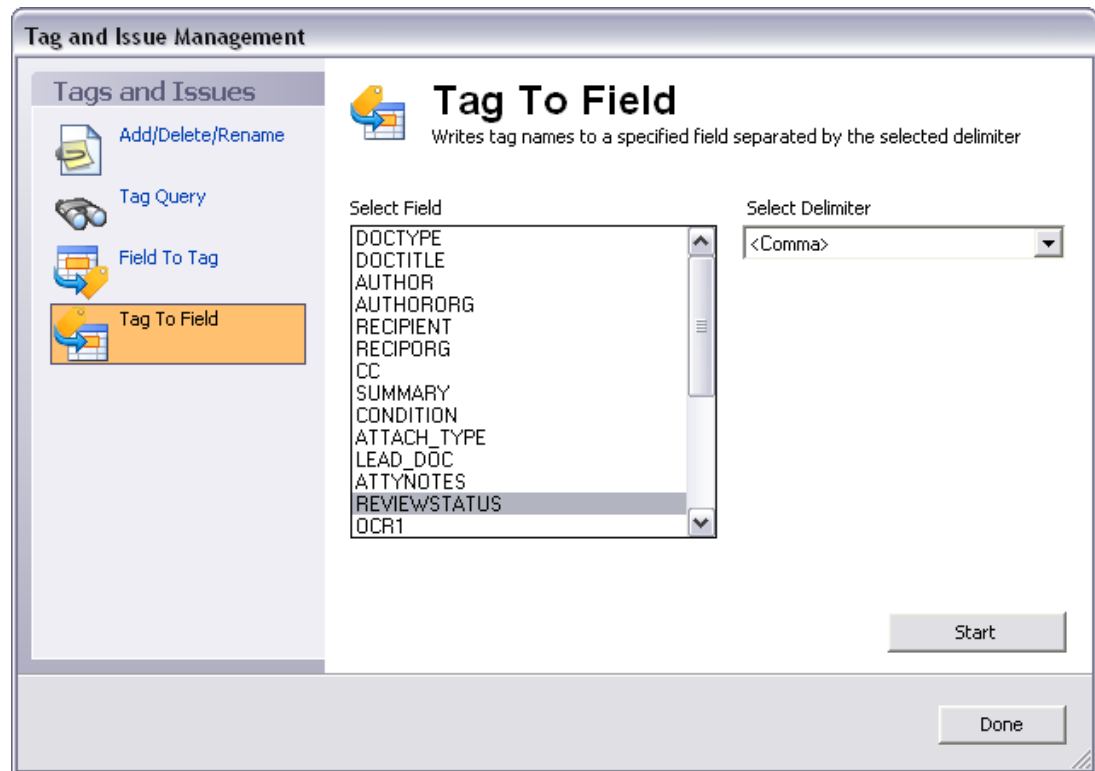
- Tag To Field command
- TagSaver CPL
- BulkTag Utility

Running the Tag To Field command

The Tag To Field command in the Tag and Issues Management dialog box writes the tag names to a specified field in the database separating the tag name with the selected delimiter. To restore tags stored in a field, see the Creating tags from data within a specified field procedure in Creating and applying tags.

To write tag names to a field:

1. On the **Tools** menu, click **Manage Tags/Issues**.



2. In the **Tag and Issue Management** dialog box, click the **Tag to Field** button.
3. From the **Select Field** list, select the field you want to copy the tag names.
4. From the **Select Delimiter** list, select the delimiter to separate the tag names in the field.
5. Click the **Start** button.
6. When prompted, do one of the following:
 - Click **Yes** to confirm that you want to write the tag names in the selected field.
 - Click **No** to append the tag names to the existing field contents.
 - Click **Cancel** to abandon the changes.
7. When finished, click **Done**, and verify that the selected field displays the tag names separated by the selected delimiter.

Running the TagSaver CPL

You can create a backup file of your tags or restore the backed up tags into another database using the TagSaver_[version #].cpl. We recommend running this CPL script once or twice daily, depending on how much active reviewing is occurring. The tag back-up is stored in a database's .GAT file and the tag data is retrievable, when needed.

TagSaver CPL benefits:

- You can move tag application information to different databases
- You can restore backup files (.gat) to other databases to move tag structure

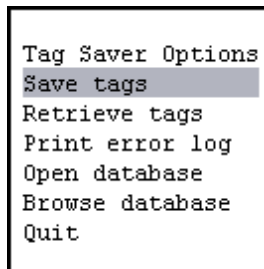
- ✎ When restoring tags from a .gat file, the maximum number of characters allowed in a tag name is 199.

 To back up tags in a database:

1. In Concordance, click the **All** button on the **Standard** toolbar to query all records in your database.
2. On the **File** menu, click **Begin program**.
3. Navigate to the CPL directory installed with Concordance, and click the **TagSaver_v[version #].cpl** file.

The default directory for the CPL folder installed with Concordance is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\CPL (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\CPL (Windows 7)*. For more information about CPLs, see and the TAGSAVER_v#.cpl.

4. Click **Open** to open the **Tag Saver Options** list.



5. Click **Save tags** or press Enter.

Clicking Save tags or pressing Enter opens the field list. Use the arrow keys on your keyboard to scroll through the field list.

6. Click or press Enter on the field you want to associate with the tags.

You need a common field with a unique value, such as the Begno (Bates number) field. Do not use the Access ID field when exporting tag history.

	Field	Type
Begno	Text	
Endno	Text	
Docdate	Date	
Doctype	Full Text	
Doctitle	Full Text	
Author	Full Text	
Authororg	Full Text	
Recipient	Full Text	
Reciporg	Full Text	
Cc	Full Text	
Summary	Full Text	
Condition	Full Text	

After you select the field, the CPL creates the [database name].GAT file in the same directory as the database's .dcb file. The [database name].gat file contains your tag backup.

After the CPL process is finished, the Tag Saver Options list is displayed.

7. Click **Quit** to return to Concordance.

The database's .gat file is not automatically updated when you add or modify tags in the database. It is best practice to run the TagSaver_v[version #].cpl periodically to ensure your tag backup is current.

To restore tags from a .GAT file to a database:

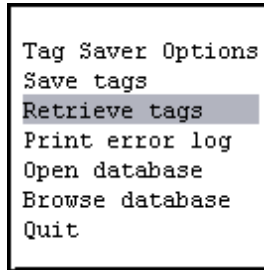
1. Copy the .GAT file containing the tags you want to add to your database, and paste the file into the database directory for the database you want to add the tags.
2. Rename the .GAT file you copied to the database directory using the same name as the database's .dcb file.

For example if the database's .dcb file is Cowco.dcb, the .gat file needs to be named Cowco.gat.

3. In Concordance, open the database you want to add the tags.
4. On the **Standard** toolbar, click the **All** button to query all records in your database.
5. On the **File** menu, click **Begin program**.
6. Navigate to the CPL directory installed with Concordance, and click the **TagSaver_v[version #].cpl** file.

The default directory for the CPL folder installed with Concordance is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\CPL (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\CPL (Windows 7)*. For more information about CPLs, see About CPL Scripts and the TAGSAVER_v10.00.

7. Click **Open** to open the **Tag Saver Options** list.



8. Click **Retrieve tags**.

When you click Retrieve tags, the CPL adds the tags for all the records that were tagged in the .gat file to the database.

After the CPL process is finished, the Tag Saver Options list is displayed.

9. Click **Quit** to return to Concordance.

10. Open the **Tags** task pane to verify the tags were added and applied correctly to the database.

To run the BulkBackupTag Utility:

The BulkBackupTag utility performs a bulk back up of the contents of a database's .TRK file within a single directory, including all sub-directories when specified, to the associated database .GAT files.

The following BulkBackTag utility modes are available:

- [-v] : Verifies that the specified database has an Image Key field set and identifies any databases that may be corrupt. This is recommended prior to writing to the .GAT file.
- [-b] : Backs up .TRK file to a .GAT file.
- [-r] : Includes any sub directories recursively within the specified path

```

C:\WINDOWS\system32\cmd.exe
C:\Admin\Desktop\Utility>BulkBackupTagUtil.exe
Usage: BulkBackupTagUtil.exe [Model] [DB FolderPath]
-----
[Model]: [-v] or [-b] or [-r]
-v      :Runs in validation mode to check whether the database contains
         any image key field
-b      :Takes the tag backup to a .GAT file
-r      :For subfolder enumeration

[DB FolderPath]:
         Path of the database folder without "\" termination.Path should
         be enclosed within double quotes["DB FolderPath"] if the path
         contains space

C:\Admin\Desktop\Utility>

```

 The BulkBackUpTag utility is only compatible with Concordance version 10.x databases and cannot be run on .FYI files or concatenated databases.

1. On the Start menu, click **Run** to open the Run dialog box.
2. In the **Open** field, type **cmd** and then click **OK** to open the **cmd.exe** command prompt.
3. Navigate to the folder containing the **BulkBackUpTagUtil.exe** file.

The BulkBackUpTagUtil.exe file must be downloaded onto your computer before you can run the utility. Contact Concordance Technical Support at 1-866-495-2397 or concordancesupport@lexisnexis.com to download the file.

4. At the command prompt type **BulkBackUpTagUtil.exe [Mode] "[database path and name]"**.
5. When the BackUpTag utility is finished, the results are displayed for each database within the specified path.

Log file(s) are generated for both Validation & Backup modes. A separate log file is generated and saved to the same directory where the BackUpTagUtil.exe file is located. Each log file name contains the date and timestamp to identify when the log was created.

Setting Up and Managing Security

About Concordance security

Concordance features a two-key system for accessing the security console's Security dialog box. Depending on the role of each reviewer, users may need different levels of access to each part of the system. Some staff may even warrant having administrator-level access while others only need minimal access to Concordance to review records. Security access to the database requires some forethought and preliminary planning based on user roles, which should be outlined before you administer rights to the system.

Enabling security is optional. Once security is enabled, you also have the option to require a logon. Concordance can restrict security for fields and menu items. For increased security, you should require a database logon.

Based on the security profile setup, you can prevent most reviewers from seeing any administrator-level menu options or features. These items do not display at all or are unavailable for selection. Users can be assigned full read/write access, read-only access, write-only access, and no access on a field-by-field basis. Users without read access are unable to view or search on restricted fields. Their searches are post-processed to remove any references to these fields, so their searches may run slightly slower and hit counts may not provide the same results as users with full privileges.

Enabling security requires temporary exclusive control of the database. Only one administrator user ID and password is allowed per database. The administrator user ID and password is set when the Security dialog box is first accessed. This information should be shared with a supervisor or one other administrator, with a copy of all security settings stored on your

network in a secure location.

User IDs and Passwords:

- User IDs – 24-character maximum, not case sensitive, spaces allowed
- Passwords – 24-character maximum, case sensitive, created on first access, slash characters are not allowed in passwords
- Blank user names are not allowed in Concordance

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

Security Overview:

- Administrator and user passwords are encrypted with the SHA-1 standard in the .dcb and .sec files.
- Best practice is to create an account for the Concordance administrator with full rights to everything upon first setup at the Supervisor permissions level.
- If you enable security and do not require logons, Concordance captures a user's network login and compares it to the user list in the database's Security dialog box. If a match is found, then the user receives corresponding rights. If a match is not found, the user receives the default user rights.
- Security is distinct to each database; you must create and modify user permissions for each database. You can import a .csv file from another database to speed up the process.
- New users select their passwords when first logging on to Concordance.

Logons and Passwords

Passwords for each user are set when the user first logs on to Concordance. The first word entered as a password is then confirmed in a security dialog box. Users can change their passwords at any time.

For more information about changing passwords, see Accessing Concordance.

-  Concordance only allows one administrator user ID and password per database. The database's administrator ID and password should be shared with a supervisor or one other administrator, with a copy of all security settings stored on your network in a secure location. Once the administrator user ID and password is created it is encrypted and is not visible or accessible anywhere in Concordance.

Understanding the Default User

When first accessing the Security dialog box, you will see that a default user already exists. If you enable security, but don't check the Login required check box, Concordance first checks to see if there is a Windows or network ID matching the user name in the security console. If a match is found, then you'll be logged into that database with those security settings applied. If there is not a match, you will receive the security settings that were

applied to the default user.

For a minimal level of database security, you can create users that match the Windows or network IDs for all administrators and give them full rights. Then, apply a lower level of security to the default user and apply that security setting to everyone else. Another option is to delete the default user completely.

Setting up security

We recommend that you set up security for all users and enable logons. To help make this task easier, we suggest you create user templates based on review team roles like attorney and paralegal. This allows you to quickly apply security for new users because role templates already contain pre-defined settings. Once a user is added to the Security dialog box based off a role template, you can further customize any access rights for each user.

-  If you are setting up security and adding users to a new database, and want to import the security settings, including users, from another database, be sure to import the security settings before manually defining any security settings or users in the database.

When you import a security settings .csv file, the file overwrites all existing security settings defined in the Security dialog box.

There are three files that hold security information:

- The .trk file stores all users' field and menu access rights
 - The .sec file stores all user IDs and passwords
 - The .dcb file stores the security console administrator's user ID and password
-  If you create new users from a role template, the settings are only duplicated from one tab in the Security dialog box. We recommend duplicating settings from the Field rights tab, and then selecting the user's menu rights.
-  Whenever you add or rename a field in the database, it is added to the database without field access rights. In the Security dialog box, the No rights check box is automatically selected for the field. You will need to set the field privileges for the new or renamed field for users already entered in the Security dialog box.
-  When you make changes to security settings in Concordance, some security setting changes will not be applied until the database is closed and reopened.

Before you can manage the Concordance database, you must set up the Concordance administrator user ID and password. Concordance requires the administrator user ID and password to access some of the administration menu commands.

-  When adding users, the username cannot be greater than 24 characters in length.

Administrator-only menu commands:

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

- **Security**
- **Pack > Database**
- **Pack > Dictionary**
- **Zap**
- **Convert Single Database**
- **Bulk Convert Databases to Current Version**
- **Remove Kashida Characters**

Optional Field and Menu Restrictions

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

Restricting Field Access

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

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

Hiding Menu Items

If security is not applied to a database, you can restrict menu items from users for all Concordance databases by listing them in the Concordance_[version #].ini file. Any menu items listed in a corresponding .ini file are hidden from specified users.

Example: Entries in the .ini file are formatted as follows:

```
[DeletedMenuItems]
```

```
smithja=zap,modify
```

This example prevents user John Smith from being able to see or access the Zap and Modify menu items in any database that he accesses through the Concordance executable sharing the same folder as the .ini file. Concordance recognizes the user's Windows or network user ID to apply the restriction of menu items.

This feature is only available when Concordance security is not enabled on the Field rights tab in the Security dialog box, and it does not allow you to hide custom menu items.

Users can potentially find the .ini file on your organization's network and then modify it. We recommend hiding menu items in the security console as the highest level of security.

Security Guidelines for Concatenated Databases

Setting up security for concatenated databases includes the following guidelines:

- Security settings need to be set up in each database. Setting security in a concatenated database set only affects the primary database.
- The user name and password must be the same for all databases in the concatenated set when security is enabled.
- When the user name and password in the primary database does not exist in a secondary database, and security is enabled, the concatenated database will not open. The user will receive a message that they do not have access rights to the specific database.
- When a secondary database has security enabled and the primary database does not have security enabled, the user is prompted for the user name and password when using the secondary database. The user name and password entered becomes the user name and password for the concatenated database set.

To setup the Concordance administrator account:

1. Open the database in Concordance.
2. On the **File** menu, point to **Administration**, and click **Security**.

The first time you click Security in the database, the Administration dialog box opens. The User field defaults to the your Windows user ID.



-  The first time you attempt to login to the security console, you may notice a slight delay due to improvements to Concordance security encryption and logging features.

3. In the **User** field, type the administrator user ID.
Blank user names are not allowed in Concordance.
4. In the **Password** field, type the administrator password.

-  If you do not want to set the password to open the Security dialog box, leave the password empty and click OK. However, this allows anyone else to enter their own user name (or yours) and a password, locking you out of the administration functions or the database.

- Click **OK**.

Clicking OK opens the Confirm New User/Password dialog box.



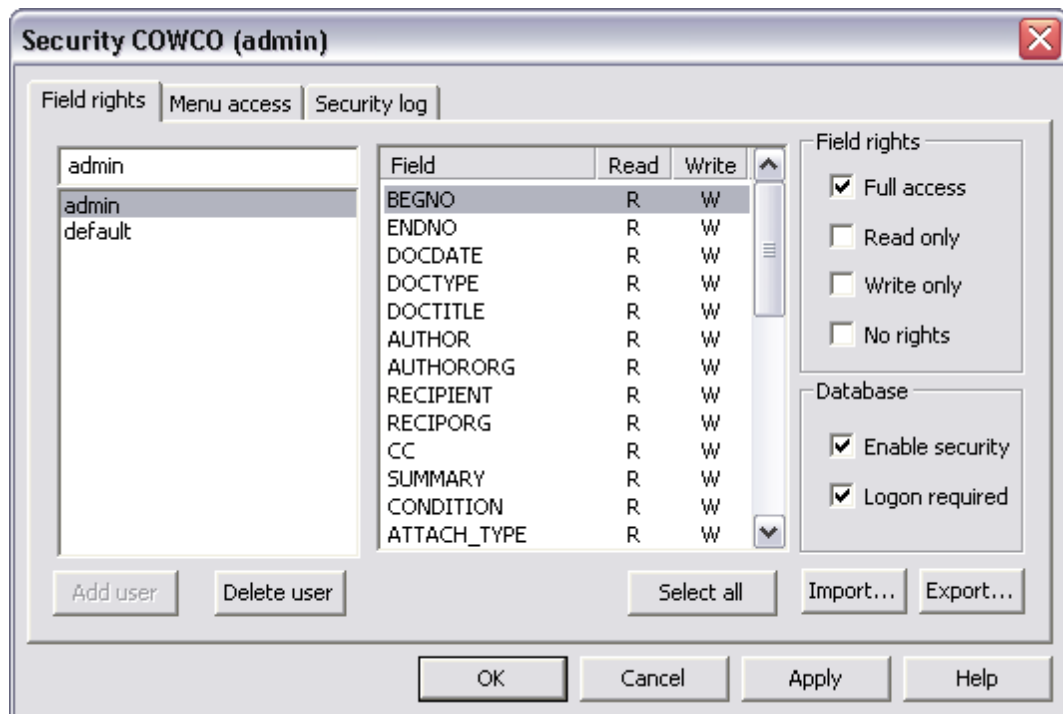
The dialog box titled "Confirm New User/Password" has a close button (X) in the top right corner. It contains two text input fields: "User" with the text "administrator user ID" and "Password" with the text "*****". At the bottom are two buttons: "OK" and "Cancel".

- In the **User** field, type the administrator user ID again.
- In the **Password** field, type the administrator password again.

 Concordance only allows one administrator user ID and password per database. The database's administrator ID and password should be shared with a supervisor or one other administrator, with a copy of all security settings stored on your network in a secure location. Once the administrator user ID and password is created it is encrypted and is not visible or accessible anywhere in Concordance.

- Click **OK** to open the **Security** dialog box.

You will see the administrator user ID and the default user ID in the user list on the Field rights tab.



The dialog box titled "Security COWCO (admin)" has a close button (X) in the top right corner. It has three tabs: "Field rights", "Menu access", and "Security log". The "Field rights" tab is selected. On the left is a list of users: "admin", "admin", and "default". In the center is a table with columns "Field", "Read", and "Write". On the right is a "Field rights" section with checkboxes for "Full access", "Read only", "Write only", and "No rights". Below that is a "Database" section with checkboxes for "Enable security" and "Logon required". At the bottom are buttons: "Add user", "Delete user", "Select all", "Import...", "Export...", "OK", "Cancel", "Apply", and "Help".

Field	Read	Write
BEGNO	R	W
ENDNO	R	W
DOCDATE	R	W
DOCTYPE	R	W
DOCTITLE	R	W
AUTHOR	R	W
AUTHORORG	R	W
RECIPIENT	R	W
RECIPORG	R	W
CC	R	W
SUMMARY	R	W
CONDITION	R	W
ATTACH_TYPE	R	W

By default, new users, including the administrator user ID, will have no rights on the Field rights tab and full menu access rights on the Menu access tab.

9. On the **Field rights** tab, make sure that the administrator user ID is selected in the user list.
10. Click the **Select all** button to select all the database fields, and select the **Full access** check box.

Clicking the Select all button and selecting the Full access check box gives the Concordance administrator full read/write access to all fields.

Enabling security is optional, but it is best practice to enable security for Concordance databases.

11. To enable security for all users, select the **Enable security** check box.

Once the Enable security check box is selected, Concordance enforces the field privileges for the users in the users list on the Field rights tab. This generally works on networks without requiring manual user IDs and passwords for each database.

12. To require all users to log on to Concordance each time they access Concordance, select the **Logon required** check box.

 Selecting Logon required affects database access in FYI Reviewer. If selected, the user needs to log on with a non-blank password to access this database in FYI Reviewer. Be sure to inform FYI Reviewer users when setting the database security to Logon required.

Enabling security requires momentary exclusive control of the database. Concordance attempts to gain exclusive control of the database when you save the Enable security and/or Logon required setting. An error message is displayed if users are logged on to Concordance and Concordance could not make the change. The check boxes will remain selected after you click OK or the Apply button if the change was successful.

If you do not want to enable security for the database, leave the Enable security and Logon required check boxes empty.

13. With the administrator user ID still selected in the user list, click the **Menu access** tab.
14. Click the **Supervisor** button to ensure the administrator user ID has full rights to everything in Concordance.
15. Click the **Apply** button to save the administrator user and its security settings.

To modify a user, including the default user:

When first accessing the Security dialog box, you will see that a default user already exists. If you enable security, but don't check the Login required check box, Concordance first checks to see if there is a Windows or network ID matching the user name in the security console. If a match is found, then you'll be logged into that database with those security settings applied. If there is not a match, you will receive the security settings that were applied to the default user.

For minimal level of database security, you can create users that match the Windows or network IDs for all administrators and give them full rights. Then, apply a lower level of security to the default user and apply that security setting to everyone else. Another option is to delete the default user completely.

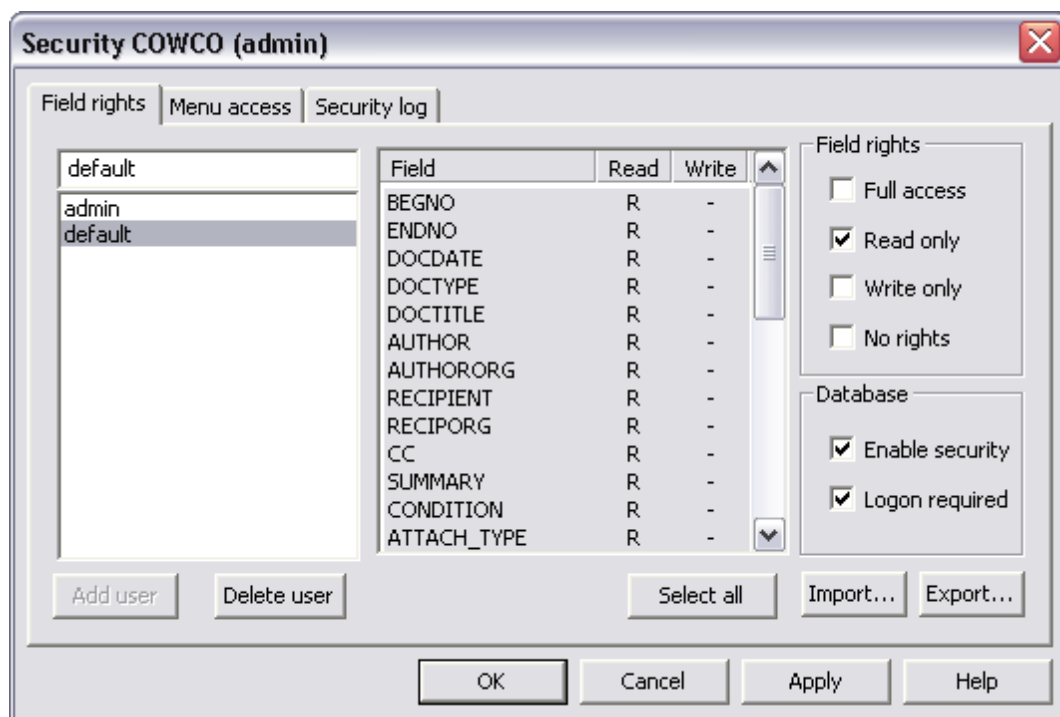
1. On the **File** menu, point to **Administration**, and click **Security**.

Clicking Security opens the Administration dialog box.

2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Security** dialog box.
5. On the **Field rights** tab, click user name in the user list.

If you are modifying the default user, click default in the user list.

By default, the No rights check box is selected for all fields.



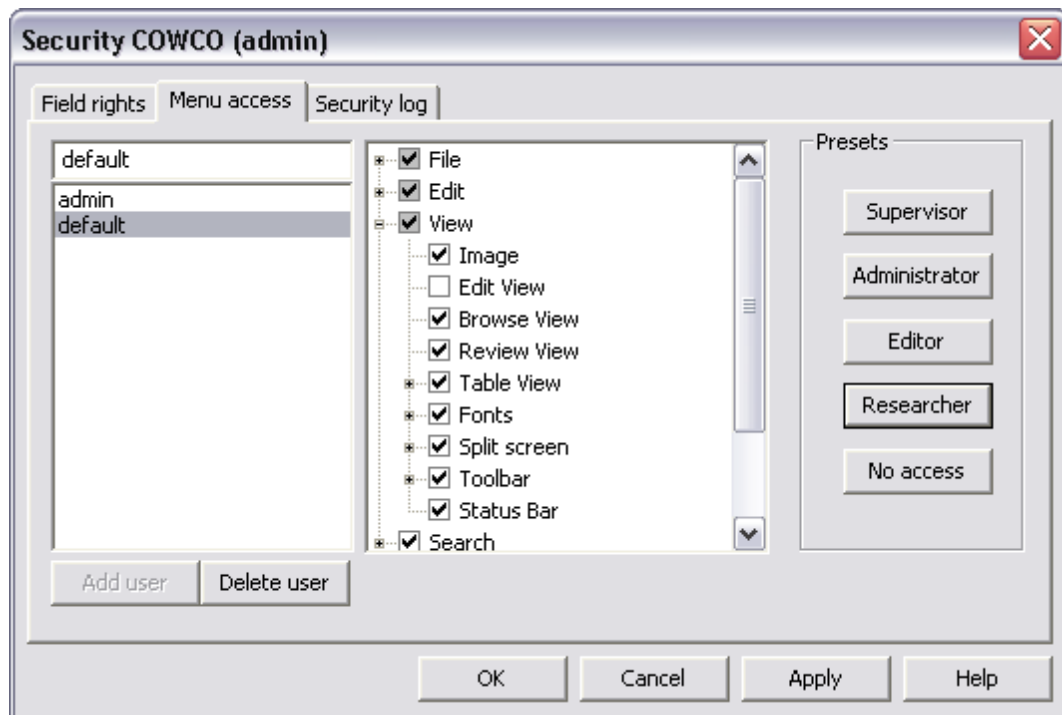
6. In the **Field** list, select the fields you want to apply field rights.
To select multiple fields, use CTRL+click or SHIFT+click.
7. In the **Field rights** section, select one of the following:
 - **Full access** - gives users read/write access to a field. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance does not either.
 - **Read only** - gives users the ability to search, browse, and print the field. They may not

edit or otherwise modify read-only fields. Commands such as Global edit and Load will not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

- **Write only** - gives users limited access. Users with write-only field access can load data into these fields using Load, and assign values to them through the programming language, but they will not be able to view or search these fields. The Edit view will not display write-only fields and therefore they cannot be edited. The searches will be post-processed to remove any references to hits in these fields. The searches may also run slower.
- **No rights** - denies all access to the field. Users will not be able search for data in these fields. Searches will be post-processed to remove any references to hits in these fields. The searches may run slower and the results may not contain the same count as a search with read-only field access.

 Field privileges do not take effect until the database is closed and reopened.

8. Click the **Menu access** tab.



By default, new users have full access to all menus and menu commands on the Menu access tab. You can manually select the menu access permissions for each menu, select one of the menu access presets, or select a preset and then manually customize the menu permissions for the individual user.

Menu access presets:

- **Supervisor** - access to all menus and menu commands.
- **Administrator** - access to all menus and menu commands except the Modify, Security, and Zap menu commands.
- **Editor** - no access to the menu commands restricted in the Administrator preset

and does not have access to the following menu commands: New, Reindex, Index, Pack, Begin program, Edit program, or the menu commands for data validation . Editors can, of course, search and edit, global edit, load and unload data, and run reports.

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

After selecting one of the menu preset buttons, you can explore the menu tree on the Menu access tab to view the default menu settings provided by Concordance for the selected preset. You can further customize the menu settings for each user depending on the user's role and skill level, as needed.

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

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

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

9. In the **Presets** section, click one of the menu access preset buttons, and/or manually define the menu and menu command access for the user in the menu tree.
10. Click the **Apply** button to save your changes to the user settings.

To create role templates:

Role templates allow you to use pre-defined field rights or menu access settings when you create a new user to help speed up the user creation process. For example, you can create a role template for your most commonly used roles, such as attorney, paralegal, and reviewer, and use the templates each time you create a user ID for one of your attorneys, paralegals, or reviewers.

The steps for creating a role template are the same as the steps for creating a new user. The only difference is that you will be using this role template user to create individual users in Concordance.

1. In the **Security** dialog box, click the **Field rights** tab.
2. In the field above the user list, select all the text of the user name currently selected in the user list, and type the role template name.
3. Click the **Add user** button.
4. On the **Field rights** tab, define the field rights for the role template.
5. Click the **Menu assess** tab and define the menu access rights for the role template.

See To create a user, to view the steps for defining field and menu access rights.

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

To create a user:

1. On the **File** menu, point to **Administration**, and click **Security**.

Clicking Security opens the Administration dialog box.

2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.

When you are creating a user from an existing role template, you can only use the field rights settings or menu access settings from the role template to create a new user. You cannot use both the field rights and menu access settings from a role template to create a new user. We recommend duplicating settings from the Field rights tab, and then selecting the user's menu rights on the Menu access tab.

5. To use the field rights settings from a role template, on the **Fields rights** tab, in the field above the user list, select all the text of the user name currently selected in the user list, and type the new user name.

To use the menu access settings from a role template, click the Menu access tab, in the field above the user list, select all the text of the user name currently selected in the user list, and type the new user name.

-  The FYI Server and FYI Reviewer do not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, FYI Server and FYI Reviewer only support user names, passwords, or database names containing single-byte characters, such as English characters.

If your organization uses FYI Server and FYI Reviewer, be sure to only use single-byte characters when creating user names, passwords, and database names in Concordance.

6. Click the **Add user** button.
7. To modify the field rights settings, click the **Field rights** tab.

By default, the No rights check box is selected for all fields, unless you created the new user from a role template on the Field rights tab, in which case, the new user will have the same field rights as the role template.

8. In the **Field** list, select the fields you want to apply or remove field rights.

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

9. In the **Field rights** section, select one of the following:

- **Full access:** gives users both read/write access to a field. This level of access for all fields is required for anyone who will be performing maintenance functions such as indexing, packing, or a database modify. If the user does not have full access to the fields, Concordance does not either.
- **Read only:** gives users the ability to search, browse, and print the field. They may not edit or otherwise modify read-only fields. Commands such as Global edit and Load will

not display fields which have read-only access. These fields are displayed in Edit view, but only for reference or to copy text to the clipboard.

-  The read-only setting for fields in the Data Entry Attributes dialog box takes precedence over the read-only setting for fields on the Field rights tab in the Security dialog box.

For example, if the Read only check box is selected for the OCR1 field in the Data Entry Attributes dialog box, and the Full access check box is selected for the OCR1 field on the Field rights tab in the Security dialog box, the OCR1 field will be read-only for the user in the Edit view.

For more information about the Data Entry Attributes dialog box, see [Setting data validation](#)

- **Write only:** gives very limited access. Users with write-only field access can load data into these fields using Load, and assign values to them through the programming language, but they will not be able to view or search these fields. The Edit view will not display write-only fields and therefore they cannot be edited. The searches will be post-processed to remove any references to hits in these fields. The searches may also run slower.
- **No rights:** denies all access to the field. Users will not be able search for data in these fields. Searches will be post-processed to remove any references to hits in these fields. The searches may run slower and the results may not contain the same count as a search with read-only field access.

10. Click the **Menu access** tab.

By default, new users have full access to all menus and menu commands on the **Menu access** tab, unless you created the new user from a role template on the **Menu access** tab in which case, the new user will have the same menu access settings as the role template.

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

 Menu access presets:

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

After selecting one of the menu preset buttons, you can explore the menu tree on the Menu access tab to view the default menu settings provided by Concordance for the selected preset. You can further customize the menu settings for each user

depending on the user's role and skill level, as needed.

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

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

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

11. In the **Presets** section, click one of the menu access preset buttons, and/or manually define the menu and menu command access for the user in the menu tree.
12. Click the **Apply** button to save your new user settings.

 Field rights and menu access settings do not take effect until the database is closed and reopened.

To delete a user:

1. On the **File** menu, point to **Administration**, and click **Security**.
Clicking Security opens the Administration dialog box.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.
5. Click the user name in the user list and click the **Delete user** button.
6. Click **OK** to close the **Security** dialog box.

To export security settings:

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

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

1. On the **File** menu, point to **Administration**, and click **Security**.
Clicking Security opens the Administration dialog box.

2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.
5. Click the **Export** button.

Clicking the Export button opens the Save As dialog box.

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

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

Here is an example of exported security settings file in a spreadsheet:

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

7. Click **OK** to close the **Security** dialog box.

To import security settings:

You can import the security settings from one Concordance database into another Concordance database. When you import Concordance security settings, you are importing all of the security settings, including users, that were defined for the database in the Security dialog box.

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

 If you are setting up security and adding users to a new database, and want to import the security settings, including users, from another database, be sure to import the security settings before manually defining any security settings or users in the database.

When you import a security settings CSV file, the file overwrites all existing security settings defined in the Security dialog box.

1. On the **File** menu, point to **Administration**, and click **Security**.

Clicking Security opens the Administration dialog box.

2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.
5. Click the **Import** button.

Clicking the Import button opens the Open dialog box.

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

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

7. Click **OK** to close the **Security** dialog box.

About managing security

When you set up security, Concordance automatically saves passwords and security settings to a .sec file. You should also export a copy of your Security dialog box security settings to a .csv file and store the file in a secure location on your server to reference in an emergency. Share this file with your supervisor or one other administrator.

Managing security involves the following:

- Modifying security settings
- Resetting lost passwords
- Exporting security files for reference files or to import in another database
- Overriding security settings for locked databases or lost administrator accounts
- Monitoring changes to the security settings

Modifying security settings

Once a database's security and users are set up, you may need to modify the security settings, add additional users, or delete existing users.

-  When you make changes to security settings in Concordance, some security setting changes will not be applied until the database is closed and reopened.

 To reset lost passwords:

To reset security accounts, you must know the Concordance user ID and password. Otherwise your options are limited based on your needs and access.

If a user has forgotten a password, simply delete the account and make a new one. This is another good reason to set up user role templates in the Security dialog box for faster user set up. The user creates a new password upon first log on.

 To modify a user

You can modify a user's security settings, add additional users, or delete existing users in the Security dialog box. For more information, see *Setting up security*.

 To reset all users:

If you need to reset all user passwords or have forgotten your user ID but still have the security console administrator's user ID and password, you can do so by deleting or renaming the .sec file. This file is located in the same directory as your database and stores all user IDs and passwords.

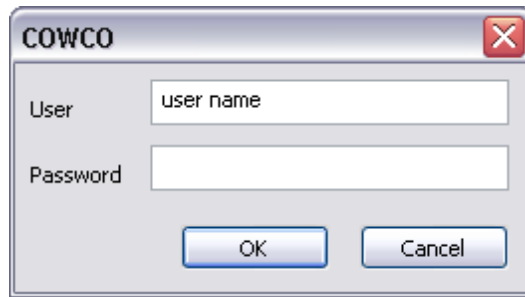
By deleting or renaming the file, you are able to open the database with the security console administrator's user ID and password. Once you login, you won't see any data because security is still enabled, but you can access Security to reset all users to the database by importing a backup copy of your security settings.

You must know the database's administrator user ID and password for this process.

1. Navigate to the directory containing the database .sec file containing the database users you want to reset.

A database's .sec file is stored in the same directory as the database .dcb file. The default directory is *C:\Documents and Settings\All Users\Application Data\LexisNexis\Concordance 10\Database (Windows XP)* or *C:\ProgramData\LexisNexis\Concordance 10\Database (Windows 7)*.

2. Rename or delete the .sec file.
3. In Concordance, open the database that needs security updated.
4. The logon dialog box opens the first time you log on.



5. Click **Cancel**.

Clicking Cancel opens the Administration logon dialog box.

6. In the **User** field, type the administrator's user ID.
7. In the **Password** field, type the administrator's password.
8. Click **OK**.

After clicking OK, the database opens, but no data is visible.

9. On the **File** menu, point to **Administration**, and click **Security**.
10. Click the **Import** button.

Clicking the Import button opens the Open dialog box.

11. Browse to and click the .csv file containing the users and security settings you want to import and click the **Open** button.

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

For more information about importing users and security settings, see Setting up security.

12. Click **OK** to close the **Security** dialog box.

To enable or disable security:

Enabling security is optional, but it is best practice to enable security for Concordance databases. Security is enabled on the Field rights tab in the Security dialog box.

1. On the **File** menu, point to **Administration**, and click **Security**.
Clicking Security opens the Administration dialog box opens.
2. In the **User** field, type the administrator user ID.
3. In the **Password** field, type the administrator password.
4. Click **OK** to open the **Field rights** tab in the **Security** dialog box.

5. To enable security for all users, select the **Enable security** check box.

Once the Enable security check box is selected, Concordance enforces the field privileges for the users in the users list on the Field rights tab. This generally works on networks without requiring manual user IDs and passwords for each database.

To disable security, clear the Enable security check box.

6. To require all users to log on to Concordance each time they access Concordance, select the **Logon required** check box.

 Selecting Logon required affects database access in FYI Reviewer. If selected, the user needs to log on with a non-blank password to access this database in FYI Reviewer. Be sure to inform FYI Reviewer users when setting the database security to Logon required.

To not require users to log on before accessing Concordance, clear the Logon required check box.

Enabling security requires momentary exclusive control of the database. Concordance attempts to gain exclusive control of the database when you save the Enable security and/or Logon required setting. An error message is displayed if users are logged on to Concordance and Concordance could not make the change. The check boxes remain selected after you click OK or the Apply button if the change was successful.

If you do not want to enable security for the database, leave the Enable security and Logon required check boxes empty.

7. Click the **Apply** button to save your changes.

Accessing locked databases

If your organization finds itself unable to access a database, you have two options available:

Export the database

When exporting a Concordance database, security is not included in the export. If you have a user who has access to the Export menu, the user can export the database, create a new security administrator ID and password, and then apply security for all users. When exporting a database, the user is only able to export the fields that the user has access to under the existing security settings. You can also import the backup copy of the original database's security settings into the exported database.

For more information about exporting databases, see [Exporting databases](#).

For more information about importing and exporting security settings, see [Setting up security](#).

Contact Concordance Technical Support

Concordance Technical Support analysts can reset your security console and restore all user IDs and passwords. But this is not cheap or quickly done, and has the following requirements:

- You must first supply a technical support analyst with a notarized affidavit from the owner of the database verifying your security files. This is most often from your corporate entity and requires a legal document on corporate letterhead with the appropriate stakeholders signature.
- A fee will be assessed before a technical support representative has permission to overwrite your security.

If you do not know this information ahead of time, there will be a delay in getting approval for the support override. Please ensure that you always have a current backup copy of your security profiles and settings, and that a supervisor or secondary administrator has access to this information in case of an emergency.

Exporting security logs

Security logging generates an audit trail of all changes to the security settings of a Concordance database. The log includes changes to user logins and permissions, importing or exporting security settings, and the start and end of security sessions.

Security logging is database-centered. Each Concordance database has its own security log, so only the actions affecting the security for the specific database are recorded in the database's security log.

Security logging occurs for a database when:

- An administrator in Concordance opens the Security dialog box and makes changes to the security settings in the dialog box.
- An administrator in the Concordance FYI Admin Console opens the Management tab and adds or deletes a user from a database, or changes the password for a user belonging to a database.

You can view a database's security log by exporting the log and viewing the log file in Microsoft Excel. Exporting a Concordance database's security log generates the [database name] _SecurityLog_Dump.csv file. The .csv file's text format is in the Unicode Standard. Fields are tab-delimited. Exporting a security log copies the information to a file, but does not delete the information from the log.

 If you are using Concordance versions 10.02 or 10.03, you cannot export the security log. Also, security logging is not available for databases created with 10.02 or 10.03 and opened with Concordance version 10.05 or later.

Enabling and Disabling Security Logging

Security logging is enabled by default for new databases. If you have an existing

Concordance 10 database you want to generate security logs, you need to enable security logging for the database. The DumpSLog.exe utility can enable or disable security logging for a database using the /enable or /disable parameter. When you disable security logging for a database, the utility deletes all existing security log information for the database.

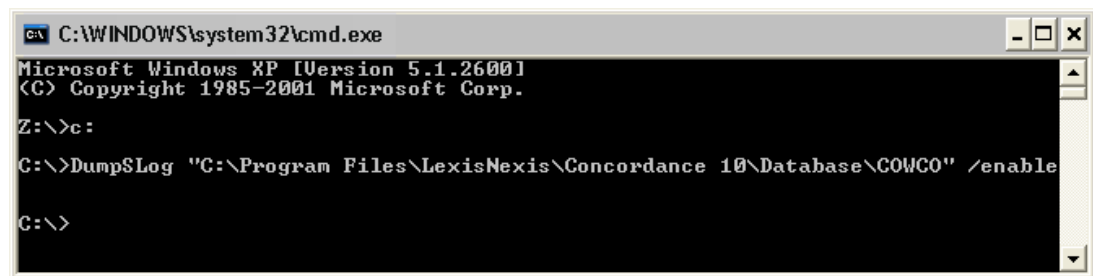
The DumpSLog.exe file must be downloaded onto your computer before you can export security logs or enable or disable security logging using the DumpSLog utility.

Contact Concordance Technical Support at 1-866-495-2397 or concordancesupport@lexisnexis.com to download the file.

 To enable security logging for a database:

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /enable** and then press Enter.

Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /enable

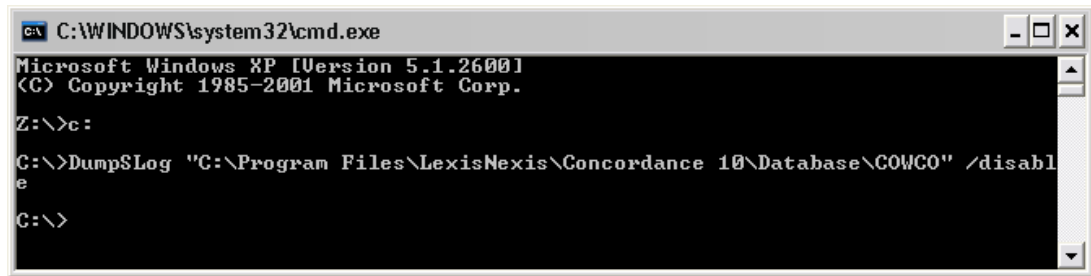


```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
Copyright 1985-2001 Microsoft Corp.
Z:\>c:
C:\>DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /enable
C:\>
```

 To disable security logging for a database:

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /disable** and then press Enter.

Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /disable



```

C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

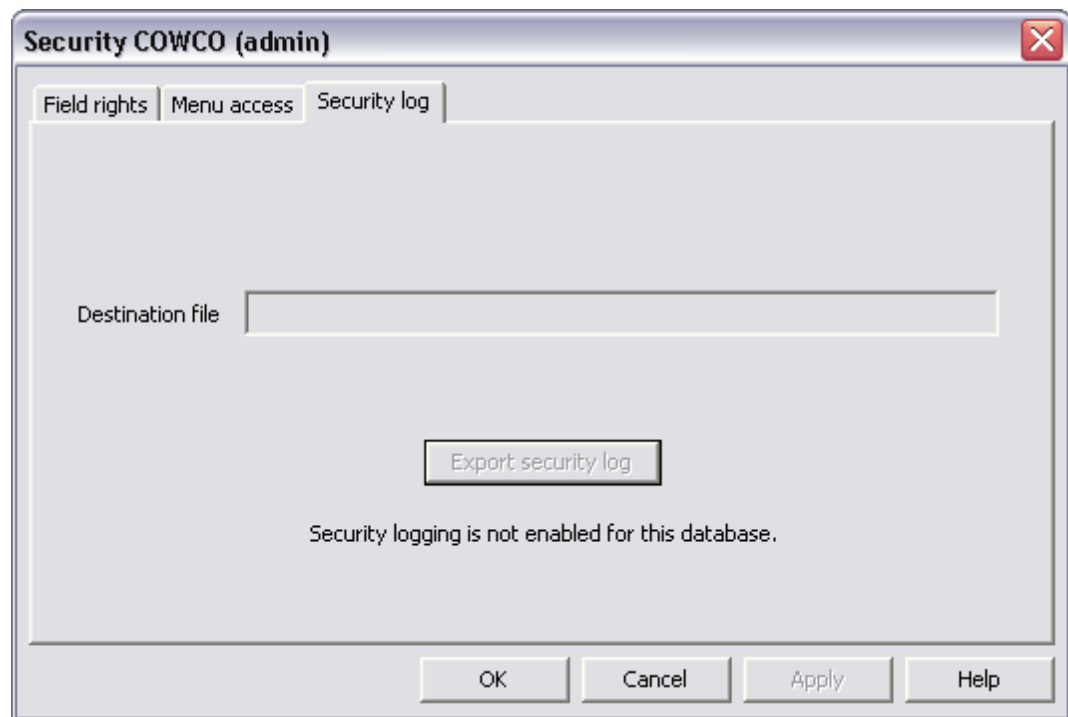
Z:\>c:

C:\>DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /disabl
e

C:\>

```

When security logging is disabled in a database, on the Security log tab in the Security dialog box in Concordance, the Export security log button is disabled and the following message is displayed at the bottom of the Security log tab: *Security logging is not enabled for this database.*



Exporting Security Logs

There are two ways to export the security log. You can export the file from:

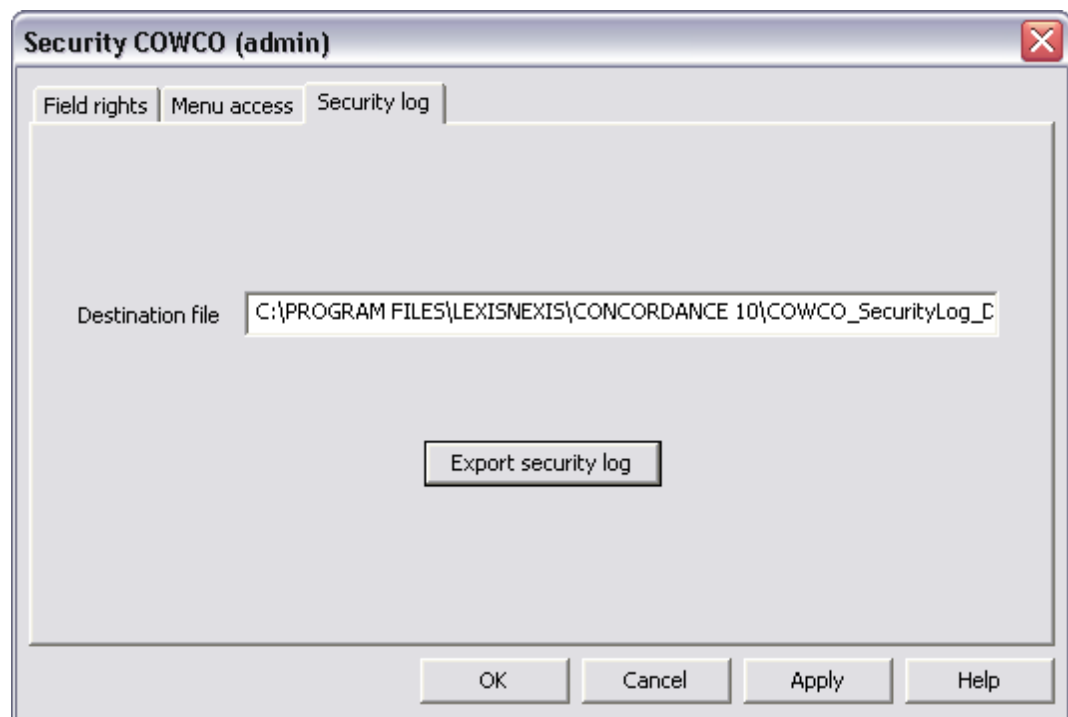
- In Concordance on the Security log tab of the Security dialog box
- A Microsoft Windows command line using the DumpSLog utility. This option can be used if you want to dump security log information using a script, unattended, or in a batch process.

The DumpSLog.exe file must be downloaded onto your computer before you can export security logs or enable or disable security logging using the DumpSLog utility.

Contact Concordance Technical Support at 1-866-495-2397 or concordancesupport@lexisnexis.com to download the file.

 To export a database's security log using Concordance:

1. Open the database in Concordance.
2. On the **File** menu, point to **Administration**, and click **Security**.
Clicking Security opens the Administration dialog box opens.
3. In the **User** field, type the administrator user ID.
4. In the **Password** field, type the administrator password.
5. Click **OK** to open the **Security** dialog box.
6. Click the **Security log** tab.



The Destination field displays where the [database name]_SecurityLog_Dump.csv log file will be created. The Destination field defaults to the directory where the database files are stored. You can edit the log file destination and file name in the Destination field.

7. Click the Export security log button to export the log and generate the database's **[database name]_SecurityLog_Dump.csv** log file.

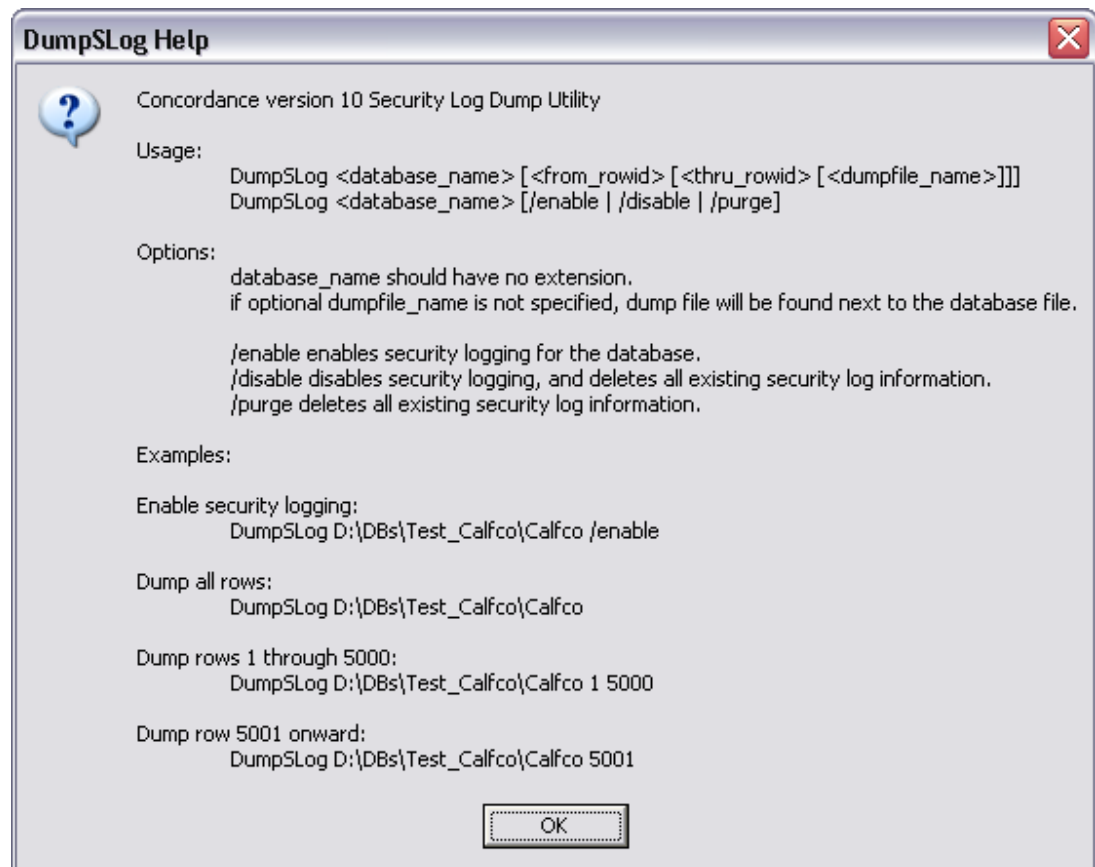
When the export finishes, the number of rows exported is displayed below the Export security log button.

■ **To export a database's security log using the DumpSLog utility:**

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog.exe** and then press Enter.

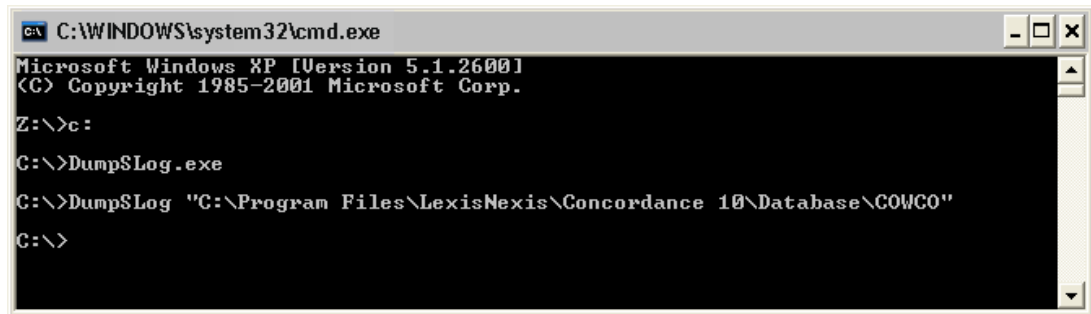
The DumpSLog Help dialog box opens and displays the DumpSLog utility's command syntax and examples. The DumpSLog utility allows dumping security log information using a script, unattended, or in a batch process. Determine what options you want to use to generate the security log.

5. Click **OK** to return to the cmd.exe command prompt.



6. Type the security log command you want to use and press Enter.

Be sure to type quotation marks around the database directory in the command. For example, DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO"



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>c:
C:\>DumpSLog.exe
C:\>DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO"
C:\>
```

The database's [database name]_SecurityLog_Dump.csv log file is created in the same directory as the database.

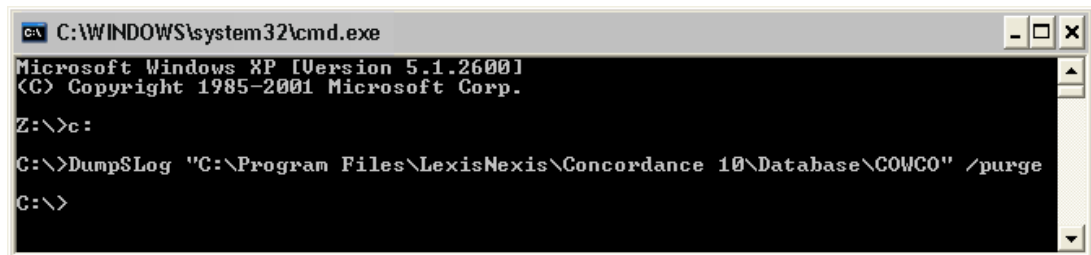
Purging Security Logs

Security logs should be purged on a regular basis for optimal database performance. Security logging information is stored in a table within the .trk file, and if the security log becomes too large, it can slow down the overall performance of the database. The DumpSLog.exe utility can delete database security logs using the /purge parameter. When you purge a database's security log, the utility deletes all existing security log information for the database.

To purge a database's security log:

1. On the **Start** menu, click **Run** to open the **Run** dialog box.
2. Type **cmd** in the **Open** field and click **OK** to open the **cmd.exe** command prompt.
3. Navigate to the folder containing the **DumpSLog.exe** file.
4. At the command prompt type **DumpSLog "[database path and name]" /purge** and then press Enter.

Be sure to type quotation marks around the database directory in the command. For example, `DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /purge`



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>c:
C:\>DumpSLog "C:\Program Files\LexisNexis\Concordance 10\Database\COWCO" /purge
C:\>
```

Security Log Format

The security log contains the following fields:

- **RowID**
- **UniversalTime**
- **UserID**
- **UserDomainLogin**
- **UserComputerName**
- **UserIDAffected**
- **EventName**
- **EventDetail**

The following event types are stored in the security log:

EventName	EventDetail (with sample data)
FieldRights	STARTPAGE:RW,ENDPAGE:R-
MenuAccess	Disabled: FILE
UserDeleted	SmithJH, Legal/SmithJH
UserAdded	SmithJH, Legal/SmithJH
RightsExport	To: <file path>
RightsImport	Begin import from: <file path>
RightsImport	End import from: <file path>
SessionStarted	Settings: SecurityEnabled=0 LogonRequired=0
SessionEnded	Settings: SecurityEnabled=0 LogonRequired=0

Setting Preferences

About preferences

Preferences for reviewers and administrators involve three main topics:

- Preferences – various settings that affect all users using Concordance, Concordance Native

Viewer, Concordance Image, and additional programs you choose to launch from Concordance.

- Table Layout – custom setting options available and accessible by all users to create both private and public table layouts.
- Custom Menus – custom menus added by administrators so tools are accessible from the Menu bar, such as CPL scripts or query files.

Defining preferences

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

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

The Preferences dialog box contains seven tabs:

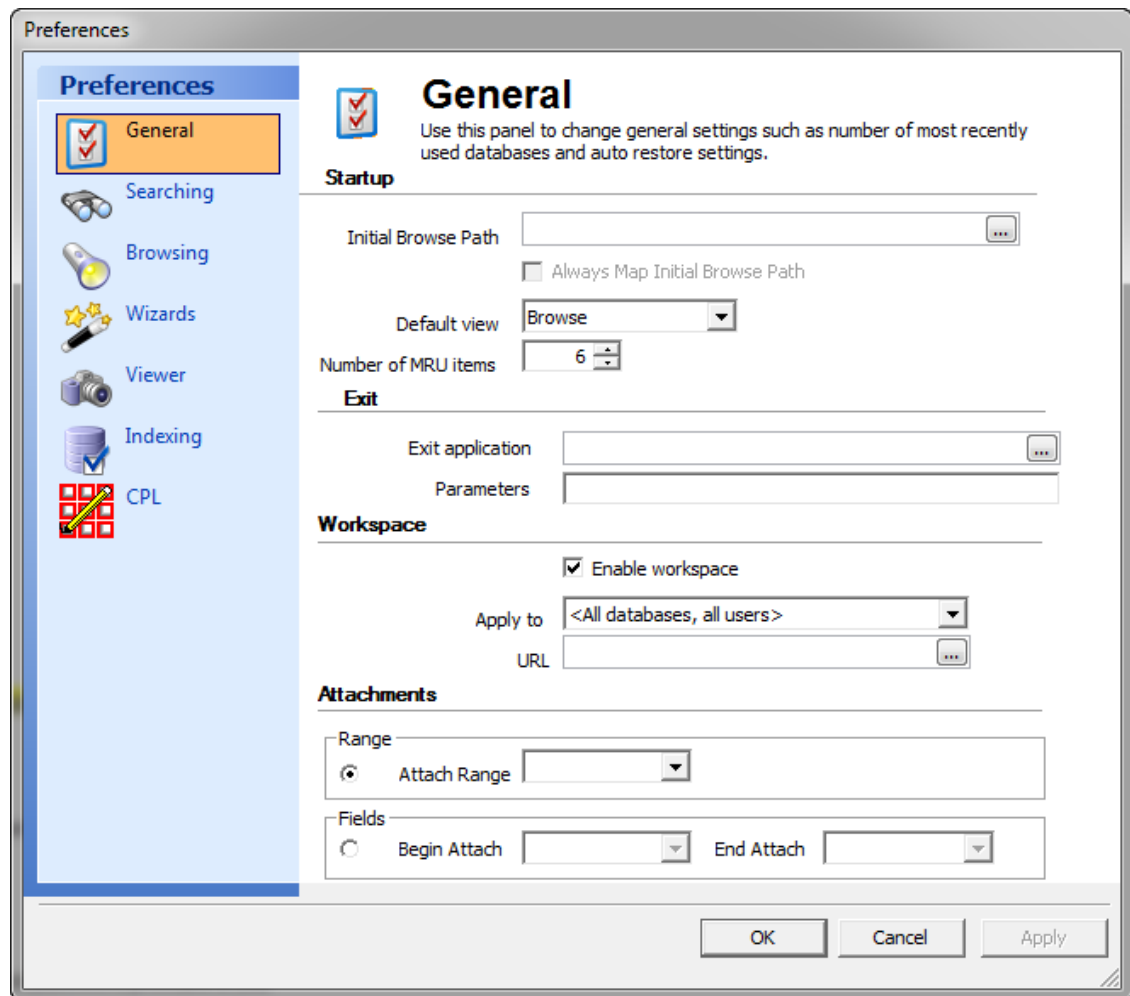
- **General** - settings used when starting and closing Concordance, enable/disable Workspace options, and assigning fields for attachments.
- **Searching** - settings for the default search behavior and search engine.
- **Browsing** - settings for the title bar field, default query field, and tag and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

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

For more information about customizing the start-up view in Concordance, 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:\LexisNexis\MyDatabases opens the MyDatabases folder when selecting Open database from the Databases task pane. During each Concordance 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, Concordance resets the browse path to the original Initial Browse Path field setting.

You need to restart Concordance 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.

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 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.

The Exit application field allows you to set up an application to automatically launch after Concordance is closed, like a reviewer time card application. Concordance 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 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.

By default, the Workspace tab is displayed and contains links to the LexisNexis 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, leave the **Enable workspace** check box selected. If you do not want to display the **Workspace** tab, clear the check box.

11. If you want the **Workspace** tab settings to apply to all users in all databases, in the **Apply to** field, choose **<All databases, all users>**. If you only want the **Workspace** tab settings to only apply to the local user, choose **<local user only>**.

12. 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://lexisnexis.com/concordance.

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:\LexisNexis\Internal_Links.htm or \\MyServer\MyFolder\myhtm.htm.

13. 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.

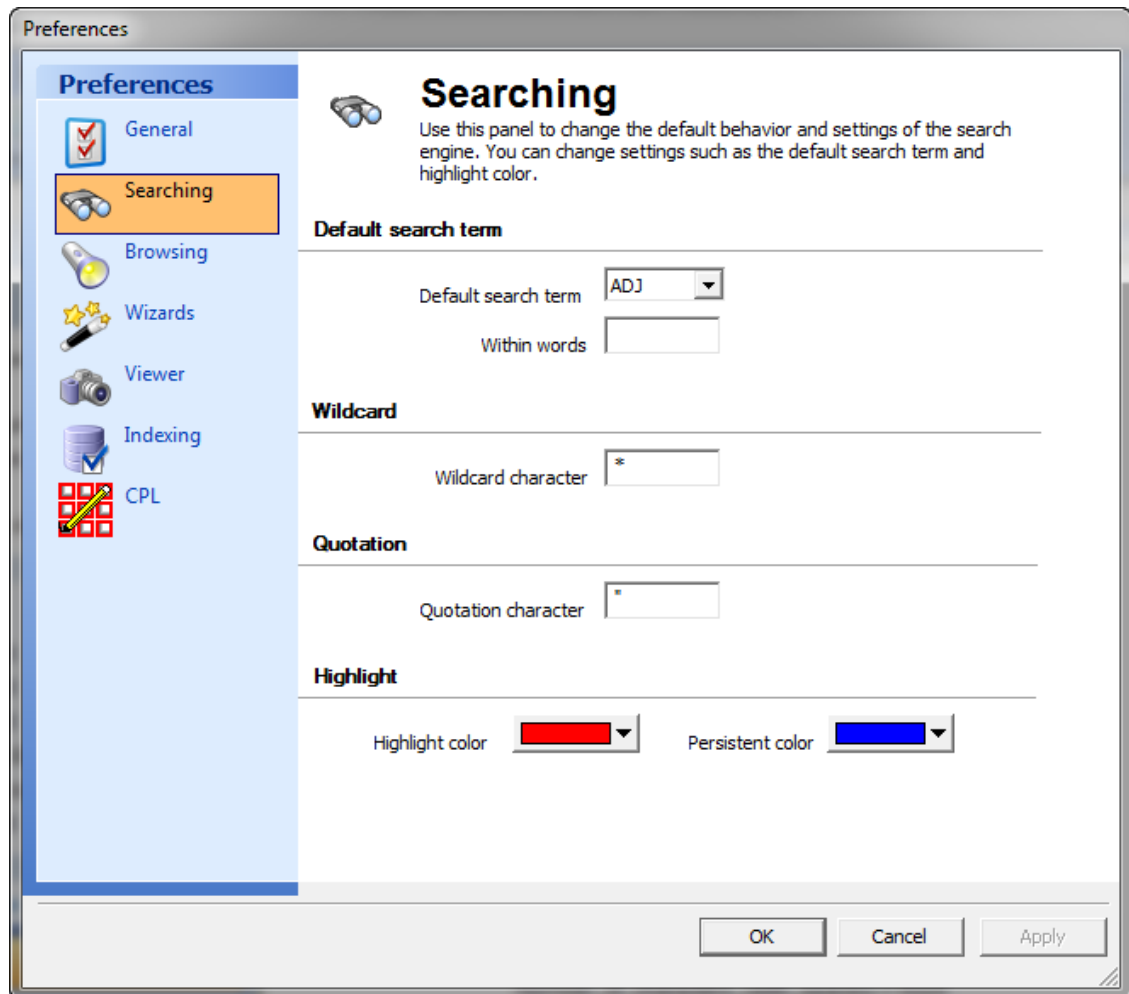
 When using the Find Attachments feature, it is best practice to setup the fields as paragraph type fields to increase the performance and make sure to index/reindex the database. For more information about the Find Attachments feature, see Finding attachments.

14. 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 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 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.

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 `<dbname>_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 is restarted* message.

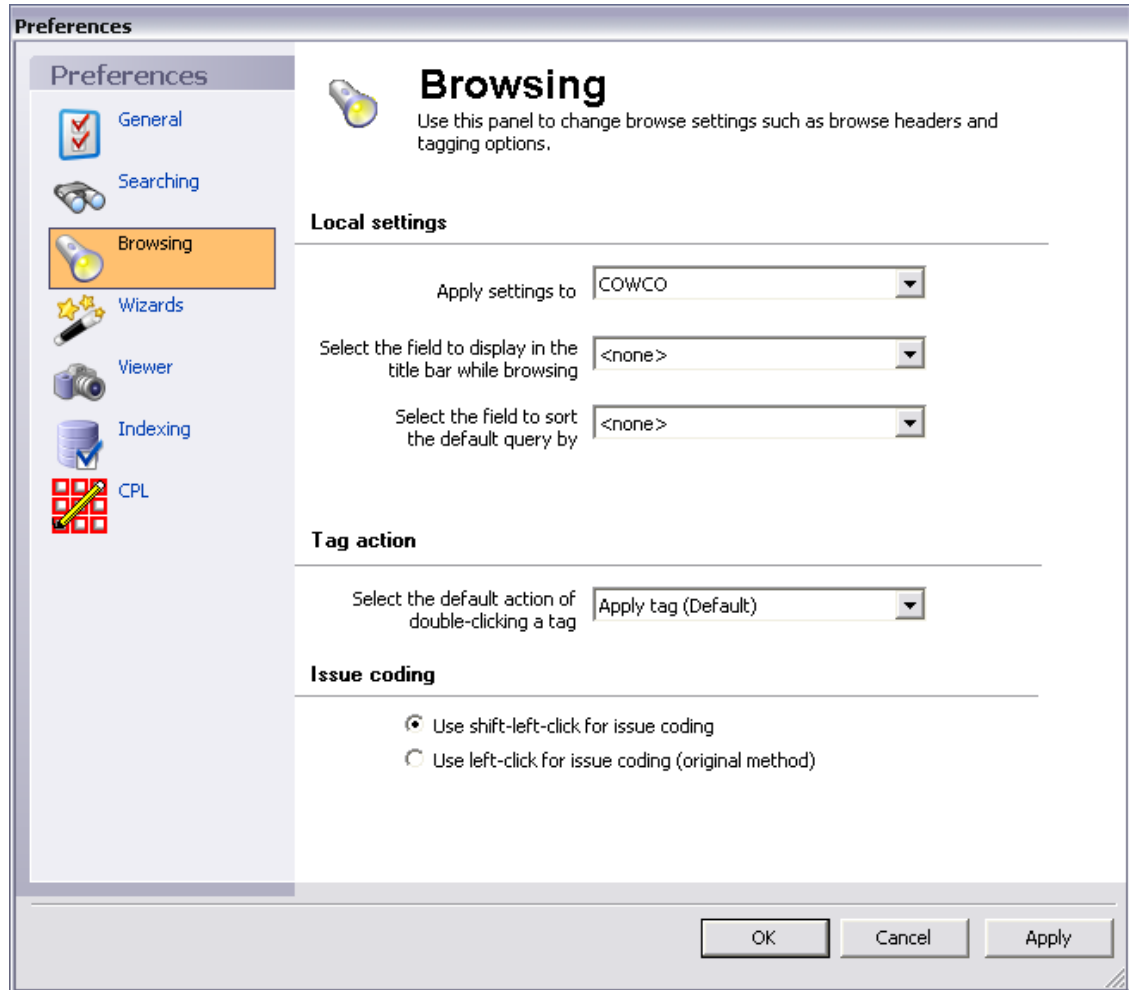
9. Click **OK**.

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 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 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. 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. For FYI Reviewer, the change will not take effect until you log out and log back into FYI Reviewer.

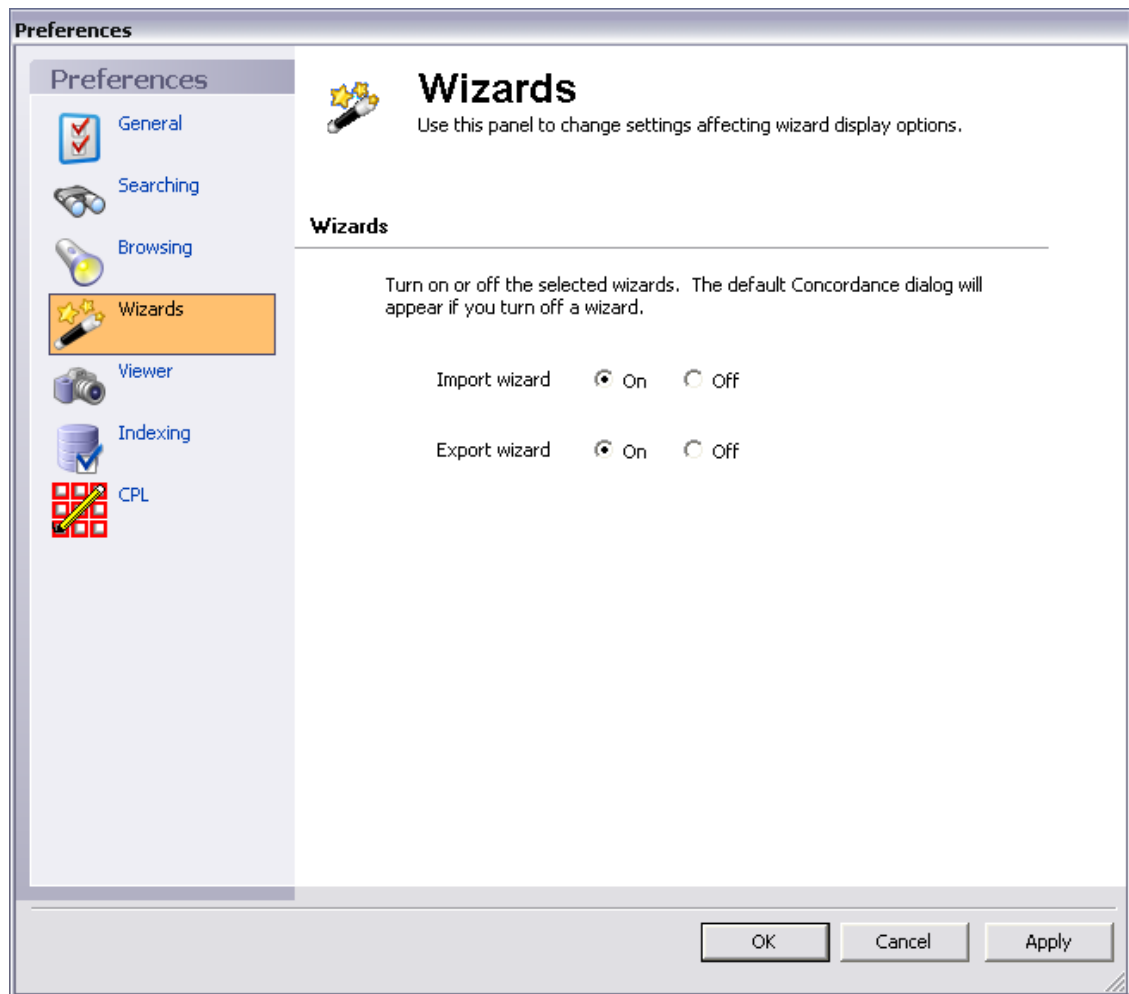
7. Click **OK** to save your changes.

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

8. Click **OK**.

 To set Wizards 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 **Wizards** tab.



The settings on the Wizards tab allows you to enable or disable the Import Wizard and Export Wizard for delimited text files. The Import Wizard guides you through the process of loading delimited text files into Concordance. The Export Wizard guides you through the process of exporting a Concordance database to a delimited text file. By default, both wizards are enabled.

For advanced users, the wizards may be unnecessary. When the Import Wizard is disabled, pointing to Import on the Documents menu, and clicking Delimited text opens the Import Delimited Text dialog box. When the Export Wizard is disabled, pointing to

Export on the Documents menu, and clicking To a delimited text file opens the Export Delimited ASCII dialog box.

 The import and export wizard settings on the Wizards tab in the Preferences dialog box only apply to the Import Wizard and Export Wizard for delimited text files. They do not affect the import and export wizards for e-documents, e-mails and Concordance databases.

3. To enable the **Import Wizard** or **Export Wizard** for delimited text files, click the **On** option.

To disable the Import Wizard or Export Wizard for delimited text files, click the Off option.

4. Click **OK** to save your changes.

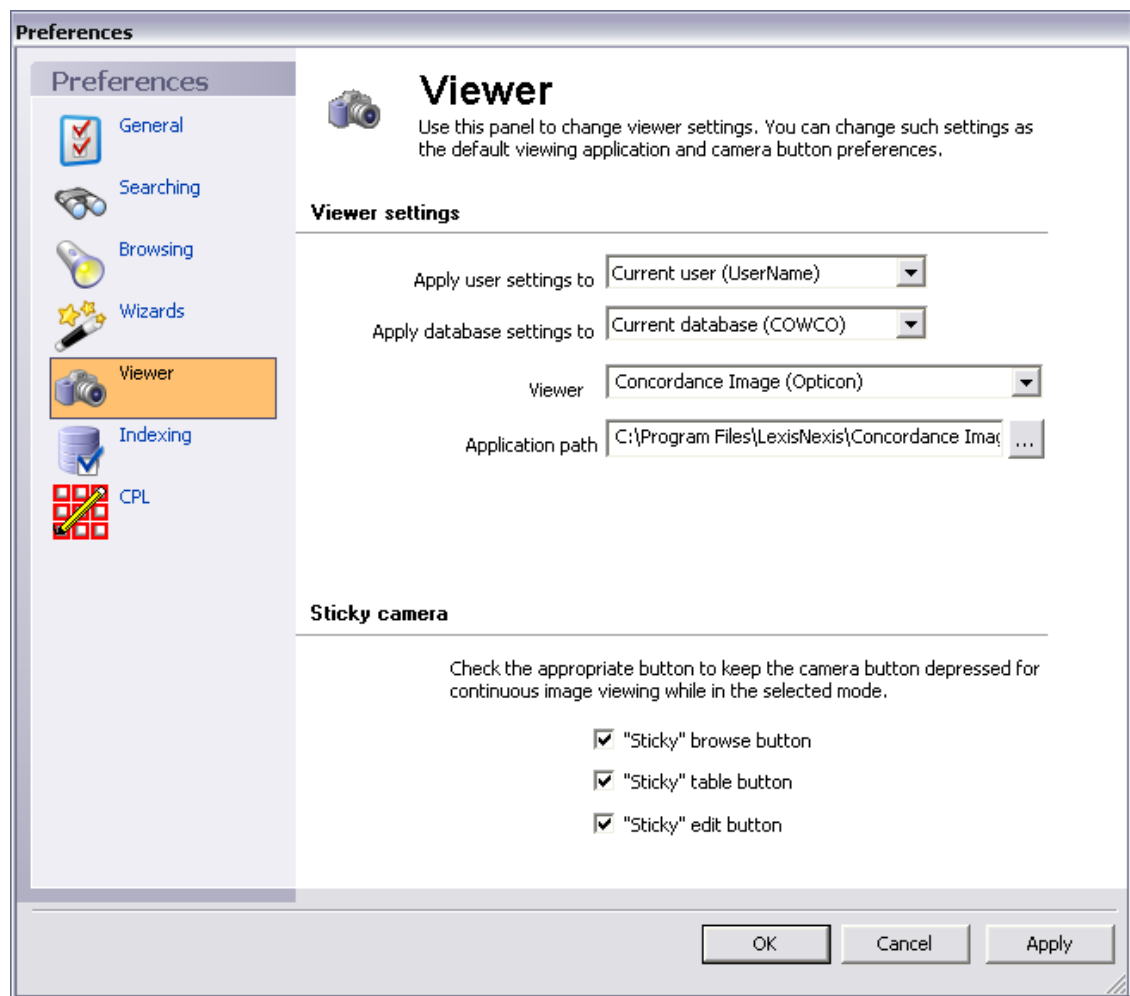
Clicking OK opens the *Changes may not be reflected until Concordance is restarted* message.

5. Click **OK**.

To set Viewer 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 **Viewer** tab.

The settings on the Viewer tab define the image viewer settings by user and database, and define the View Image (camera) button settings for Concordance.



You can apply the viewer settings to the current user or all users in the database, and can apply the viewer settings to only the current database or all Concordance databases.

Viewer settings that are applied to all databases are stored in the local user's registry settings.

Viewer settings that are applied to a specific database impacts all users that access the database. The viewer information is stored in the .ini file of the selected database.

3. In the **Apply user settings to** field, click **Current user (user name)** or **All users**.
4. In the **Apply database settings to** field, click **Current database (database name)** or **All databases**.

If you click a specific database, the viewer setting applies to all users that access the database. If you click All databases, the viewer settings only apply to the current user for all databases.

5. In the **Viewer** field, click the application you want to use as the default image viewer for Concordance.

6. In the **Application path** field, enter the file path or click the browse button and locate the .exe file for the viewer application specified in the Viewer field.

 You need to restart Concordance for this change to take affect.

You can use one of the following applications as the default image viewer for Concordance:

- Concordance Image
- Concordance Native Viewer
- CPL (Concordance Programming Language)
- IPRO
- IPRO Thin Client

Depending on which application you click in the Viewer field, other fields may be displayed in the Viewer settings section.

 To use Concordance Image as the default viewer:

1. In the **Viewer** field, click **Concordance Image (Opticon)**.
2. Click the ellipses (...) button next to the **Application path** field, to open the **Open** dialog box.
3. Locate and click the *ConcordanceImage.exe* file, and click **Open**.

 To use Concordance Native Viewer as the default viewer:

1. In the **Viewer** field, click **Concordance Native Viewer**.
2. Click the ellipses (...) button next to the **Application path** field, locate and click the *ConcordanceNativeViewer.exe* file, and then click **Open**.

 To execute a CPL when you click the View Image button in Concordance:

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

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

1. In the **Viewer** field, click **CPL**.

When you click CPL, the Viewer CPL field is displayed on the Viewer tab.

2. Click the ellipses (...) button next to the **Viewer CPL** field, to open the **Open** dialog box.
3. Browse to and click the .cpl file to execute when you click the **View Image** button in Concordance, and click **Open**.

Clicking Open adds the CPL file path to the Viewer CPL field.

To use IPRO as the default viewer:

1. In the **Viewer** field, click **IPRO**.

When you click IPRO, the Application path and Viewer CPL fields are displayed on the Viewer tab.

2. Click the ellipses (...) button next to the **Application path** field, to open the **Open** dialog box.
3. Browse to and click the IPRO.exe file, and click **Open**.

If IPRO is not running when the View Image button is clicked, Concordance requests Microsoft Windows to start the program using the program path and file name entered in the Application path field.

4. Click the ellipses (...) button next to the **Viewer CPL** field, to open the **Open** dialog box.
5. Browse to and click the applicable .cpl file, and click **Open**.

You can download the CPL script from www.iprotech.com.

Clicking Open adds the CPL file path to the Viewer CPL field.

For more information about the IPRO viewer and setup options, see the IPRO documentation.

To use IPRO Thin Client as the default viewer:

1. In the **Viewer** field, click **IPRO Thin Client**.

When you click IPRO Thin Client, the Alternate project name field is displayed on the Viewer tab.

2. In the **Alternate project name** field, enter the alternate project name.

For more information about the IPRO Thin Client viewer and setup options, see the IPRO documentation.

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 view.

By default, the Sticky browse button, *Sticky* table button, and *Sticky* edit button check boxes are selected.

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

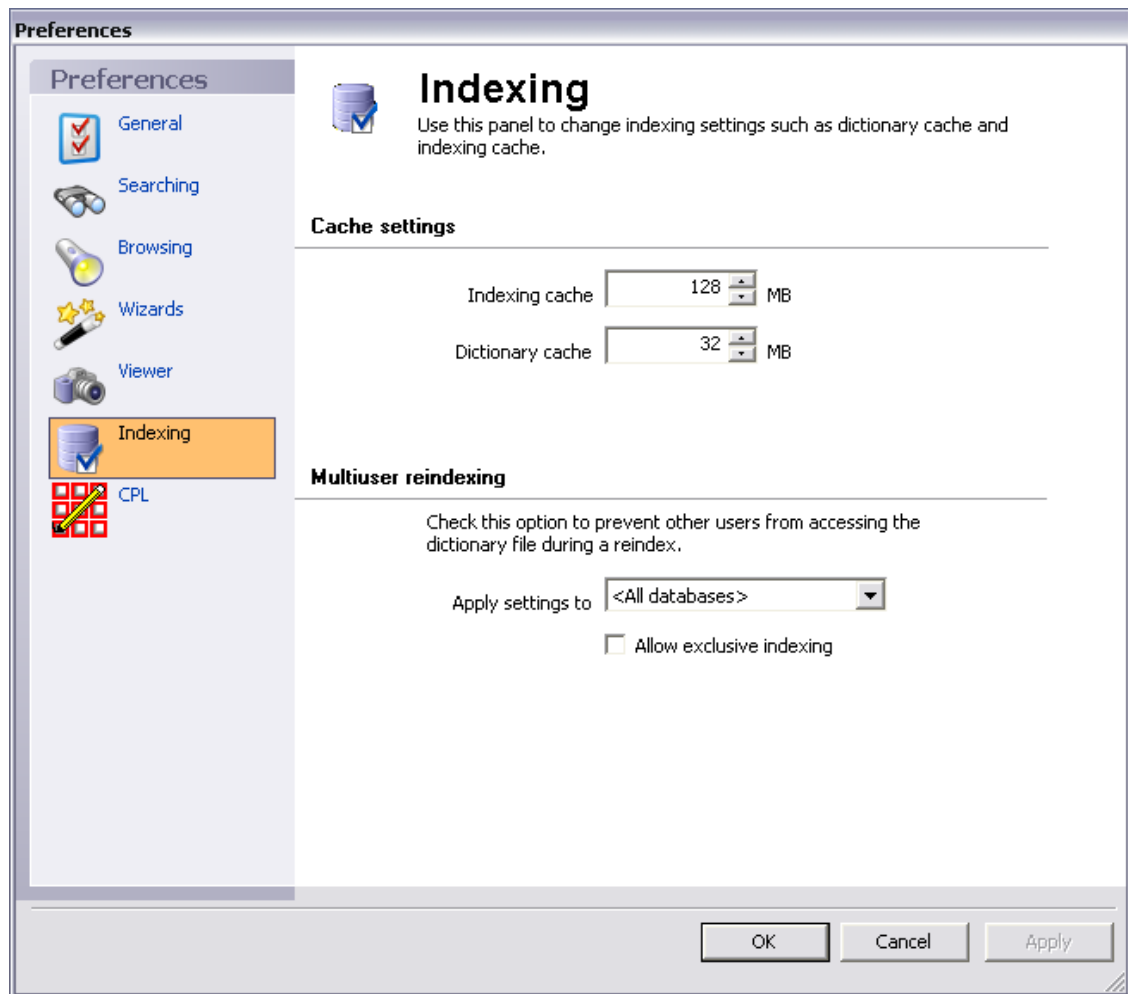
Clicking OK opens the *Changes may not be reflected until Concordance is restarted* message.

8. Click **OK**.

 If nothing happens when you click on the View Image button, verify that viewer settings are pointing to the appropriate viewer and are not unintentionally different for individual databases.

To set Indexing 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 **Indexing** tab.



The settings on the Indexing tab define the Concordance cache settings, which is the amount of memory allocated to indexing and reindexing, and define dictionary access during reindexing.

Indexing and reindexing performance varies with the amount of system resources that you can dedicate to it. Giving Concordance more memory and fast Microsoft Windows NTFS formatted drives is one of the most important things you can do.

For more information about recommended database cache settings, see the Cache Preferences section in the System Requirements topic.

The Indexing cache field defaults to 128 MB and the Dictionary cache field defaults to 32 MB.

3. To modify the indexing cache setting, in the **Indexing cache** field, type or select the cache size that is appropriate for your user's computer and organization's guidelines.

The indexing cache memory is only used during the indexing process. It is released back to the operating system when indexing completes.

Large allocations index databases faster. Be careful not to allocate more memory than your workstation can afford. For instance, on a workstation with 256MB of RAM, you can

safely allocate 176MB to indexing and 16MB to the dictionary cache. This leaves 64MB for the operating system. With more memory available, plan on leaving 128MB for the operating system and giving the rest to the indexing cache. A memory starved 64MB workstation should allocate no more than 16MB to the indexing cache and 4MB to the dictionary cache. Concordance logs the allocation and indexing time in the Concordance_[version #].log.

4. To modify the dictionary cache setting, in the **Dictionary cache** field, type or select the cache size that is appropriate for your user's computer and organization's guidelines.

This dictionary cache setting is used for all list files, all of the time, not just during indexing. List files include the database dictionary, the database .key file, the stopword files, files for spell checking, miscellaneous .lst files, security and password files, and so on.

Indexing makes extensive use of the dictionary cache. Increasing the size of the cache will especially improve indexing performance on large natural language text and OCR databases. A setting in the 16-32MB range is usually enough.

The Multiuser reindexing section determines whether users are prevented from accessing the dictionary, which prevents users from searching, while a reindex is performed on a specific database or all databases.

Checking the Allow exclusive indexing check box in a particular database secures these settings while the updates are made. However, this setting only marginally increases processing time and is considered optional based on need.

By default, the Apply settings to field is set to <All databases> and the Allow exclusive indexing check box is not selected, which keeps the database available to other network users during reindexing.

5. To modify the multiuser reindexing settings, in the **Apply settings to** field, click **<All databases>** or the current database.
6. To prevent users from accessing the dictionary and prevent users from searching while a reindex is performed, select the **Allow exclusive indexing** check box.

To allow users to access the dictionary and search while a reindex is performed, clear the Allow exclusive indexing check box.

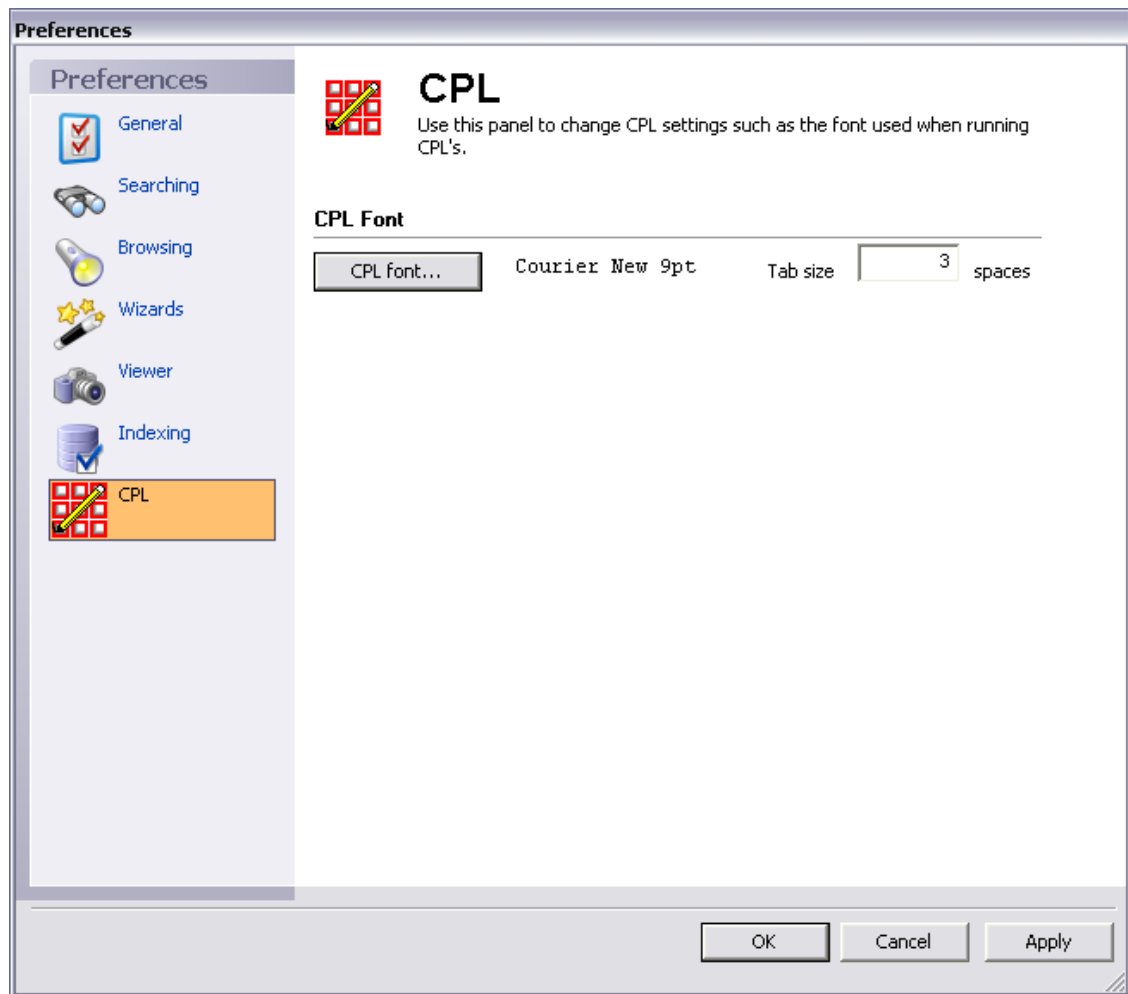
7. Click **OK** to save your changes.

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

8. 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.

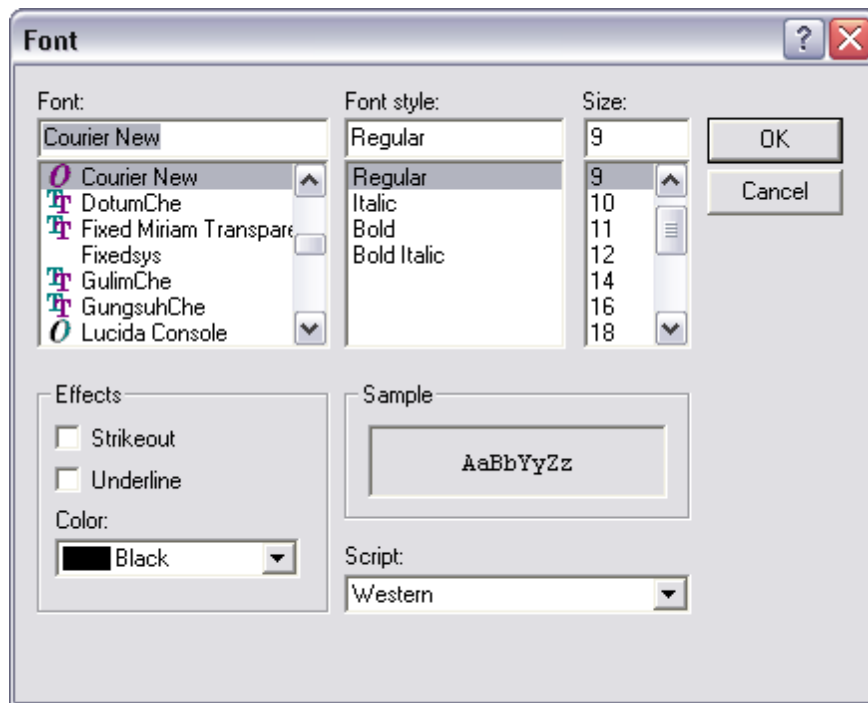


The CPL tab determines the font and tab size settings used when running Concordance Programming Language (CPL) programs.

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.

Clicking the CPL font button opens the Font dialog box.



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.

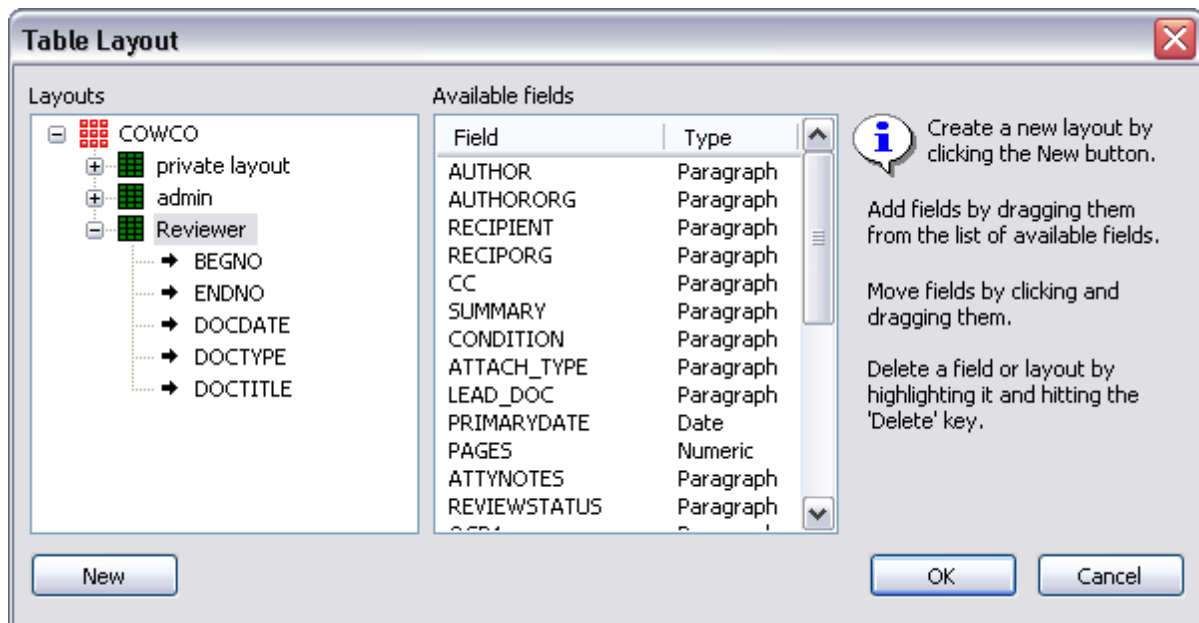
Clicking OK opens the *Changes may not be reflected until Concordance is restarted* message.

7. Click **OK**.

Using table layouts

The Table view uses table layouts to determine the fields and order of the fields displayed within the view. Table layouts can be used to customize viewing preferences or to support sort methods specific to a review.

Table view layouts are created and maintained on the Table Layout dialog box. For each database, each user has one private layout, that is accessible only to the user. Any additional layouts created for a database are public and accessible to everyone using the same database. A database's public layouts can be created, edited, or deleted by anyone in the database.



- Be selective when creating table layouts for a database. Too many table layouts in a database can slow down the database's processing speed.

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

- If you are using Table View to display long documents, such as depositions or resumes, you can get much faster performance if you do not display full text Paragraph fields. If necessary, add fixed length fields to your database, which have identifying information, such as a name, date and serial or volume number. Then use those fields for Table View. By selecting only fixed length text, date or numeric fields, large full text portions are not loaded. This improves performance for long document types.

- It is recommended that the .layout file not be marked as Read-Only as this will prevent users from creating or switching layout views.

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.

- 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.

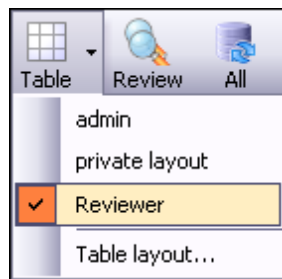
4. Click **OK** to close the **Table Layout** dialog box and apply your changes to the **Table** view.

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 **Table** button arrow and 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. When you delete a table layout, it is deleted for all users using the same database.

You cannot delete your private table layout or the table layout currently displayed in the Table view. The Delete command in the Table Layout dialog box is unavailable for private table layouts and the table layout currently displayed in the Table view.

To delete the public table layout currently displayed in the Table view, you first need to display a different layout in the Table view.

1. On the **Standard** toolbar, click the **Table** button arrow, and click **Table layout** to open the **Table Layout** dialog box.
2. Right-click the layout you want to delete in the **Layouts** tree and then click **Delete**.

Using sorting layouts

The Sorting feature in Concordance 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.

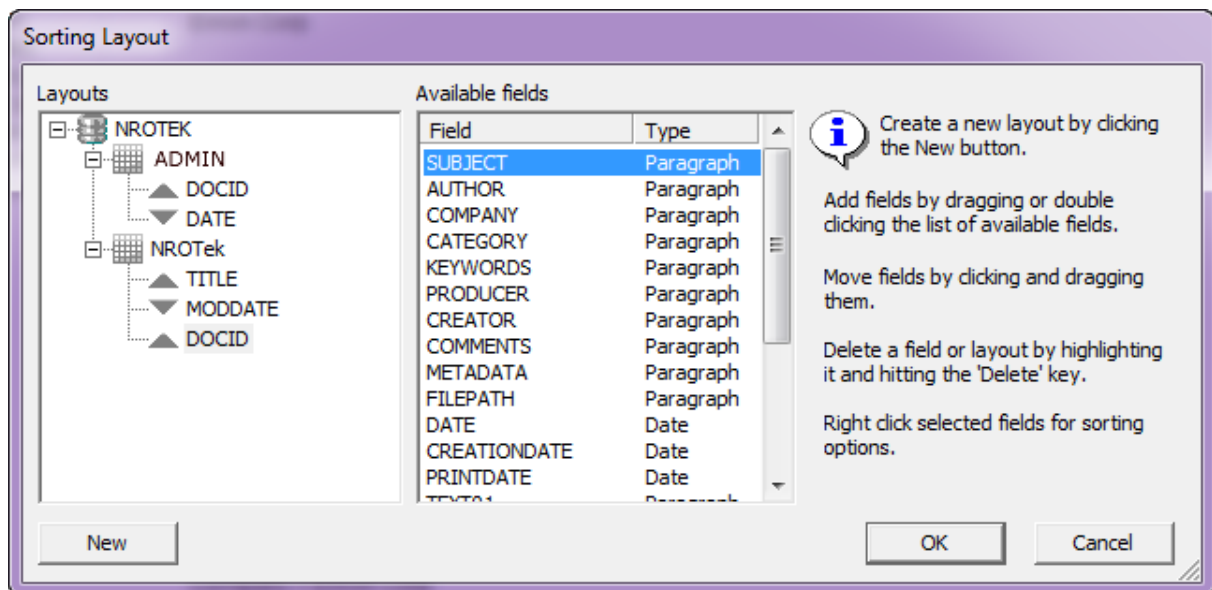
Sorting layouts are specific to a database and user. Therefore, if you are working in a database and using a sorting layout that you created, and another user accesses the same database, the sorting layout you are using is not affected by the other user or their sorting layout.

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 sorting 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**.

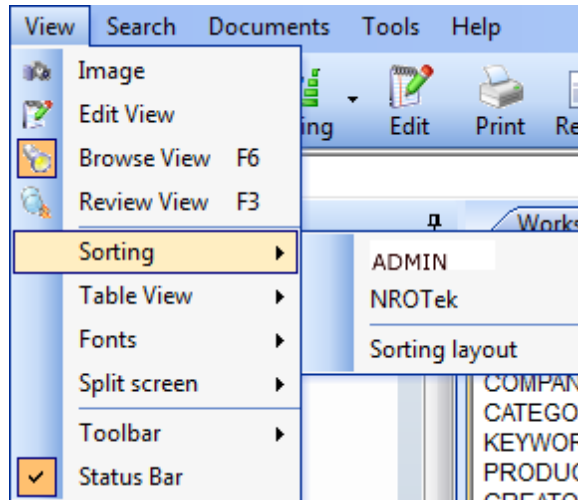
To modify a sorting layout

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 sorting 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.

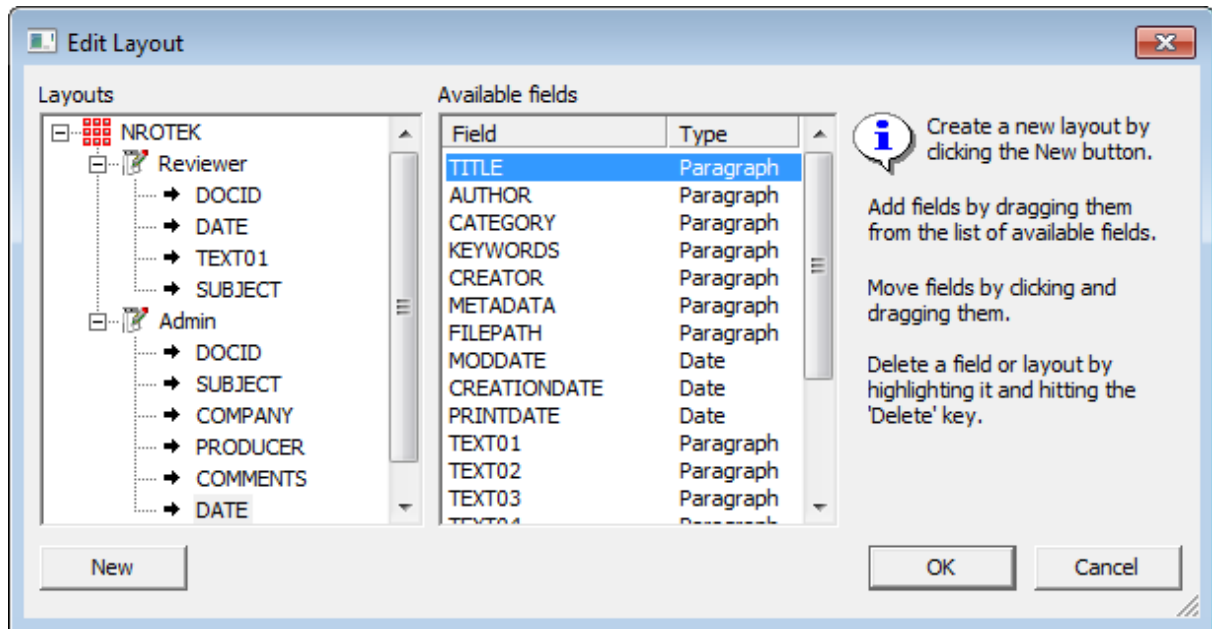
 The default user sort layout is automatically created when the database is opened. This sort layout cannot be renamed.

Creating edit layouts

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

Concordance uses edit layouts to determine the 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 <dbname>.Editlayout file. An edit layout can be created or edited by anyone in the database. However, only the Concordance 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, point to **Edit View**, and then click **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, point to **Edit View**, and then click **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.

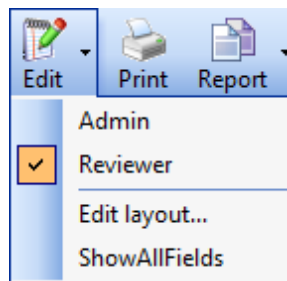
To view saved edit layouts

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, point to **Edit View**, and then click the layout name to view.
- On the Standard toolbar, click the **Edit** button arrow, and then click the layout name to apply..
- On the Standard toolbar, click the **Edit** button, right-click in a field, point to **Layout** and then click the layout name to view.

The check mark next to a layout indicates the edit layout currently displayed in the Edit view.



Adding custom menus

Adding custom menus and custom menu commands to Concordance is one of the many features you have available to make your administration job much easier. Having CPL scripts and databases accessible as a shortcut in a menu provides instant access to the tools you need to use frequently. You can apply these menus and menu commands to the current database or all databases. You can add custom menu commands to existing or custom Concordance menus. By default, all users will be able to use and access the custom menu and menu command. To restrict custom menus and menu commands to a specific user, you need to add the user and the custom menu command for the user in the Added Menu Items dialog box.

If you are familiar with programming and took a Concordance CPL class, you can add your own CPL scripts to a custom menu, which launches these programs without having to navigate to their directory folder.

- ✍ Custom menu commands are not listed in the Security dialog box for enabling and disabling menu access. If you need to restrict access to custom menus and menu commands, be sure to add the custom menu command to specific users in the Added Menu Items dialog box.

The following file types can be opened from Concordance custom menus:

- Database file (.dcb, .fyi)
- CPL file (.cpt, .cpt)
- Report file (.arp)
- Print file (.fmt)
- Concatenation file (.cat)
- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)

Added Menu Items

User: Default

Menu item: File, C:\Program Files\LexisNexis\Concordance 10\CPL\TagSaver_v10.00.cpl, New, Delete

Menu: CPLs, Position: -1

Display name: TagSaver_v10.00.cpl

Function:

Added menu items:

Database: COWCO

Menu	Menu Item	File	Function	Position
CPLs	TagSaver_v10.00.cpl	C:\Program Files\LexisNexis\Concordance 10\CPL\TagSaver_v10.00.cpl		-1

Move up, Move down

OK, Cancel

To add a custom menu and menu command:

1. In Concordance, open the database you want to add a custom menu and custom menu command.
2. On the **File** menu, point to **Administration**, and click **Added menu items**.

The User field comes with a pre-defined Default user ID.

The Default user ID works on databases that do not have security enabled or and databases with a default user ID defined in the Security dialog box.

Creating a custom menu and/or menu command for the Default user ID allows all users to view and access the menu and menu command.

To restrict access to the custom menu and/or menu command, you need to add each of the users you want to have access to the menu and/or menu command to the User field, and create the custom menu and/or menu command for each of the users you created. The users you create must already be added to the database, and the user IDs you create in the User field must match the users' database user IDs in the Security dialog box.

When a user is added as a database user and then added to the User field in the

Added Menu Items dialog box, the custom menu commands assigned to the Default user ID in the Added Menu Items dialog box will not be available to this user. You will have to assign the same custom menu commands to the individual user in order for the user to access these menu commands.

3. To add a user to the **User** field, select all the text in the user list, and type the new user name, and click the **Add** button.

 Adding a user to the **User** field in the **Added Menu Items** dialog box does not add the user to the database. To add a user to the database, see Setting up security.

To add a custom menu and/or menu command for an existing user ID in the User field, in the User field, click the applicable user ID.

In the Database field, located in the Added menu items section, the current database name is displayed. The custom menu and/or menu command will be created in the current database unless you want to add the custom menu and/or menu command to all databases. If the current database is part of a concatenated database group, you can also add the custom menu and/or menu command to any database in the concatenated group.

4. To add the custom menu and/or custom menu command to all databases, in the **Database** field, click **All databases**.

To add the custom menu and/or custom menu command to database in a concatenated database group, in the Database field, click the applicable database.

5. In the **Menu item** section, click the **New** button to create the custom menu and/or menu command.
6. Click the **File** button to open the **Open** dialog box.
7. Browse to and click the file you want to launch from the custom menu command, and click the **Open** button.

Clicking the Open button, adds the file name and path to the File field.

Concordance custom menus can open the following file types:

- Database file (.dcb, .fyi)
- CPL file (.cpl, .cpt)
- Report file (.arp)
- Print file (.fmt)
- Concatenation file (.cat)
- Snapshot file (.snp)
- Query file (.qry)
- PDF file (.pdf)

 The Added Menu Items feature only works with specific IPRO CPL scripts. Be certain to verify the supported IPRO scripts before loading them into a database.

You can add a custom menu command to a custom menu or an existing Concordance

menu.

8. To add the custom menu command to an existing Concordance menu, in the **Menu** field, click the menu you want to add the custom menu command.

To add the custom menu command to a custom menu, in the Menu field, type the name of the custom menu you want to create. The menu name you type in the Menu field is the menu name that will be displayed on the Concordance Menu bar.

For custom menus, the Position field determines where the menu is displayed on the Menu bar.

For custom menu commands in an existing Concordance menu, the Position field determines where the custom menu commands is displayed in the menu.

The Position field defaults to -1.

9. In the **Position** field, type the position number you want the custom menu and/or custom menu command to be displayed.

When you are creating a custom menu, zero is the first position on the left on the Menu bar. For example, if you typed 0 in the Position field, the custom menu will be displayed to the left of the File menu. Positive position numbers will move the custom menu the number of places to the right. For example, if you type +3 in the Position field, the custom menu will be displayed 3 places to the right. Typing -1 places the custom menu to the right of the Help menu.

Negative position values start at the right and work their way left on the Menu bar. Positive position values start at the left and work their way right on the Menu bar.

When you are creating a custom menu command, zero is the first position at the top of the menu. Positive position numbers will move the custom menu command the number of places down from the top of the menu. For example if you add a custom menu command to the File menu and type 3 in the Position field, the custom menu command will be displayed between the Snapshot and Close commands on the File menu. Typing -1 places the custom menu command at the bottom of the menu.

Negative position values start at the bottom and work their way up the menu. Positive position values start at the top and work their way down the menu.

10. In the **Display name** field, type the custom menu command name as you want it to appear in the menu.



If the custom menu command opens a CPL program file, you can have Concordance run a specific function within the program file by adding the function value to the Function field. This should be a complete and valid CPL function call, such as `main()` or `myfunction("Hello", 1, 2, 3)`. This allows you to create a single CPL file with a complete set of functions to handle different menu items.

- ✎ Display names that contain the ampersand "&" or parenthesis "(" characters will not display correctly. Spell out the word "and" to include it in the display name.

11. To run a specific function within the CPL program file selected for the custom menu, in the **Function** field, type the full CPL function call.

For all other custom menu commands, leave the Function field blank.

Once you have finished adding a custom menu and/or custom menu command, it is listed in the Added menu items section. If you are creating multiple custom menus and/or custom menu commands, you can organize the display order of the custom menus, and the custom menu commands within the same menu by clicking the Move up and Move down buttons.

When determining the display position of custom menus and/or custom menu commands in relation to each other, sometimes it is easier to leave the Position field set to -1 for each menu and menu commands, and just use the Move up and Move down buttons to position them.

-  The custom menu and menu command list in the Added menu items section has a shortcut menu to make menu customization easier. The shortcut menu allows you to cut, copy, paste, and select all custom menu items. To open the shortcut menu, right-click one or more of the menus and/or menu commands in the list. You can select multiple menus and menu commands using SHIFT+click or CTRL +click.

With the cut, copy, and paste features you can create a set of menu items, copy them, and paste them into other user's profiles or other database profiles. This is the easiest way to replicate menus in the Added Menu Items dialog box.

12. Click **OK** to save your custom menu and/or custom menu command.

You may need to close out of Concordance and log back in to activate the new menu settings.

Backing Up and Archiving Databases

About backing up databases

There are a couple of options for backing up your Concordance databases. Before backing up your Concordance database, you need to determine how long the backup process may take, given the size of the database files. The backup process could take many hours, so having a solid estimate helps you plan backup maintenance schedules.

Research the network's automatic server backups and how it may impact Concordance database files. Database files automatically backed up in this manner often take longer to restore, therefore, they are probably not a practical method to rely on as your sole source for database copies.

-  Do not perform live backups if you are using backup software that locks files, even briefly. This has been known to cause read/write functions to the database files to fail, and can cause file synchronization or corruption issues. Check with your IT group and/or backup solution provider to verify that no file locking occurs before scheduling any backups on Concordance, Concordance Image, and FYI files that are in use.

Be aware that anti-virus, firewall, and backup software can often interfere with network traffic and the locking of files, and in effect, could cause Concordance, Concordance Image, and FYI Server software to crash.

It is best practice to use the following methods for routine backup procedures:

- Verify that you are not backing up your databases while they are in use either by tape or by manually making a copy. Any locking of files while users are updating those same files can produce erroneous results. Using snapshots on your data storage devices can reduce these effects because they do not lock the files.
- To create a backup of a Concordance database, use the Export Wizard provided in Concordance. Exported databases do not include security or tag history. To retain security in your back up, you can also replicate the database. To include tag history, run the TagSaver.cpl and TagHistoryandStoreIt.cpl. Either way, you are storing a backup of your database files in the event they need to be restored later.

When backing up databases, you should also consider the following:

- Replication of your database files within Concordance has a longer processing time, but this method retains security settings.
- If security is applied, back up the .sec files
- Back up tags using the TagSaver.cpl and TagHistoryandStoreIt.cpl
- Do not forget to copy over your list files, queries, exported security, and .gat files, etc.
- Verify that your antivirus does not scan any of the following file types: .trk, .key, .dct, .dir, .fzy, .layout, .sec,

- 📌 Backing up tags may take days for some databases, and loss of tagging information can jeopardize a case review. Please make time to research and test this process so you understand how to best schedule this task regularly.

Related Topics

Exporting databases
Exporting delimited text files
Replicating databases
Setting up security
Backing up tags
Storing tag history
About Concordance database files

About Concordance database files

Each Concordance database uses several files during operation. Only four are absolutely required to open and use a database. The four mandatory files are the database control block (.dcb), the numeric, date, and text file (.ndx), the text file (.txt), and the security file (.sec). The security file only exists for Concordance version 6.0 and later databases, and only if security has been enabled. All of the other files can be recreated without damaging the integrity of the data. At a minimum, these four files should be backed up for archival purposes.

For more information about backing up databases, see [About backing up databases](#).

- ✍ A B-tree file uses a tree data structure to provide fast search results. The tree data structure minimizes the number of times the database is accessed when searching for a record, resulting in faster searches.
- ✍ The .TRK file in Concordance version 10.x uses SQLite. SQLite is an embedded relational database engine, which brings more stability to the functions of the .TRK file. Because SQLite is an embedded database, SQLite does not increase the required maintenance and administration of Concordance.

Concordance Database Files

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.arf	Annotation reports	Contains the annotation report definition Used by the annotation report writer		
.arp	Report writer	Contains report definitions in plain text These files are created and saved by the report writer, and can be edited with any text editor program		
.cat	Concatenation	Stores a list of concatenated databases		
.cib	Imagebase	Stores association between media keys and native and image files including markup history (<i>Concordance Native Viewer only</i>)		SQLite file
.cpl	CPL script	Store Concordance Programming Language (CPL) scripts		

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.cpt	CPL script	Stores compiled versions of CPL script		
.csv	Security	Stores field and menu access for all users (when exported by user)		
.dat	Delimited text	Contains metadata and sometimes OCR for document records		
.dcb	Data control block	Database definition, including fields, document count, and other settings		
.dct	Dictionary	All unique words in the database, in alphabetical order This is not a plain text file, it cannot be read or edited by a text editor or word processor	B-tree file	
.dir	Imagebase	Stores image keys (<i>Concordance Image Only</i>)		
.fmt	Print settings	Saves print settings for reports generated using the standard print feature User generated file		
.fyi	Concordance FYI Server database	A link file that opens a database on a remote FYI Server		
.fzy	Fuzzy search dictionary	The fuzzy search dictionary contains homonyms for words in the search dictionary This file is created and updated by indexing and reindexing	B-tree file	
.gat	Back Up	A tag backup file that stores tagging information. Generated by running the TagSaver_v[version #].cpl		
.ini	Configuration settings	Stores various configuration settings		

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.ivt	Inverted text	Used with the dictionary during searches		
.key	Key fields	Field storage for fast relational searching	B-tree file	
.layout	Table layout	Stores the defined table layouts	B-tree file	
.sortlayout	Sorting layout	Stores the defined sorting layouts for the current database		
.lst	Word lists	Contains predefined values that can be selected from a list when editing fields When a list is assigned to a specific field, it's called an Authority List	B-tree file	
.ndx	Numeric, date, and text fields	Stores data for the fixed length field types: Numeric, Date, and Text		
.opf	Print settings	A Concordance Image print file that stores print settings for print jobs generated by Concordance Image (<i>Opticon</i>) User generated		
.qry	Query	Stores search query strings		
- redline s.dcb	Database	Stores markups and notes (<i>Concordance Image Only</i>)		
.sec	Security control	Stores passwords and security settings Erasing this file can lock up a database if security is enabled	B-tree file	
.snp	Snapshot	Stores search history and auto-restore settings		
.stp	Stopwords	Contains the noise words that are ignored during database indexing	B-tree file	

Concordance Database Files				
Name	File Type	Usage	B-tree Files	SQLite Files
.syn	Synonyms	Stores the user defined synonyms	B-tree file	
.tag	Tagged records	Tracks document tagging Note: This file is no longer used with Concordance version 9.5 and higher	B-tree file	
.tex	Text	Full text paragraph field storage		
.trk	Transaction tracking	Relational SQLite file structure that stores tags and tag histories, security (field and menu access for all users) and replication data		SQLite file
.vol	Volumes	Stores image volume information (Concordance Image Only)		
.xrl	Markup	Stores the current state of markups and placeholders (Concordance Native Viewer Only)		

Temporary Files

Concordance creates and uses temporary files, which are automatically erased when you leave the program. However, temporary files are not erased if there is a power outage or other problem which causes an irregular program termination. Concordance places the files in the system's temporary directory as defined by the Windows TEMP environment variable. The two most common functions that create temporary files are indexing and reindexing.

When indexing a database, two temporary files are saved in the local computer's temp directory. Both files begin with the prefix C- and end with the .tmp extension. These files represent the temporary .dct and .ivt files. They are not initially saved on the network server since network latency would severely decrease performance. When indexing is complete, the resulting .dct and .ivt files are copied to the network server.

When reindexing a database, the same temporary files are saved in the local computer's temp directory. In addition, a temporary dictionary file with a .dcb file extension is saved in the local computer's database directory. This file contains information from the newly created records. Near the end of the reindexing process, this dictionary file is merged with the main dictionary file on the network server.

For more information about indexing and reindexing, see About indexing databases.

About archiving databases

Archiving of databases is standard practice for corporate environments, and you will want to adhere to those guidelines with Concordance databases. You may want to make additional archives for maintenance reasons too, ensuring that you have adequate archive files for case history and research. Reviewers are known to come back, even years later, and want to research a case history if they are working on a similar one. Many vendors offer vault storage and web repository environments for data retrieval in the event of a disaster, or merely to restore data from an archive library.

Another consideration for you is to think about creating a database archive using Concordance. Because the storage capacity for records is vast, an archive library may work well for your organization in researching old records and case history data.

Minimum Required Files for Archiving

Task	File Type	Use
.dcb	Database	Primary database control block.
.ndx	Index	Fixed field and document status storage.
.tex	Text	Full-text paragraph field storage.

Archiving Guidelines:

- Run the Tag To Field command in the Tag and Issue Management dialog box, and the TagHistoryandStoreIt.cpl to track and manage tags in a field.
- There are three minimum files needed to archive a database: .dcb, .ndx, .tex.
- Remember to turn off security so the file is accessible by others.
- Export to a delimited text file because it is a universal archive format that is retrievable in years to come.
- Ask yourself whether you really need to archive images; these files are huge and require adequate media storage.
- Move files to a long-term, archive-quality media.
- Schedule data destruction per corporate policies; determine how long do you need to keep the copies.
- Keep an updated list of archive files for you or another administrator to reference.

Managing Databases

About managing databases

Ongoing maintenance of your Concordance database is standard practice as an administrator. Refer to this module to review database management guidelines and tips, and for general maintenance processes.

Database management includes the following procedures for quality control and maintenance:

- Backing up database files
- Subsequent loads
- Performing data entry and editing
- Creating Authority word lists
- Performing global replacements
- Checking for duplicate records
- Packing the dictionary
- Packing databases
- Zapping databases
- Modifying database field structure
- Replicating and synchronizing databases

Exclusive Administrator Processes

Some database management tasks require that all other users are logged out of the database when they are performed. The administrator is the only user allowed in the database when the following processes are occurring:

- Index
- Pack
- Zap
- Security
- Modify
- Replication/Synchronization
- Converting or upgrading to a current version

 To verify whether any users are currently logged on to Concordance, you need to be on a network license:

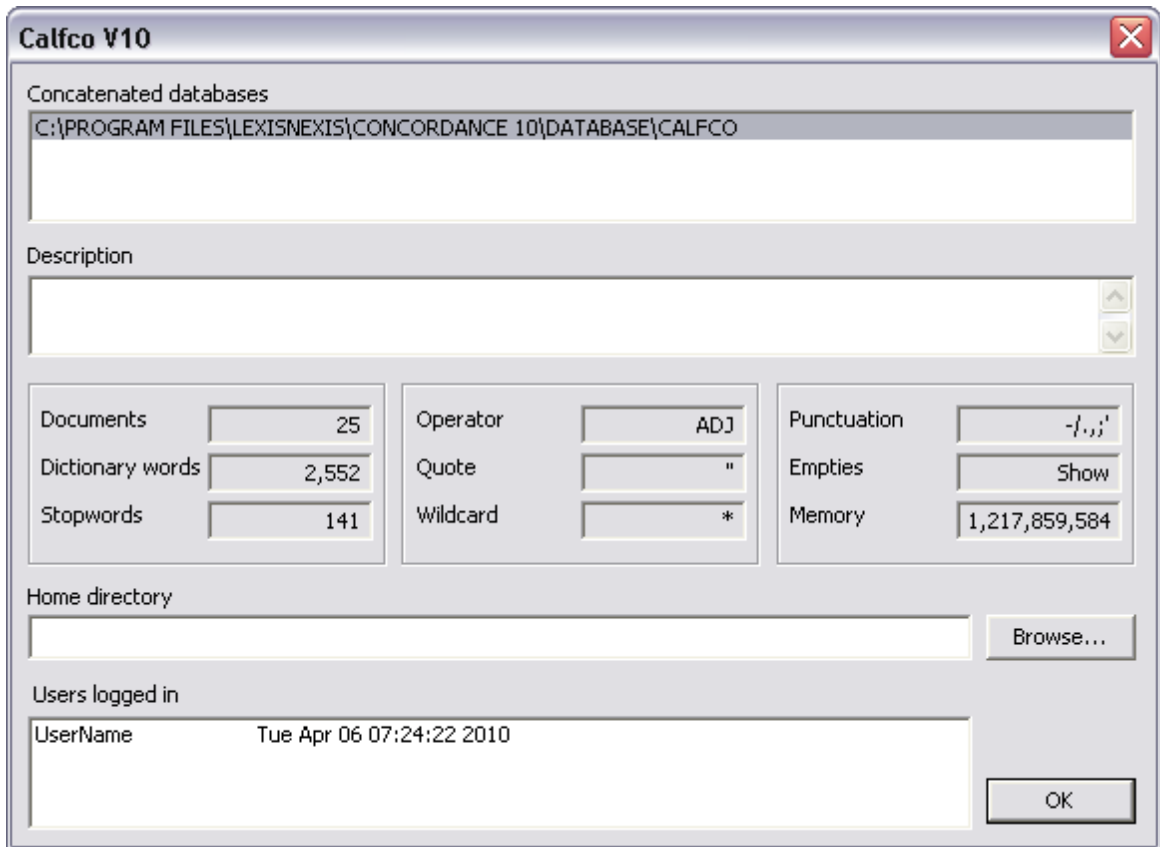
- To see users currently logged in, on the Help menu, click About Concordance
- To disconnect users: Call them, turn off their computers, call your network operator, or reboot the database home drive.

Reviewing Database Properties

For a summary of general database settings and information, review the Database Properties dialog box. You can also enter a database description here or change the home directory.

The Properties box allows you to:

- Review concatenated databases and directory paths
- Enter or review database descriptions that also displays in the Databases task pane and in the Create database from template dialog box.
- Review dictionary and punctuation information for full-text searching
- Change the database home directory (The directory defaults to the location of the .dcb file) for a user, which is helpful when saving reports, queries, snapshots, etc.
- View users currently logged in to the system based on the .ini file



Calfco V10

Concatenated databases
C:\PROGRAM FILES\LEXISNEXIS\CONCORDANCE 10\DATABASE\CALFCO

Description

Documents	25	Operator	ADJ	Punctuation	-/,,'
Dictionary words	2,552	Quote	"	Empties	Show
Stopwords	141	Wildcard	*	Memory	1,217,859,584

Home directory

Users logged in

UserName	
	Tue Apr 06 07:24:22 2010

OK

Loading additional data into databases

Typically, all data for a specific case is not processed or received at the same time. Subsequent loads of data may arrive on an ongoing basis. You may receive delimited text files to replace

existing data or need to load more data into existing records.

The matching import process is recommended for importing additional or replacement data into existing records. This method replaces the Overlay option in the Import Wizard.

When performing a matching import, you create a duplicate database structure and load the new delimited text file. This step allows for further quality control before changing your main database. The final step is using the Import a Concordance Database process to replace and append your new records by matching records using a common unique field.

When importing new data, consider the following:

- Run a test load by importing new data into an exported database structure
- Note the last record number on the status bar prior to importing the secondary database with the new data
- Reindex the database prior to loading the new data. After the data is loaded, on the Search menu, click Search for Edited Documents, to query only the records that you just loaded for verification of the number of records that needed to be loaded or to isolate the records that need to be deleted if loaded improperly.
- Decide whether to load data into a secondary database structure and then concatenate it with the primary database

To find recently updated documents, on the Search menu, click Search for edited documents. Reindex prior to importing the updated records so the search query only includes changes made to the database by the matching import.

For more information about the Overlay option for importing delimited text files, see Importing delimited text files.

 To load additional data into a database using the matching import process:

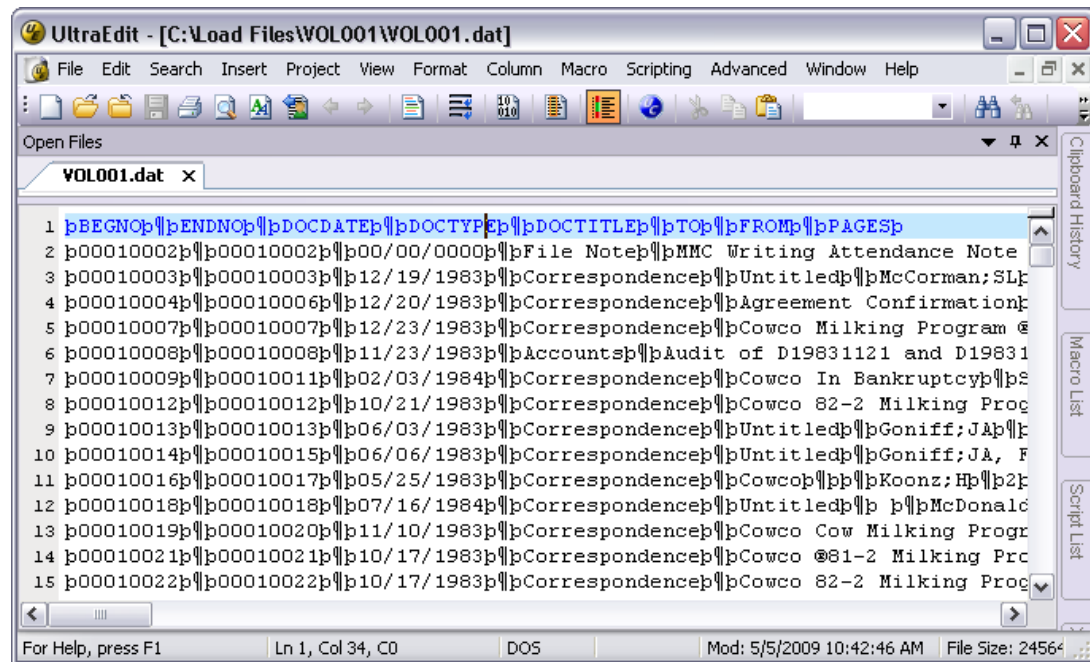
 Review and Edit Delimited Text Files:

Before importing a delimited text file into a Concordance database, review the delimited text file, and make any necessary corrections.

To review and edit a delimited text file:

1. Open the delimited text file in any text editor program.

Example of a delimited text file opened in UltraEdit:



2. Review the delimited text file for the following elements:

- The file must be a text-based format with an extension of .dat, .csv, .txt, .rtf, or any normal text file extension.
- If there is no a header row containing field names, open the associated .tif file for the first record and match the data in the record to the data in the .tif file.
- Note the delimiters used in the file. Concordance can handle any standard text delimiters.
- Note the date format used in the file. Concordance can load dates containing slashes in any order with either 2- or 4-digit years, with a maximum of 8 digits. The only date formats Concordance can load without slashes is the universal date format of YYYYMMDD and the mm-dd-yyyy date format with dashes.
- Is there a carriage return at the end of the record? If not, add a carriage return at the end of the record. Concordance will not load the last record if the carriage return at the end of the record is missing.

3. Make the necessary edits, if applicable.

4. Save the file.

5. Either print a copy of this file or leave the text editor program open so you can reference the field order when importing the files.

Create a Duplicate Database:

After reviewing the delimited text files, you need to create a copy of the database you want to add the additional text files. You will duplicate the database by exporting the database's structure.

To create a duplicate database:

1. In Concordance, open the database you want to copy.
2. On the **Documents** menu, point to **Export**, and click **Structure**.
3. Clicking **Structure** opens the **Copy Structure** dialog box.
4. Navigate to where you want to save the duplicate database, type the name of the database file in the **File name** field, and click **Save**.

Load the Delimited Text Files

After creating a copy of the original database, you need to import the delimited text files into the duplicate database. You can use the Import Wizard or the Import dialog box to import the delimited text files.

To import a delimited text file using the Import Wizard:

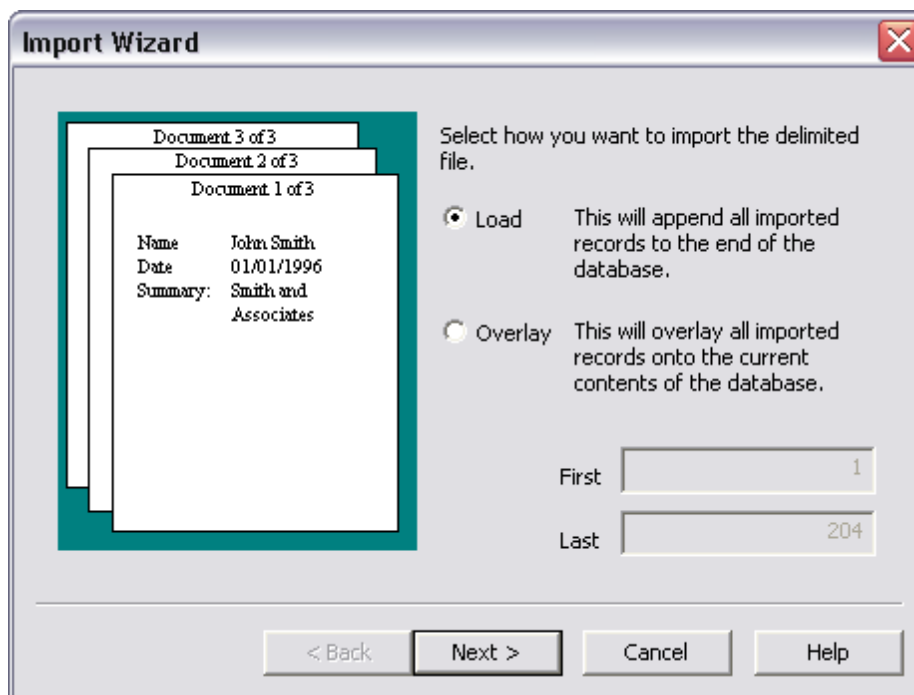
1. In Concordance, open the duplicate database.
2. On the **Documents** menu, point to **Import**, and then click **Delimited text**.

Clicking Delimited text opens the Import dialog box.

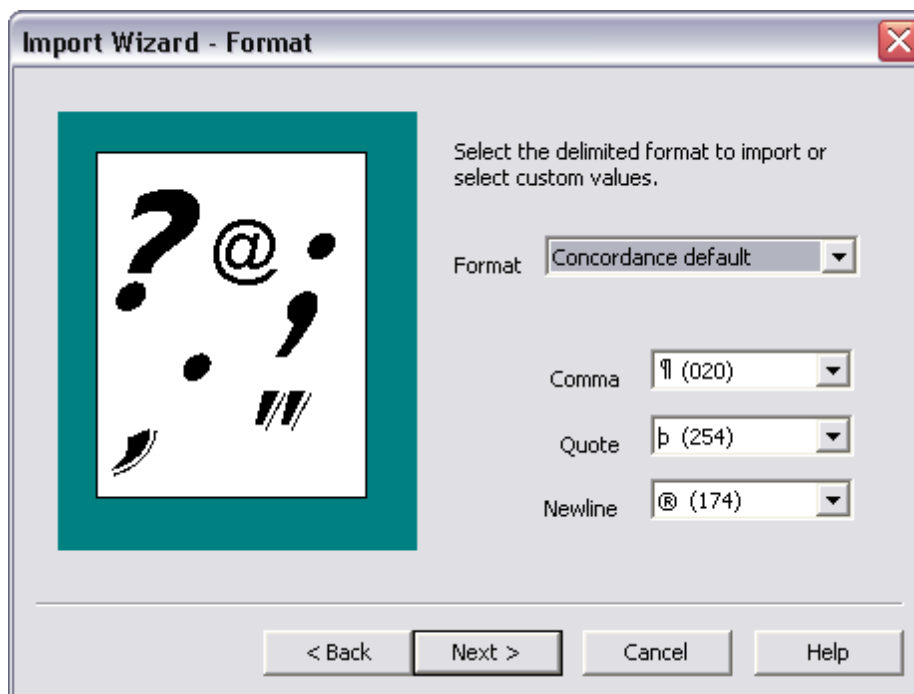


3. Select **Import/Overlay Wizard** and click **OK**.

Clicking OK opens the Import Wizard dialog box.



4. Click **Load**.
5. Click **Next** to open the **Import Wizard - Format** dialog box.



Concordance is a full-text database manager. Its documents are likely to contain

text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Format field defaults to Concordance default.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

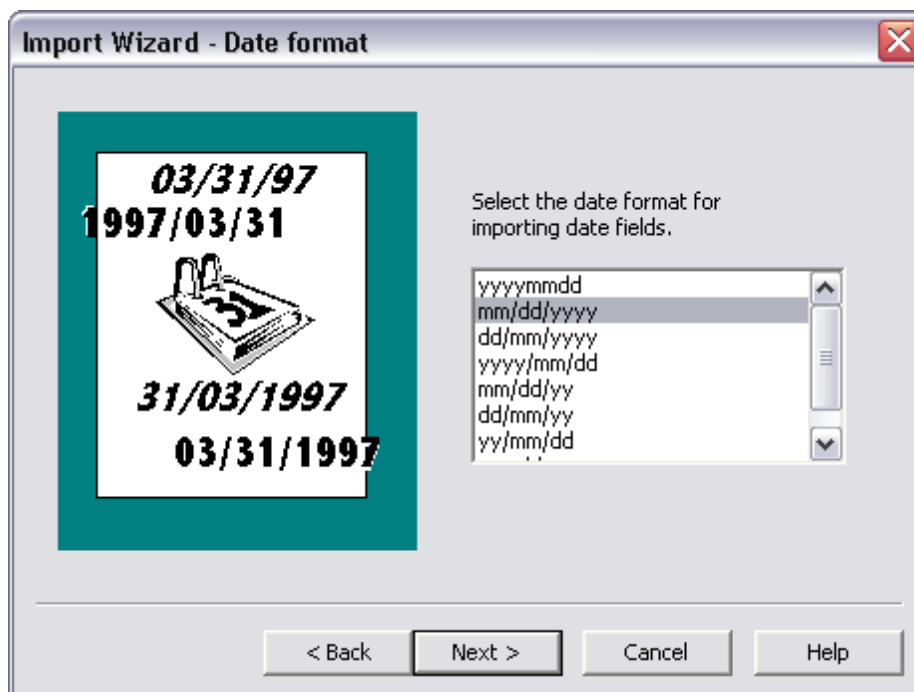
The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

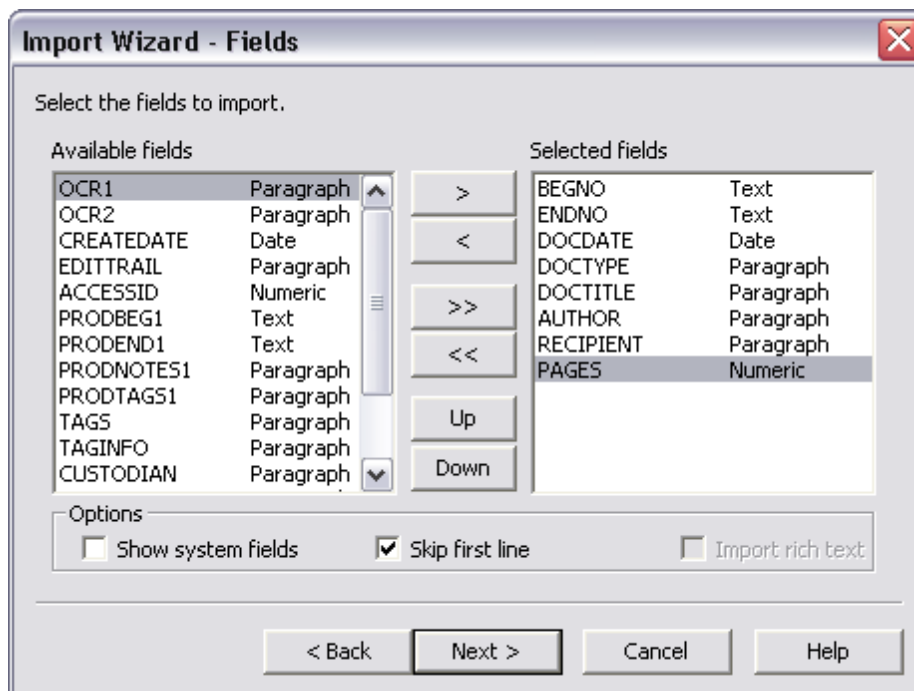
The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

6. Click **Next** to open the **Import Wizard - Date Format** dialog box.



7. Select the date format that matches the delimited text file.
8. Click **Next** to open the **Import Wizard - Fields** dialog box.



8. Click the double arrow (<<) button to move all the fields to the **Available fields** list.
9. In the **Available fields** list, select the fields you want to include in the import, and click the right arrow (>) button to add the fields to the **Selected fields** list.
10. Once you have added the applicable fields to the **Selected fields** list, use the **Up** and **Down** buttons to make the field order match the field order of your delimited text file.
11. The field order in the **Selected fields** list, must match the field order of your delimited text file.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance properly.

12. To display hidden system fields, select the **Show system fields** check box.

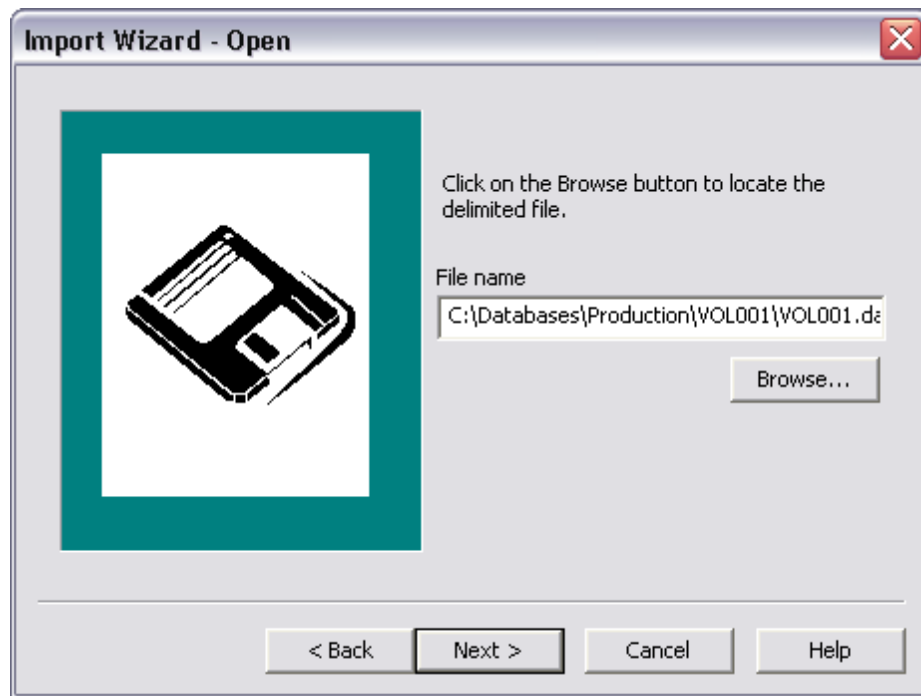
System fields are fields used by Concordance to administer database functions, such as replication. They are generally not visible, but you can display and import them if you select the Show system fields check box.

13. To prevent Concordance from creating a record for your field name row, select the **Skip first line** check box, and then click **Next**.

Sometimes the first line of a data file contains a list of the field names in the database, with each field name taking the place of the data for that record. When you select the Skip first line check box, Concordance ignores that line of data during the import.

Full-text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. Delimited text files with rich text are automatically recognized by the Import Wizard. Concordance automatically selects the Import rich text check box when applicable.

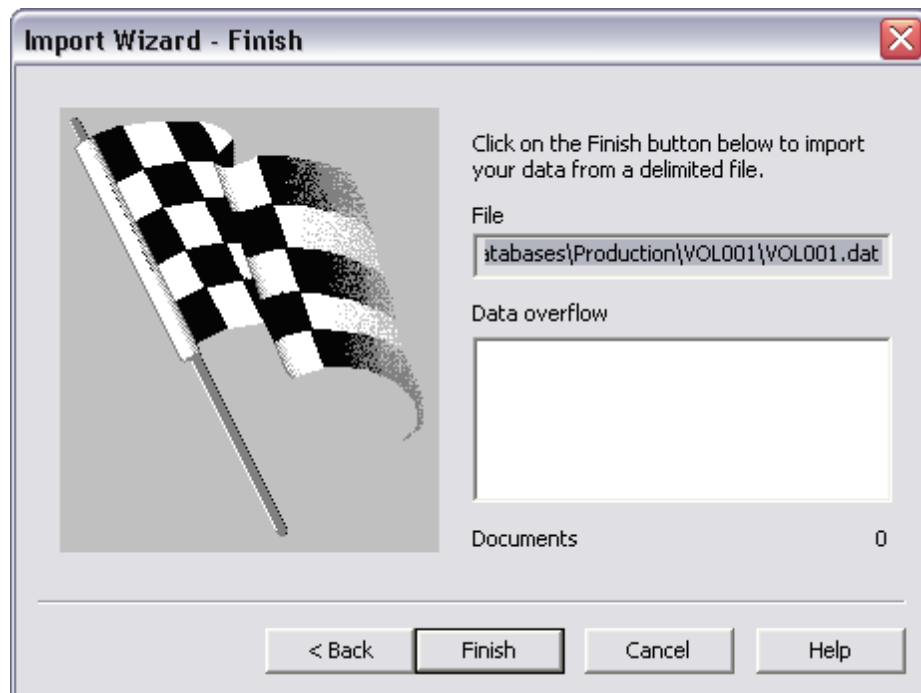
14. Click **Next** to open the **Import Wizard - Open** dialog box.



15. Click the **Browse** button, navigate to and open the delimited text file you want to import into the database.

The delimited text file's path and file name is displayed in the File name field.

16. Click **Next** to open the **Import Wizard – Finish** dialog box.



17. Click **Finish** to import or overlay the delimited text file.
18. When the delimited text file is imported, the number of documents that successfully loaded is displayed in the **Documents** field. Verify that your record numbers match.

If there is any data overflow during the import, the Data overflow field displays the line numbers on which the overflow errors occurred in the delimited text file.

 To import a delimited text file using the Import dialog box:

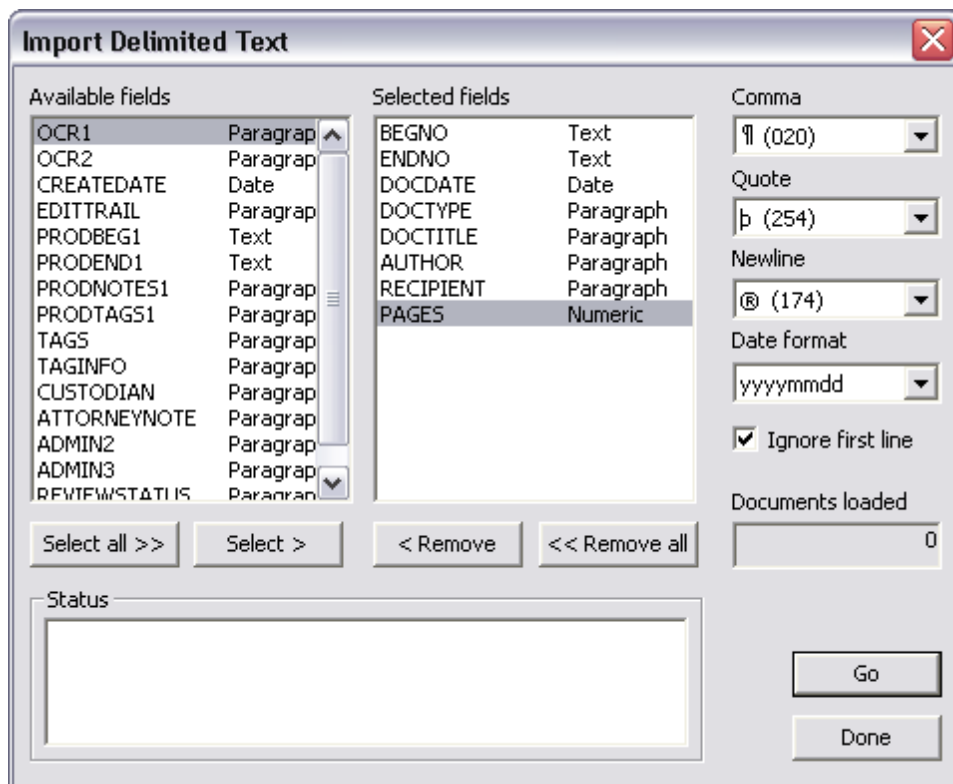
1. In Concordance, open the duplicate database.
2. On the **Documents** menu, point to **Import**, and then click **Delimited text**.

Clicking Delimited text opens the Import dialog box.



3. Select **Import dialog box** and click **OK**.

Clicking OK opens the Import Delimited Text dialog box.



4. Click the **<<Remove all** button to move all fields to the **Available fields** list.
5. In the **Available fields** list, select the fields you want to include in the import, and click the **Select** button to add the fields to the **Selected fields** list.

The fields and field order in the Selected fields list, must match the fields and field order of your delimited text file.

Print a one-page copy of your delimited text file so you can reference your header row while determining the field order during the import.

If the field structure that you enter in Selected fields list does not match the field structure of your delimited text files, the data won't transfer into Concordance properly.

To remove a field from the Selected fields list, select the field and click the Remove button.

Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line	174

Concordance Default Delimiters

Delimiter Character	Function	Numeric Value

feed.

The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

6. In the **Date format** field, select the date format that matches your delimited text file.

Sometimes the first line of a data file contains a list of the field names in the database, with each field name taking the place of the data for that record.

7. Select the **Ignore first line** check box if the first row in your delimited text file is a field name row, and you want Concordance to ignore the field name row during the import.

Clear the check box if you want Concordance to create a record for the first line of your delimited text file.

6. Click the **Go** button to open the **Load delimited file** dialog box.

7. Navigate to and open the delimited text file you want to import into the database.

When the delimited text file is imported, the number of documents that successfully loaded is displayed in the Documents loaded field. Verify that your record numbers match.

If there is any data overflow during the import, the Status field displays the line numbers on which the overflow errors occurred in the delimited text file.

8. Click the **Done** button to close the **Import Delimited Text** dialog box.

Verify the Metadata

After importing a delimited text file into the duplicate database, verify your imported delimited text files in Concordance and index the database.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

To verify your imported delimited text files:

1. On the **Standard** toolbar, click the **Table** button to open the **Table** view.
2. Verify the imported records are in the record listing.
3. On the **Standard** toolbar, click the **Browse** button to open the **Browse** view.
4. On the **Tools** menu, click **Empties**.

The Empties command determines whether empty fields are displayed in the Browse view. By default, Concordance does not display or print empty fields.

When you click the Empties command a check mark is displayed next to the Empties command and all fields in your database, including those not populated yet are displayed in the Browse view. Verify the field data you imported is populated with the correct data.

To only display populated fields, click the Empties command again. When the check mark is not displayed next to the Empties command, only the populated fields are displayed in the Browse view.

5. After verifying the imported records, index the database.

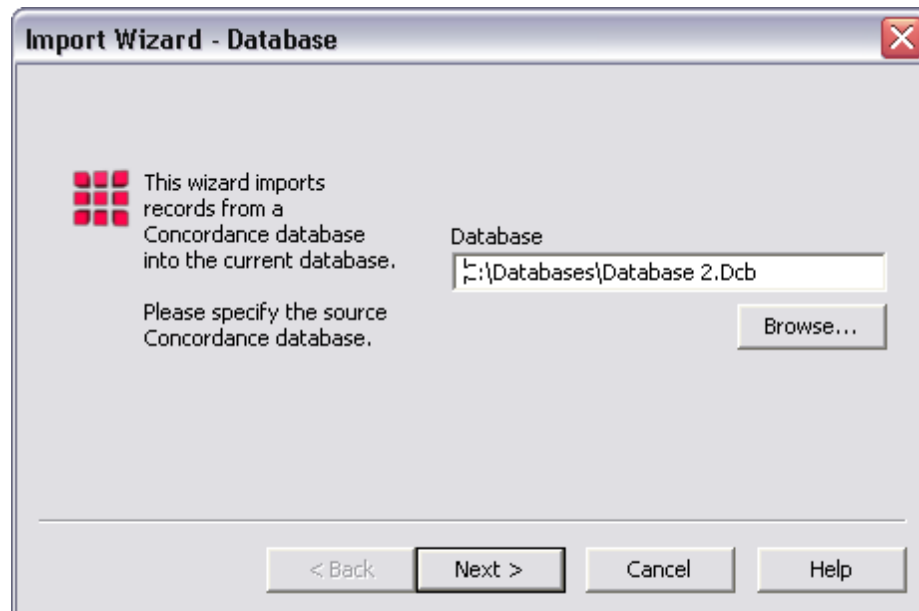
 Import the Duplicate Database

After the delimited text files are imported into the duplicate database and the metadata is verified, you are ready to import the duplicate database into the original database.

For more information about importing Concordance databases, see Importing Concordance databases.

To import the records from the duplicate database:

1. Open the original database in Concordance.
2. On the **Documents** menu, point to **Import**, and click **Concordance database**.
Clicking Concordance database opens the Import Wizard - Database dialog box.

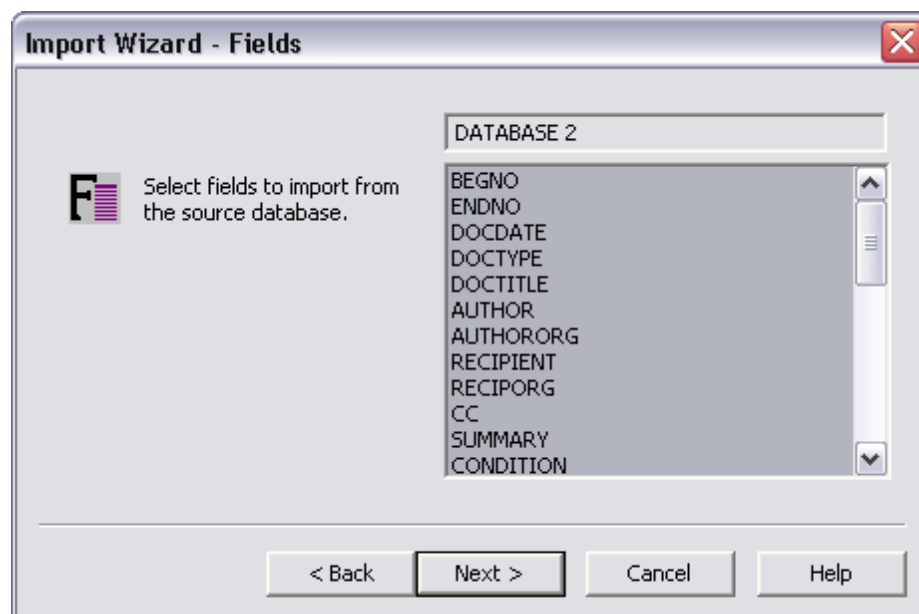


3. Click the **Browse** button to open the **Select database to merge** dialog box.
4. Navigate to and open the duplicate database's .dcb or .fyi file.

The duplicate database's path and file name is added to the Database field.

During the import, every record in the duplicate database is imported into the current database.

5. Click **Next** to open the **Import Wizard - Fields** dialog box.



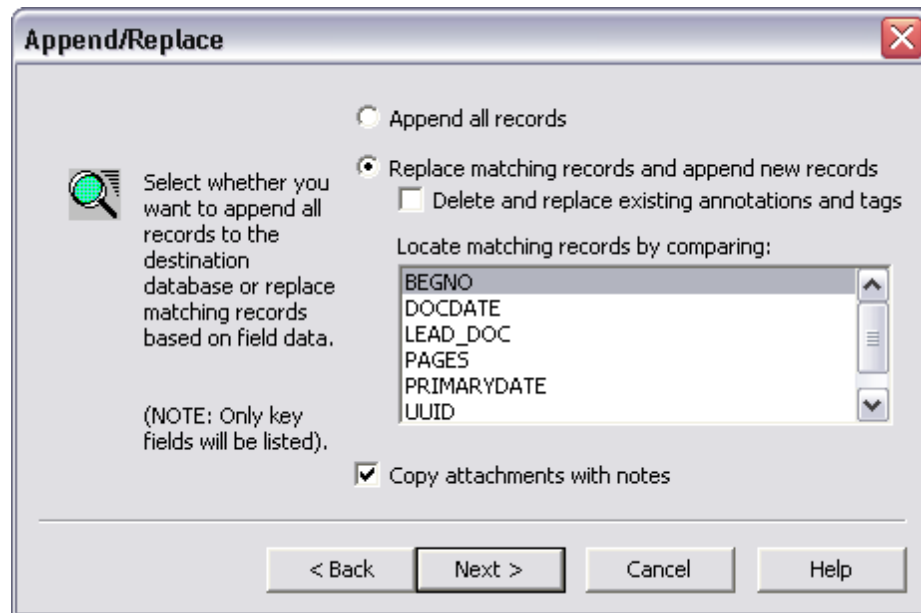
The field list in the Import Wizard - Fields dialog box displays the duplicate database's fields.

6. Click the fields you want to include in the import.

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

Data from the fields you select in the Import Wizard - Fields dialog box are only imported if the selected fields exist in both the original and duplicate databases.

7. Click **Next** to open the **Append/Replace** dialog box.



The Append/Replace dialog box allows you to control how documents are imported into the original database. The import can append each record, or it can look for a matching record and replace it. If the import does not find a match, it appends the record.

8. To have the import append all records, click the **Append all records** option.

When you select this option, the import adds all imported records as new records after the last record in the original database.

To have the import replace all matching records and append all new records, select the Replace matching records and append new records option.

9. Leave the **Delete and replace existing annotations and tags** check box blank.

The import uses the field selected in the Locate matching records by comparing field to determine exact record matches between the two databases. Only key fields are listed in the Locate matching records by comparing field.

Key fields are defined in the Modify dialog box. For more information about key fields, see Creating databases.

10. In the **Locate matching records by comparing** field, select the fields you want the

import to use to determine record matches.

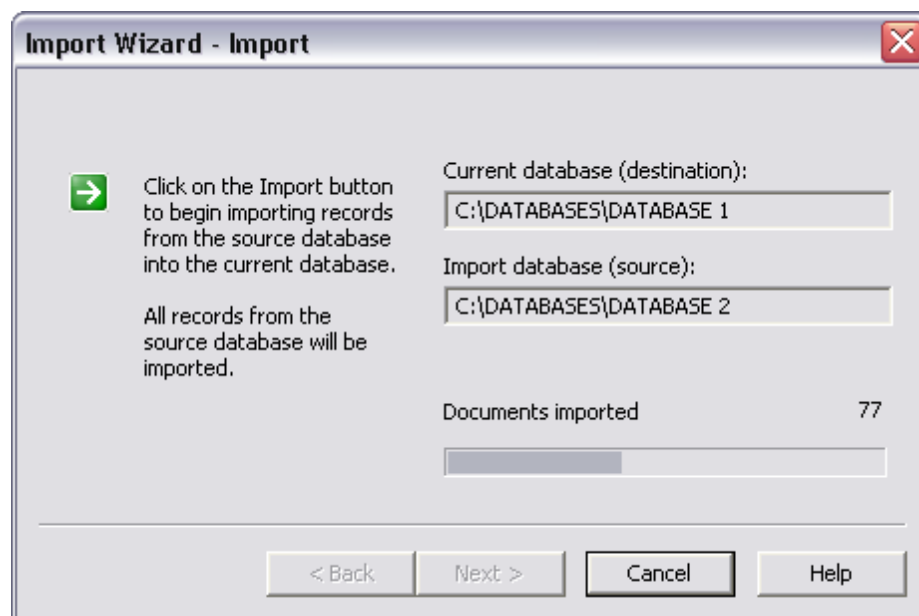
To select multiple fields, use SHIFT+click or CTRL+click.

Full-text paragraph fields are considered a match if the first sixty characters or the first line, whichever is less, match, regardless of the remaining contents of the field.

11. To copy a record's attachments with notes during the import, select the **Copy attachments with notes** check box.

To exclude a record's attachments with notes from the import, clear the Copy attachments with notes check box.

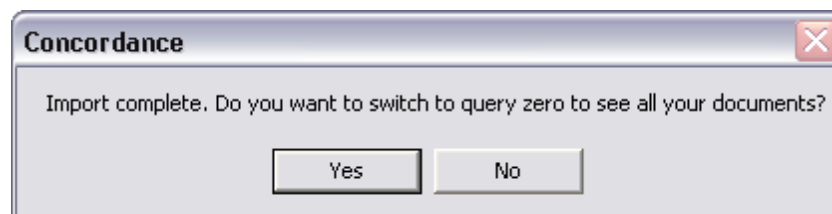
12. Click **Next** to open the **Import Wizard - Import** dialog box.



13. Click the **Import** button to start the import.

You can click the Cancel button at any time to cancel the process.

When the import finishes, the following message is displayed:



14. To run the Zero Query in the original (destination) database so that you can view all the database records, click **Yes**.

To close the message without running the Zero Query, click No.

For more information about the Zero Query, see Reviewing search queries.

Verify the New and/or Appended Records

After importing the records from the duplicate database into the original database, verify the new and/or modified records in the original database. Once you have verified the records were imported successfully into the original database, you need to reindex the original database.

For more information about indexing and reindexing databases, see Indexing and reindexing updates.

To verify your imported delimited text files:

1. Open the original database in Concordance.
2. On the **Search** menu, click **Search for edited documents**.

The search results are displayed in the Table view.

3. In the **Table** view, verify the imported records are in the record listing.

You can also verify the record edit date and time stamp for the updated and new records in the EDITTRAIL field, or its equivalent, in the Browse view.

4. After verifying the imported records, on the **File** menu, click **Reindex** to reindex the database.

About editing records

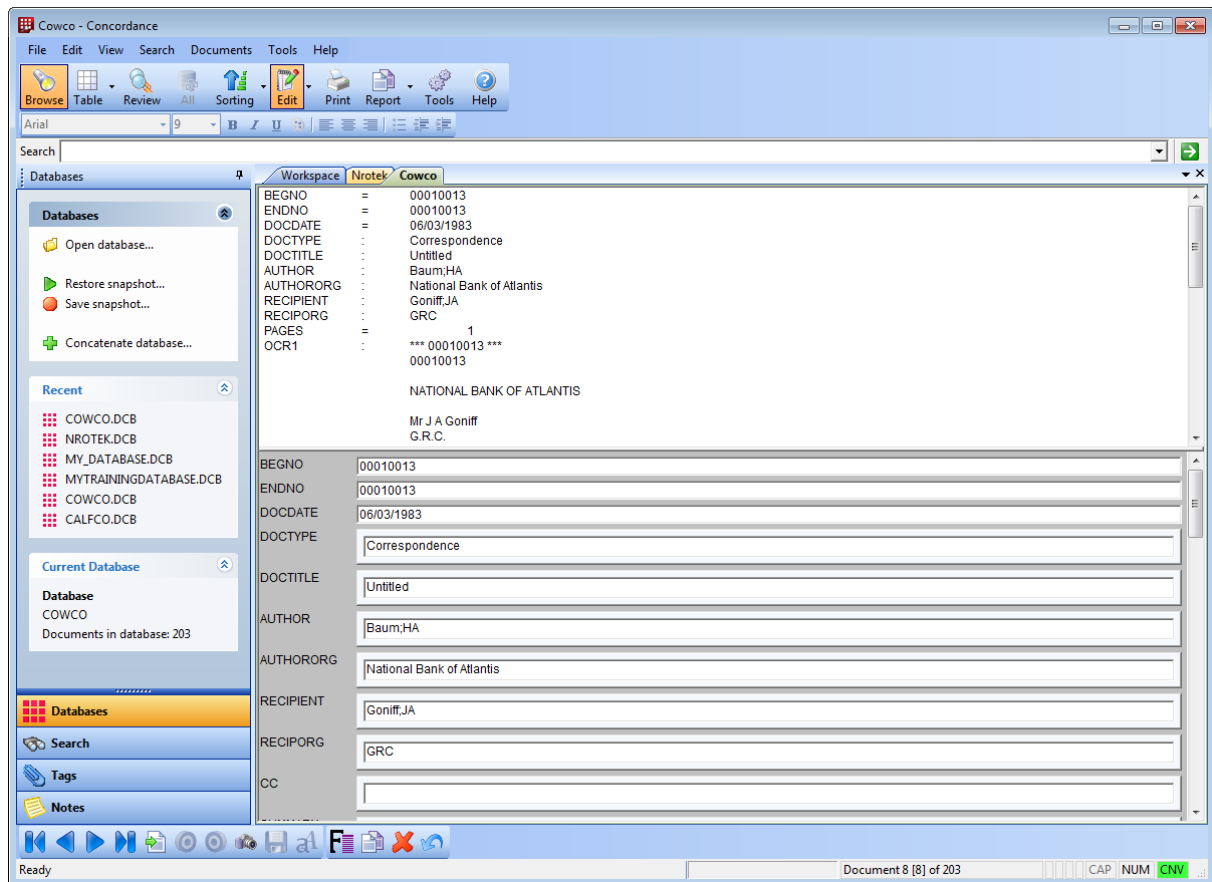
Concordance is fully equipped to handle a *rolling production environment* with features that allow editing and adding records as needed. Attorneys find the editing tool useful for adding comments directly to a document record during the case review. Administrators can add an Attorney Notes field to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

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

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 View

Edit tools

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

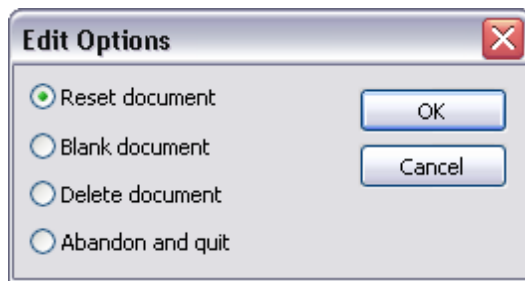


- **Fields** - accesses a field listing to insert data from another field
- **Ditto** - allows you to copy field data from another record
- **Delete/Undelete** - adds or removes a record for deletion
- **Edit Options** - allows you to choose reset, blank, delete, or abandon and quit a record

 The Ditto feature is not available for E-Documents databases created in or converted to a Concordance version 10.21 or later database.

Edit Options dialog box

Clicking the Edit Options 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

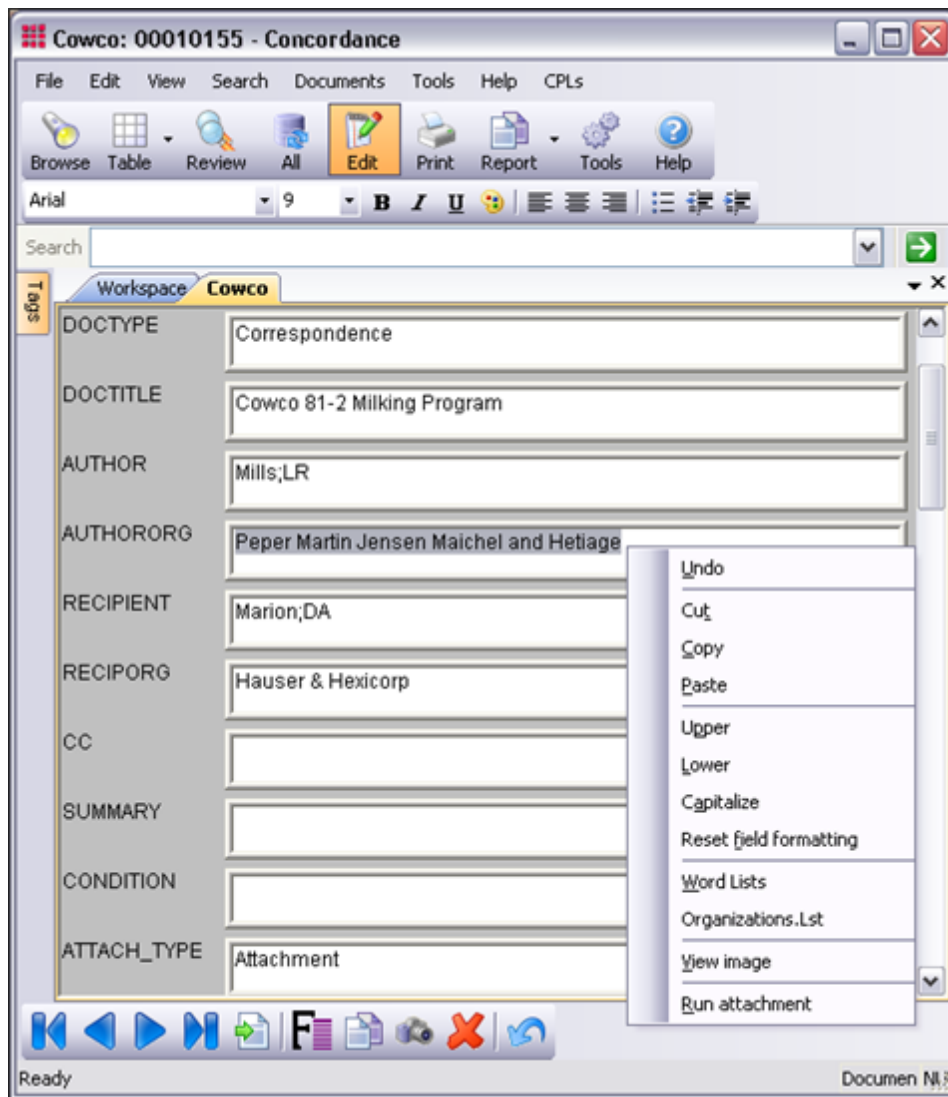
Rich Text Toolbar

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 has formatting options that can be applied to data within a specific field. These formatting options include: Upper case, Lower case, Capitalize, and Reset field formatting.



To change the format of existing data within a field:

1. In the **Edit** view, select the word or blocks of text that you want to format.
2. Right-click the text and click the applicable formatting option.

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

Editing records

Editing existing records is done most often when records are added to Concordance 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 administrator.

Each time you edit a record, any changes are saved when you navigate to another record or change your view in Concordance. 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.

Edit View

To edit an existing record:

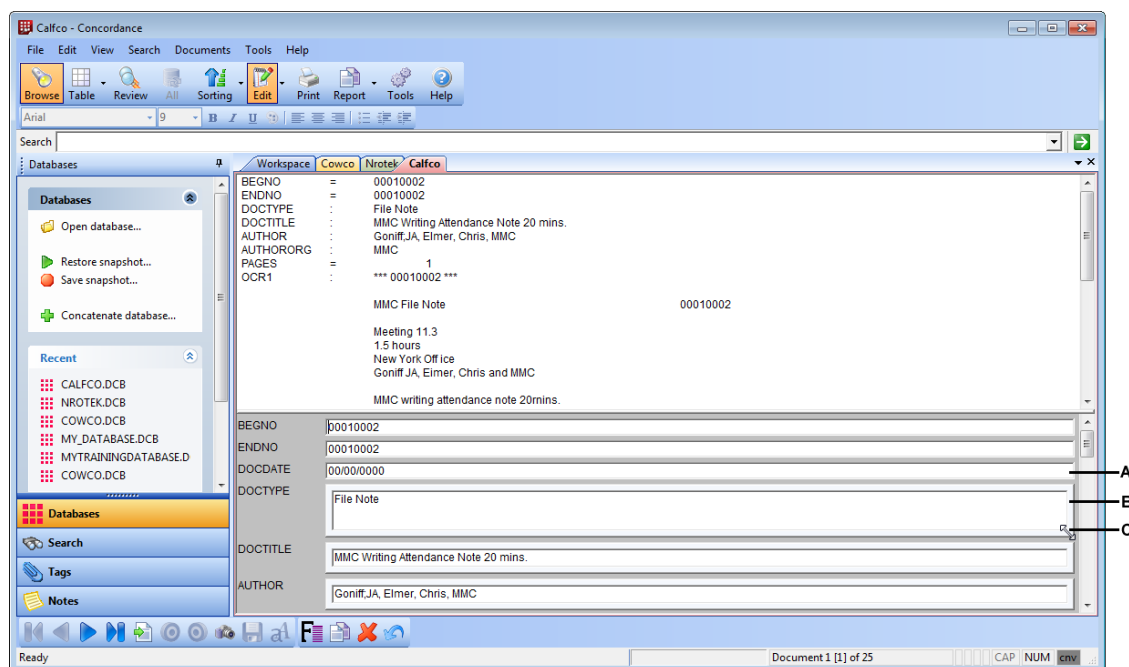
1. In the Browse or Table view, select the record .
2. On the Standard toolbar, click the **Edit** button to activate edit mode for the record.

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, point to **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 right corner 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.



A) Non-editable fields B) Editable Fields C) Drag handle to resize field

5. Make your edits.

Concordance automatically saves your edits as soon as you navigate to another record or change your view in Concordance.

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 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**.

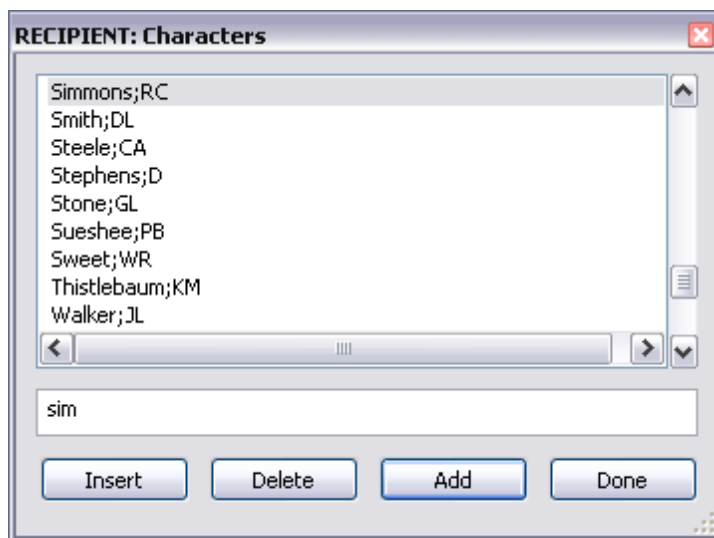
📁 Using Word Lists

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 *Wocjeweiski* 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 administrator. If you want a word list added to a particular field, contact your Concordance administrator.



There are numerous ways to open a word list in Concordance. 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, point to **Lists**, click **Word Lists**, 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, point to **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, point to **Lists**, click **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 automatically saves your edits as soon as you navigate to another record or change your view in Concordance.

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 administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

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

To add a new entry to a word list:

1. Open a word list.
2. Type the value you want to add to the list in the field below the word list.
3. Click the **Insert** button.

To delete a value from a word list:

1. Open a word list.
2. Select the value you want to delete from the word list.
3. Click the **Delete** button.

Removing rich text from multiple records

If rich text formatting has been applied to field data, you may need to change the rich text formatting in a field to plain text to save space or remove certain text formatting that affects the precision of hit highlighting when searching in Concordance.

If you need to remove rich text formatting from a field in multiple records in the database, administrators can use the Bulk Field Format Reset feature. When you use the Bulk Field Format Reset feature, Concordance removes all rich text formatting in the selected field and changes the text in the field to plain text in all records in the database.

If you only need to remove rich text formatting from a field in individual records, you can use the Reset Field Formatting function in the Edit view. For more information about removing rich text formatting in the Edit view, see Formatting field text.

 When using the Bulk Field Format Reset, make sure that no other users are in the database at the time.

■ **To reset the rich text format to plain text for multiple records:**

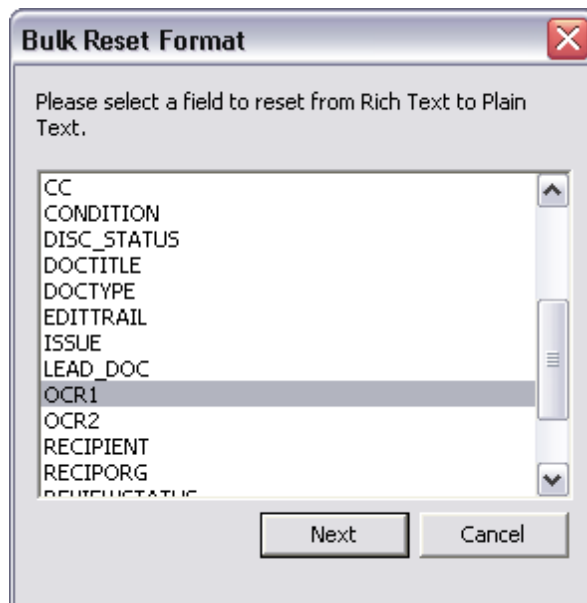
1. On the **File** menu, point to **Administration**, and click **Bulk Field Format Reset**.

Clicking Bulk Field Format Reset opens the Administration dialog box.



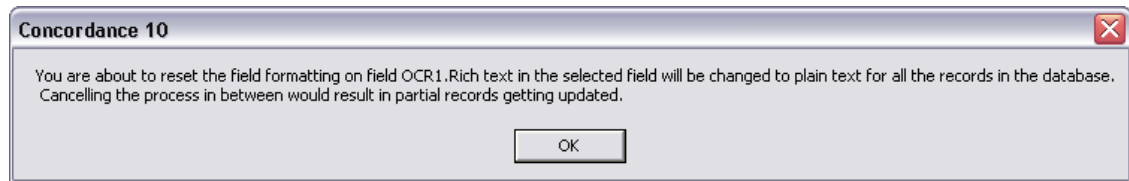
2. In the **User** field, type the administrator's user ID.
3. In the **Password** field, type the administrator's password.
4. Click **OK**.

Clicking OK opens the Bulk Reset format dialog box.



5. In the field list, click the field containing the rich text formatting that you want to change to plain text.
6. Click **Next**.

Clicking Next opens the following message:



7. Click **OK**.

If there is rich text formatting in the field, clicking OK removes all rich text formatting in the selected field and changes the text in the field to plain text in all records in the database.

If Concordance does not find any rich text formatting in the field, clicking OK opens the *Selected field does not contain RTF text* message. Click OK to close the message, and click Cancel to close the Bulk Reset format dialog box.

After running Bulk Field Format Reset, the changes are immediately viewable in Concordance and all single byte and Unicode character sets are retained; however you need to reindex your database to see the red search hit highlighting again during searches.

 To ensure that your edits are searchable in a timely manner, coordinate with your Concordance 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.

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

Creating new records

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

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

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

For more information about creating new records using the Ditto function, see Using Ditto.

The screenshot shows a software window titled 'Workspace Cowco'. Inside, there is a form with several input fields. The fields are labeled on the left: BEGNO, ENDNO, DOCDATE, DOCTYPE, DOCTITLE, AUTHOR, AUTHORORG, RECIPIENT, RECIPORG, CC, and SUMMARY. The DOCDATE field contains the text '00/00/0000'. The other fields are empty. A vertical scrollbar is on the right side of the form.

- ☑ The Append and Ditto features are not available for E-Documents databases created in or converted to a Concordance version 10.21 or later database.

To create a new blank record:

1. In the **Edit** view, on the **Edit** menu, click **Append** to open an empty record form.

Some fields may be gray because you do not have permission to edit these fields.

2. Fill out the applicable fields for the record.

You can scroll or use the TAB, up arrow, or down arrow keys to navigate between fields.

For more information about the record text editing options available in Concordance, see Navigating Concordance.

For more information about filling out fields using word lists, see Editing records.

Some fields are distinguished by having a raised border and can be resized during data entry to make editing easier. To resize a field in the Edit view, click the bottom right corner of the field and drag it down the page to expand the field size.

3. On the **Standard** toolbar, click the **Edit** button to turn off edit mode and save your record.

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

Changes are immediately viewable. However, in order to search 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 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.

4. To reindex the database, on the **File** menu, click **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 – to ensure that all new records have been saved. If you do not close the Edit view before exiting, you may lose your work.

Using Ditto

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

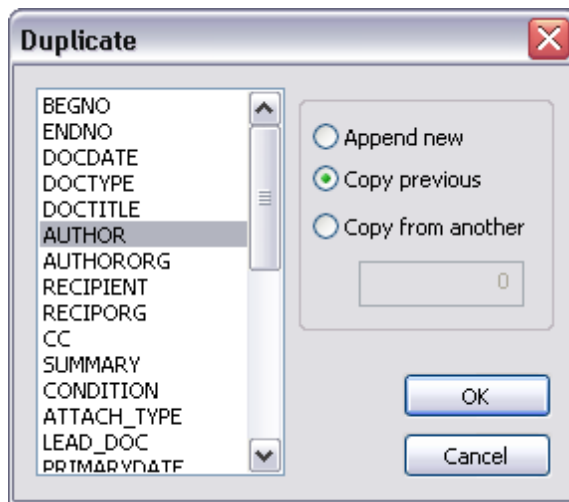
 The Ditto feature is not available in Concordance version 10.21 or later.

The Duplicate dialog box offers the following options:

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

 If you are copying field data from 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 create a new record with data from another document:

1. In the **Browse** or **Table** view, select the record containing the field data you want to use in the new 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:
 - On the **Edit** menu, click **Ditto (Edit View)**.
 - On the **Dynamic** toolbar click the **Ditto** button.
4. From the field list, select the fields containing the data you want to copy to the new record.

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

5. Click the **Append new** option and click **OK**.

Clicking OK creates a new record containing the selected field data from the record you opened in the Browse or Table view.

6. Fill out the applicable fields for the record.

Some fields may be gray because you don't have permission to edit these fields.

You can scroll or use the TAB, up arrow, or down arrow keys to navigate between fields.

For more information about the record text editing options available in Concordance, see Navigating Concordance.

For more information about filling out fields using word lists, see Editing records.

Some fields are distinguished by having a raised border and can be resized during data entry to make editing easier. To resize a field in the Edit view, click the bottom

right corner of the field and drag it down the page to expand the field size.

7. On the **Standard** toolbar, click the **Edit** button to turn off edit mode and save your record.

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

Changes are immediately viewable. However, in order to run full-text searches for data 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 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.

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

To populate fields using Ditto:

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:
 - On the **Edit** menu, click **Ditto (Edit View)**.
 - On the **Dynamic** toolbar click the **Ditto** button.
4. 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.

5. 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.
6. Click **OK**.

Clicking OK copies the data from the selected fields in the other document to the fields in the current document.

7. On the **Standard** toolbar, click the **Edit** button to turn off edit mode and save your record.

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

Changes are immediately viewable. 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 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.

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

Splitting and joining records

It may be necessary sometimes to split or join records that were not unitized properly at scan time. For example, you might have a record containing one document that should have actually been unitized as two documents. Conversely, you might have a document split over two records that should have been one document contained in one record.

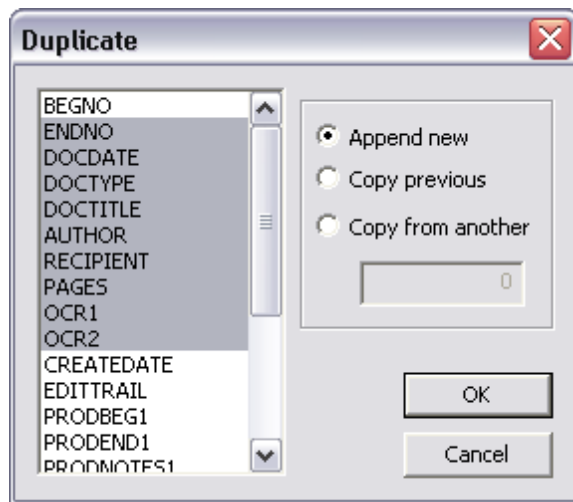
Correcting document boundaries in Concordance and Concordance Image is a manual process requiring several steps. It is important to proceed carefully to ensure that all of the data is corrected appropriately, so there is no data loss. It is recommended that you back up the database and imagebase prior to splitting or joining documents.

 We recommend working with single-page TIFF files to simplify adjusting document breaks. If your images are multi-page TIFF files, they will need to be reprocessed in order to have the proper document breaks.

To split documents in Concordance:

1. In the **Browse** or **Table** view, open the record that you want to split into multiple records.
2. On the **Standard** toolbar, click the **Edit** button to open the record in edit mode in the **Edit** view.
3. To open the **Duplicate** dialog box, do one of the following:
 - On the **Edit** menu, click **Ditto (Edit View)**.
 - On the **Dynamic** toolbar click the **Ditto** button.
4. Select the fields containing the data you want to duplicate into the split document.

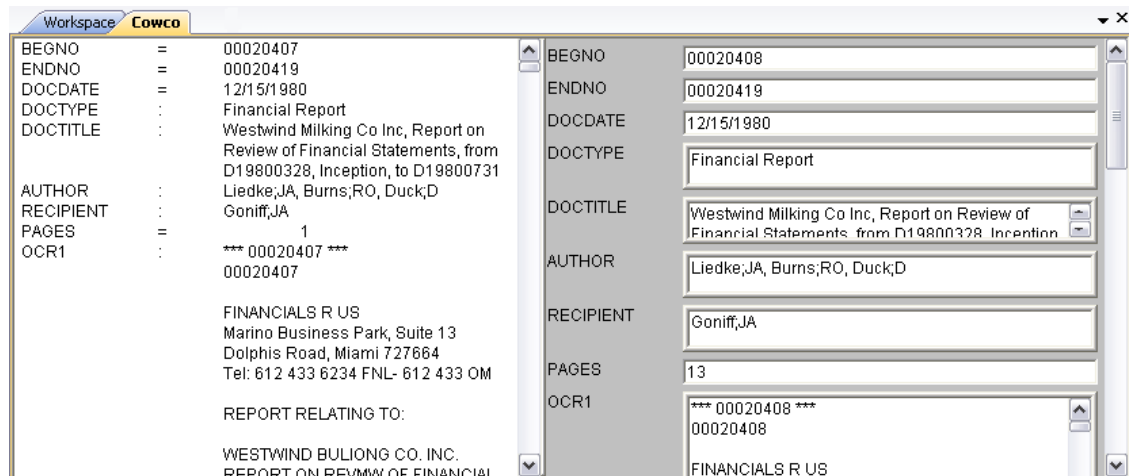
You can select multiple fields by pressing the SHIFT or CTRL key while selecting multiple fields.



5. Click the **Append new** option and click **OK**.

Clicking OK creates a new record containing the selected field data from the record you opened in the Browse or Table view.

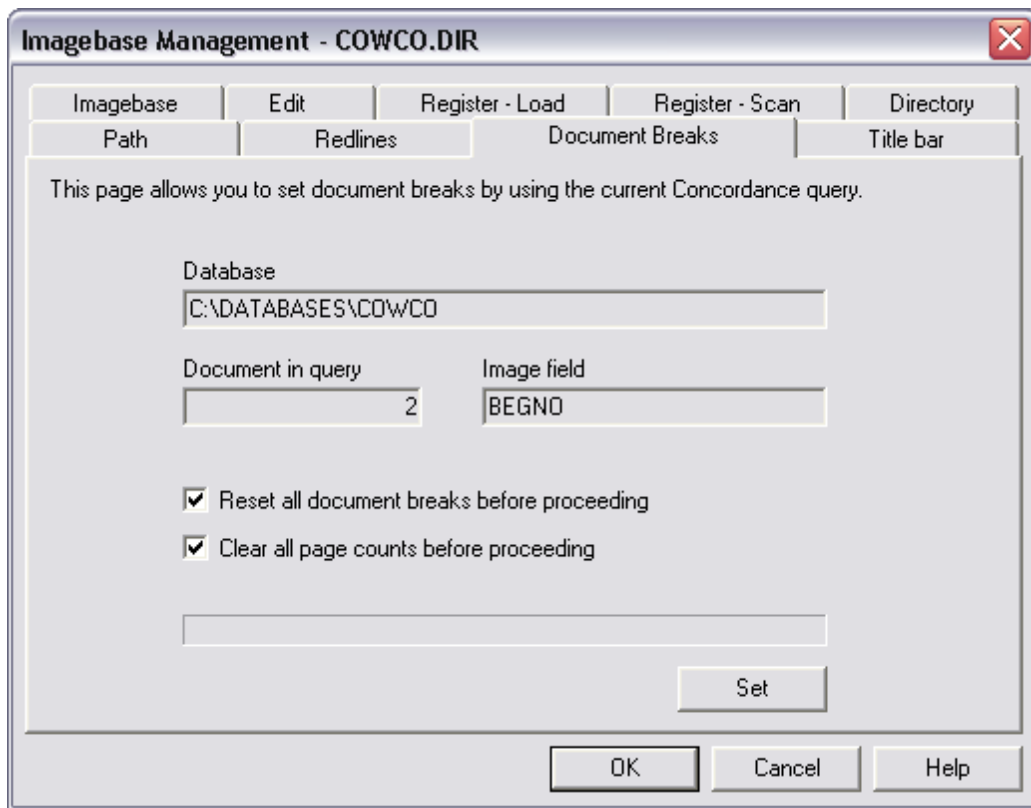
The new document is displayed with the selected field data in the Edit view while the Browse view continues to display the original document.



6. Make the necessary edits to the data in the new record. For example, the **BEGNO**, **PAGES**, and **OCR** fields or their equivalents may need to be modified to reflect the document split.
7. Click the **Edit** button to save the changes to the new record.
8. Navigate to the original document, and click the **Edit** button to open the original document in the **Edit** view.
9. Make the necessary edits to the data in the original record. For example, the **ENDNO**, **PAGES**, and **OCR** fields or their equivalents may need to be modified to reflect the document split.
10. Click the **Edit** button to save the changes to the original record.

 To split document images in Concordance Image

1. In Concordance, run a query to isolate the records that need to be adjusted.
2. On the **Dynamic** toolbar, click the **View image** (camera) button to open the corresponding images in Concordance Image.
3. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.
4. Navigate to and open the database's .dir file, located in the same directory as the database's .dcb file.
5. Click the **Document Breaks** tab.



The screenshot shows the 'Imagebase Management - COWCO.DIR' dialog box with the 'Document Breaks' tab selected. The dialog has a title bar with a close button (X). Below the title bar are five tabs: 'Imagebase', 'Edit', 'Register - Load', 'Register - Scan', and 'Directory'. The 'Document Breaks' tab is active, showing a 'Path' field with 'C:\DATABASES\COWCO' and a 'Redlines' field with '2'. Below these are two checkboxes: 'Reset all document breaks before proceeding' and 'Clear all page counts before proceeding', both of which are checked. At the bottom right is a 'Set' button. The dialog also has 'OK', 'Cancel', and 'Help' buttons at the very bottom.

The Document Breaks tab allows you to set document breaks in the imagebase, based on the current query in Concordance.

The number displayed in the Document in query field should match the number of documents in the query you ran in Concordance.

6. To have Concordance Image reset all document breaks for the documents in the current query, select the **Reset all document breaks** check box.

When the Reset all document breaks check box is selected, Concordance Image checks to see if the image alias values match the values of the Concordance field in the Image field. If the image alias and Concordance fields values match, Concordance Image sets the document break at the image alias value.

For example, if the image alias is 00010002 and the Concordance field value is 00010002, the document break is at the 00010002 image alias value.

If the values do not match, Concordance Image will not create a document break at the image alias value.

7. To have Concordance Image reset all page counts for the documents in the current query, select the **Clear all page counts** check box.

When the Clear all page counts check box is selected, Concordance Image clears the existing page counts, and resets the page counts based on the new document breaks.

Concordance Image resets all document breaks and clears all page counts before creating any document breaks.

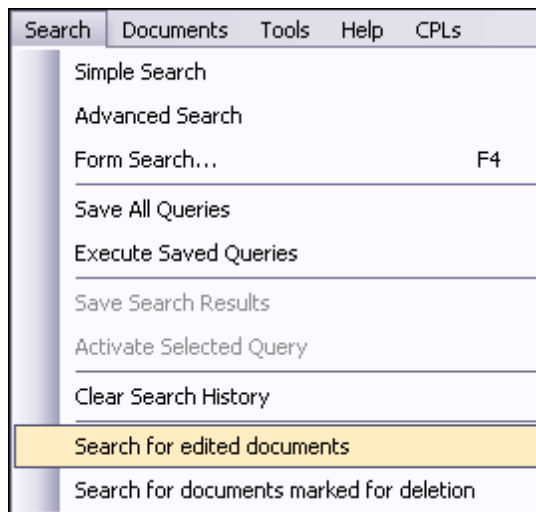
8. Click the **Set** button to create the document breaks in Concordance Image.
9. Click **OK** to close the **Imagebase Management** dialog box.
10. Close and reopen Concordance Image to view the adjusted document breaks.

Notice that the Concordance Image Status bar now links the proper images to the corresponding new records.

-  Document breaks in Concordance Image can also be changed manually for each individual image on the Edit tab in the Imagebase Management dialog box.

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.



Adding field groups to the .INI file

You or reviewers may want to search across multiple data fields at the same time without having to construct a long search query.

Writing field groups directly to an .ini file allows you to use an alias name to search across multiple fields at the same time without having to construct a long search query.

Example: Aliasname = fieldname1, fieldname2

ALLDATES = DATE, DOCDATE

By creating an alias field named ALLDATES and associating it with all various date fields from a concatenated database set, users can search all date fields without having to modify date field names in each database. You can also create a field group for data fields in a non-concatenated database.

- ✍ The CREATEDATE and CREATIONDATE fields, or their equivalents, cannot be included in a field group because of the validation settings applied to them.
- ✍ Field groups written directly into an .ini file will also save into a Concordance database template.

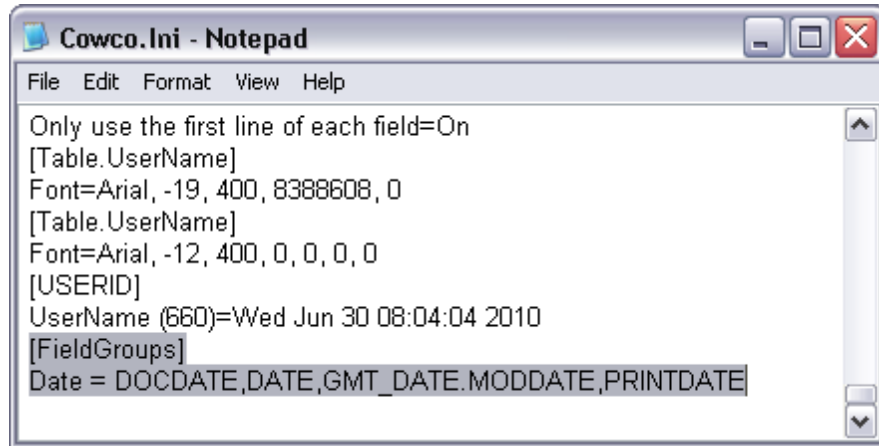
To add a field group to the .ini file:

1. In Microsoft Windows Explorer, navigate to the database .ini file you want to add a field group.

The .ini file is stored in the same directory as the database's .dcb file.

2. Right-click and open the .ini file in any text editor program.
3. Scroll to the bottom of the file.
4. In the next line after the last record, type **[FieldGroups]** and press Enter.
5. Type the Aliasname = fieldname1, fieldname2, fieldname3.

For example: Date = DOCDATE,DATE,GMT_DATE,MODDATE,PRINTDATE



You can add as many fields as you need to the field group.

6. Save the .ini file.
7. To test the field group you created, in Concordance, run a search for the field group alias you created.

For example: Date = ??/??/1982, ??/??/2000.

Your search results should include the applicable data from the fields within the field group you created.

To use a field group for concatenated databases, add the same field group to the other databases in the concatenated database set. When you search the concatenated database set, Concordance searches the all the fields in the field group in each of the databases in the concatenated set.

Creating authority word lists

Authority word lists are lists of words and phrases that open in the Edit view when you place your cursor in a field associated with a word list or right-click a field and click the list in the shortcut menu. Typing text automatically scrolls the list to the word or phrase nearest in spelling. Most words and phrases are retrieved with just a few keystrokes. Authority list entries are always inserted at the current cursor location in the Edit view.

An authority list can contain anything, including zip codes, author's names, and complex chemical names. Any data entry task that is repetitive and prone to errors is a good candidate for an authority list. Selecting entries from the list lowers the number of errors introduced through data entry, and the number of keystrokes — thus saving labor and expense while improving accuracy.

Authority lists are special files, similar to the database dictionary, which provide fast retrieval and maintenance of alphabetized entries. The authority lists used in Edit view have the .lst file extension.

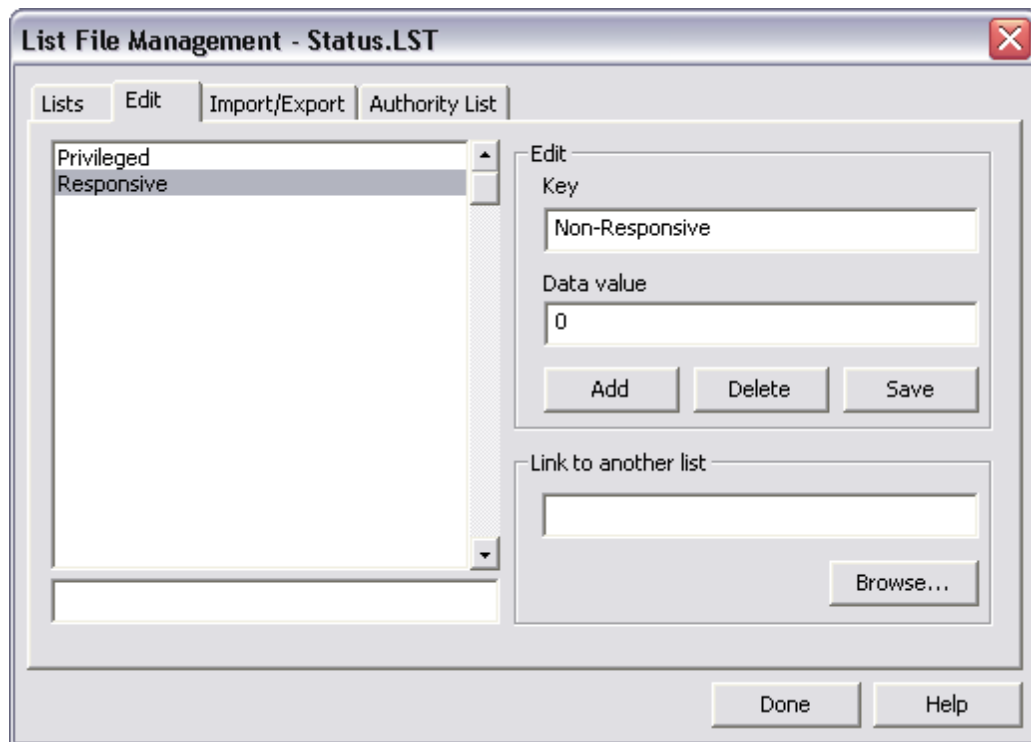
Authority lists are created in the List File Management dialog box. Once an authority list is created, the list is assigned to a field or fields in the Data Entry Attributes dialog box.

You can create authority list values in three ways:

- Manually create list values
- Import existing values from a database field
- Import values from an ASCII file

 To manually create an authority list:

1. On the **Tools** menu, click **Manage List Files**.
2. In the **List File Management** dialog box, click the **Lists** tab, click the **New** button.
Clicking the New button opens the *Allow duplicates in new list file?* message.
3. To allow duplicate values in the authority list, click **Yes**.
If you do not want to allow duplicate values, click No.
Clicking Yes or No opens the *Create a case sensitive list file?* message.
4. To set the authority list to be case sensitive, click **Yes**.
If you want the authority list to not be case sensitive, click No.
Clicking Yes or No opens the Save As dialog box.
5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.
Clicking Save opens the new authority list in the List File Management dialog box.
6. Click the **Edit** tab.



7. In the **Key** field, type the first list value.

The Key field is case sensitive and allows up to 240 alpha-numeric characters.

The Data value field is not used when creating an authority list. Leave the default 0 value in the Data value field.

8. Click the **Add** button to add the new list value.
9. Repeat steps 7 and 8 for each list value.
10. When you have finished creating the authority list, click the **Done** button to save your new list.

To create an authority list from field data:

1. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. On the **Lists** tab, click the **New** button.

Clicking the New button opens the *Allow duplicates in new list file?* message.

3. To allow duplicate values in the authority list, click **Yes**.

If you do not want to allow duplicate values, click No.

Clicking Yes or No opens the *Create a case sensitive list file?* message.

4. To set the authority list to be case sensitive, click **Yes**.

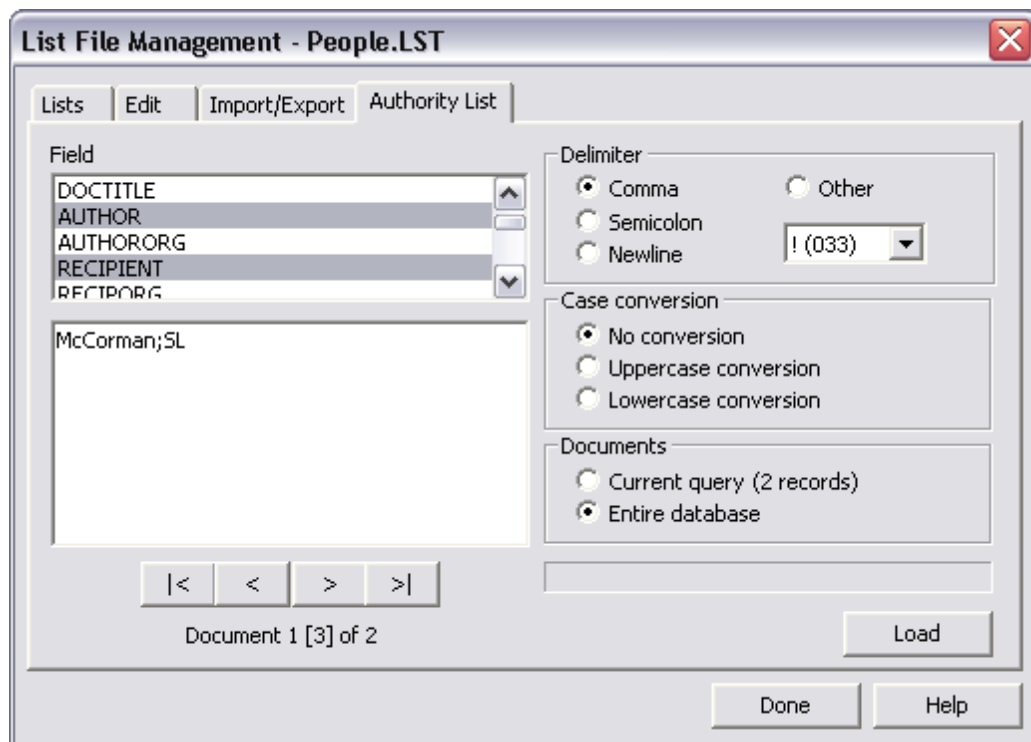
If you want the authority list to not be case sensitive, click No.

Clicking Yes or No opens the Save As dialog box.

5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.

Clicking Save opens the new authority list in the List File Management dialog box.

6. Click the **Authority List** tab.



7. In the **Field** list, click the fields containing the values you want to use for your authority list.

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

The Delimiter section determines which delimiter is used to separate the list values from each other in the authority list's .LST file. The Delimiter section defaults to Comma. If each value needs to be on a new line by itself, select the Newline option.

For more information about delimiters, see About delimiter characters.

8. In the **Delimiter** section, select the delimiter option you want to use in the .lst file.

The Case conversion section determines whether or not Concordance converts the text of the value selected in the authority list to all upper case or lower case characters in the Concordance field. The Case conversion section defaults to *No conversion*.

9. In the **Case conversion** section, select the conversion option you want to use.

The Documents section determines whether the authority list values are created from the field values in the current query or the entire database.

10. In the **Documents** section, select the **Current query** or **Entire database** option.
11. Click the **Load** button to add the field values to the authority list.
12. To view, add, or delete the new list values, click the **Edit** tab and do any of the following:
 - To add a new value, in the **Key** field, type the new value and click the **Add** button.
 - To delete a value, click the value in the value list and click the **Delete** button.
13. When you have finished creating the authority list, click the **Done** button to save your new list.

To create an authority list from an ASCII file:

If you have an ASCII file with listed or delimited data you can save time by importing it into an authority word list.

1. On the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

2. On the **Lists** tab, click the **New** button.

Clicking the New button opens the *Allow duplicates in new list file?* message.

3. To allow duplicate values in the authority list, click **Yes**.

If you do not want to allow duplicate values, click No.

Clicking Yes or No opens the *Create a case sensitive list file?* message.

4. To set the authority list to be case sensitive, click **Yes**.

If you want the authority list to not be case sensitive, click No.

Clicking Yes or No opens the Save As dialog box.

5. Navigate to the directory where you want to store the authority list's .lst file, type the name of the authority list file in the **File name** field, and click **Save**.

Clicking Save opens the new authority list in the List File Management dialog box.

6. Click the **Import/Export** tab.

List File Management - Custodian.Lst

Lists | Edit | **Import/Export** | Authority List

Import/Export

☒ **Import** Select this option to import a delimited file into the list.

☐ **Export** Select this option to export the list to a delimited file.

Data value delimiter

☒ Include data values

☒ Comma ☐ Other

☐ Tab

Range

☒ All entries From

☐ Range To

Import

Done **Help**

7. In the **Import/Export** section, click the **Import** option.

The Data value delimiter section determines which delimiter is used to separate the list values from each other in the authority list's .lst file. By default, the Include data values check box and Comma option are selected in the Data value delimiter section.

For more information about delimiters, see About delimiter characters.

Data values are not used by the authority list. For the authority list, it does not matter whether the Include data values check box is selected. If it is selected, the import populates the Data value field on the Edit tab in the List File Management dialog box with any data values in the ASCII file.

8. In the **Data value delimiter** section, select the delimiter option you want to use in the .lst file.
9. Click the **Import** button.

Clicking the Import button opens the Open dialog box.

10. Navigate to and open the ASCII .txt file you want to use for the authority list.

The values in the .txt file are added to the authority list.

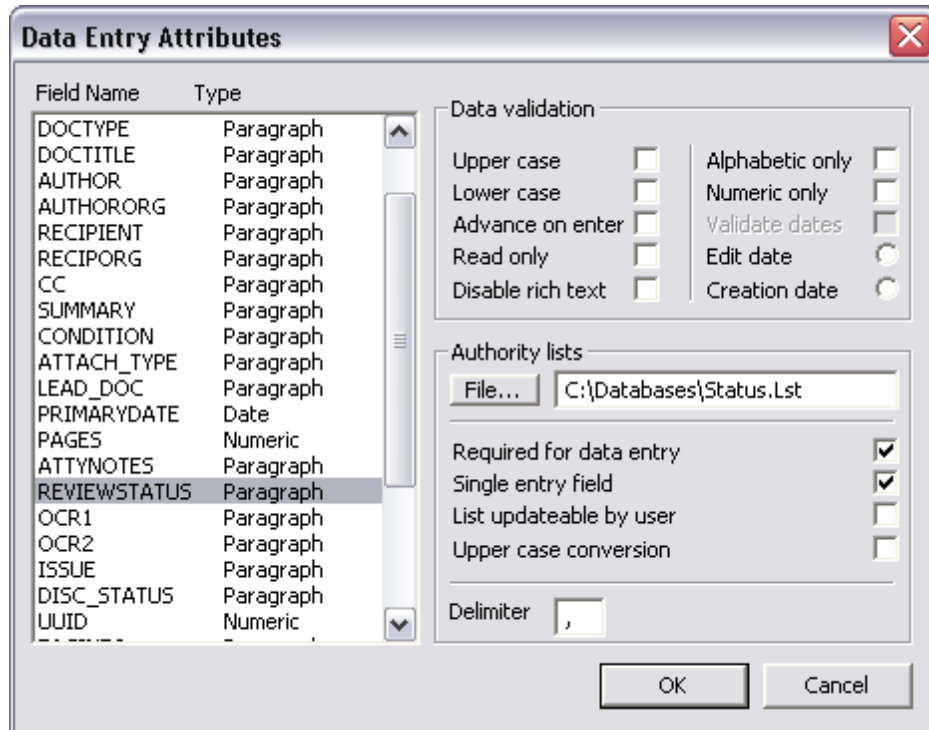
11. To view, add, or delete the new list values, click the **Edit** tab and do any of the following:
 - To add a new value, in the **Key** field, type the new value and click the **Add** button.
 - To delete a value, click the value in the value list and click the **Delete** button.
12. When you have finished creating the authority list, click the **Done** button to save your new list.

 To associate an authority list with a field:

Once you have created an authority list in Concordance, you need to associate the word list to a field so it can be used for data entry in the Edit view.

1. On the **Edit** menu, click **Validation**.

Clicking Validation opens the Data Entry Attributes dialog box.



The **Data Entry Attributes** dialog box is shown. It has a title bar with a close button. The main area is divided into two sections. The left section is a list of fields with their types. The right section contains settings for data validation and authority lists.

Field Name	Type
DOCTYPE	Paragraph
DOCTITLE	Paragraph
AUTHOR	Paragraph
AUTHORORG	Paragraph
RECIPIENT	Paragraph
RECIPIORG	Paragraph
CC	Paragraph
SUMMARY	Paragraph
CONDITION	Paragraph
ATTACH_TYPE	Paragraph
LEAD_DOC	Paragraph
PRIMARYDATE	Date
PAGES	Numeric
ATTYNOTES	Paragraph
REVIEWSTATUS	Paragraph
OCR1	Paragraph
OCR2	Paragraph
ISSUE	Paragraph
DISC_STATUS	Paragraph
UUID	Numeric

Data validation

Upper case	☐	Alphabetic only	☐
Lower case	☐	Numeric only	☐
Advance on enter	☐	Validate dates	☐
Read only	☐	Edit date	☐
Disable rich text	☐	Creation date	☐

Authority lists

File... C:\Databases\Status.Lst

Required for data entry	☒
Single entry field	☒
List updateable by user	☐
Upper case conversion	☐

Delimiter ,

OK Cancel

2. In the **Field Name** list, click the field you want to add the authority list.

3. In the **Authority lists** section, click the **File** button.

Clicking the File button opens the Open dialog box.

 The Data validation and Authority lists sections in the Data Entry Attributes dialog box are independent sections. For example, assigning an authority list with words to a field selected as Numeric only does not cause an error. The data from the authority list overwrites the Numeric only setting.

4. Navigate to and open the authority list file, **.lst**.
5. Select the check boxes that apply to the authority list in the field.

 Authority lists check box definitions

- **Required for data entry** - When the user's cursor is placed in the empty field, the authority list automatically opens. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field. When the Required for data entry check box is selected, users can only choose a field value from the list or cut, copy or paste the text in the field.
 - **Single entry field**- The field only allows one field value from the list to populate the field. If a user clicks another field value from the list, the original value is replaced by the newly selected value. You can select both the Single entry check box and the Required for data entry check box to ensure users only populates the field with one field value from the authority list.
 - **List updateable by user**- Users can add and delete field values from the authority list assigned to the field. If you do not want users to modify the authority list, be sure the List updateable by user check box is not selected. When the List updateable by user check box is selected, the Insert and Delete buttons are displayed at the bottom of the authority list dialog box.
 - **Upper case conversion**- Concordance automatically converts all text to upper case before text is copied to the field or the text is added to the authority list. Do not select the Upper case conversion check box if you are using an existing authority list containing lower case field values. If the check box is selected in this scenario, when a user selects a lower case field value from the list, the value will not be added to the field.
6. The **Delimiter** field defaults to the comma character. To change the field delimiter, type a different character in the **Delimiter** field.

The character in the Delimiter field is used to separate field values that were added to the field from an authority list. Delimiters are also used by exploded sort reports and the tally function to determine where one entry ends and another begins.

7. Click **OK** to save your changes.

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

To test an authority list:

After associating an authority list with a field, you can test to make sure that the authority list opens for the field in the Edit view.

1. In the **Browse** or **Table** view, select a record.
2. On the **Standard** toolbar, click the **Edit** button to open the record in the **Edit** view in edit mode.
3. Click the field you associated with the authority list.

If the Required for data entry check box is selected for the authority list in the Data Entry Attributes dialog box, the authority list automatically opens when you click in the field if the field is empty. If the field is already populated, the authority list opens when a user clicks the right mouse button or attempts to type in the field.

When the Required for data entry check box is selected, users can only choose a field value from the list or cut, copy or paste the text in the field.

If the Required for data entry check box is not selected for the authority list in the Data Entry Attributes dialog box, users can right-click in the field to open the shortcut menu, and click the authority list file name to open the authority list associated with the field.

Making global replacements

Global replacements allows you to search and replace words, phrases, dates, or carriage returns in specific fields throughout your entire record database. The Global Replace dialog box is used to run global replacements. You can search and replace populated or empty fields, with or without case sensitivity. Global replacements only work on the current query.

 Global edits are immediately saved and committed to a database. There is no undo option. We recommend that you always back up the database before making any global replacements.

To make global replacements:

1. Back up your database before running the global replacement.

For more information about backing up Concordance databases, see About backing up databases.

2. Run a search query to located the records that need a global edit.

For more information about searching, see Available search tools.

3. On the **Edit** menu, click **Global Replace**.

Clicking Global Replace opens the Global Replace dialog box.

Global Replace

Field	Type
BEGNO	Text
ENDNO	Text
DOCDATE	Date
DOCTYPE	Paragraph
DOCTITLE	Paragraph
AUTHOR	Paragraph
AUTHORORG	Paragraph
RECIPIENT	Paragraph
RECIPORG	Paragraph
CC	Paragraph
SUMMARY	Paragraph
CONDITION	Paragraph
ATTACH_TYPE	Paragraph
LEAD_DOC	Paragraph
PRIMARYDATE	Date
PAGES	Numeric
ATTYNOTES	Paragraph
REVIEWSTATUS	Paragraph
OCR1	Paragraph
OCR2	Paragraph
ISSUE	Paragraph

Target: 00000000

Replacement: 20071218

Document range:
 First: 1
 Last: 17

Replace options:
 Ignore case: ☐
 Confirm before replace: ☒

Status:
 Documents: 17
 Replacements: 3

00000000

OK Done

- In the **Field** list, click the fields containing the text you want to replace.

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

During a global replacement, Concordance will only search the fields currently selected in the Field list.

- In the **Target** field, type the text you want to replace.
- In the **Replacement** field, type the text you want to add to the field.

To search or replace empty fields:

To replace empty fields in the database with the text in the Replacement field, leave the Target field blank.

To remove the text in the Target field from the selected fields in the database, leave the Replacement field blank.

An empty target will replace all fields selected with the replacement text, if the field

is empty. Since all fields are automatically selected by default in the Field list, it is important to only select the fields you want to replace in the Field list.

 To search or replace hard carriage returns:

To search or replace hard carriage returns in you data, type \n in the Target or Replacement field to represent a hard carriage return. If you need to search or replace the actual \n character combination in your data, instead of a hard carriage return, then type \\n in the Target or Replacement field. Typing \\n lets Concordance know that you are searching for the\n character combination and not a hard carriage return.

 To search or replace dates:

To search or replace dates in date fields, the format of the dates entered in the Target and Replacement fields must match the date format set up for the selected date fields.

A date field's date format is set in the Type field in the New dialog box when creating a database or in the Modify dialog box when modifying databases.

For example, if you are performing a global replacement for the DOCDATE field and the Type field for the DOCDATE field is set to DateMMDDYYYY in the New or Modify dialog box, the dates entered in the Target and Replacement fields in the Global Replace dialog box must use the same MMDDYYYY format.

Dates should be zero filled. For example, if the date format is MMDDYYYY, July 17, 1960 is entered as 07171960. It is also valid to use partial dates as targets and replacements, such as 1013 for October 13, but do not use a partial date to replace a complete target. This will result in invalid date field entries.

In the Document range section you can specify a document range within the current query to have Concordance search and replace text only within this range. The First field defaults to the first document in the current query and the Last field defaults to the last document in the current query.

7. In the **First** field, type the first document in the current query to search for the global replacement.
8. In the **Last** field, type the last document in the current query to search for the global replacement.

By default, the Ignore case check box is not selected. When the Ignore case check box is not selected, field text must exactly match the text in the Target field, including capitalization, before Concordance will attempt a replacement.

9. To enforce case sensitivity during global replacements, leave the **Ignore case** check box blank.

To ignore upper and lower case lettering during global replacements, select the Ignore case check box.

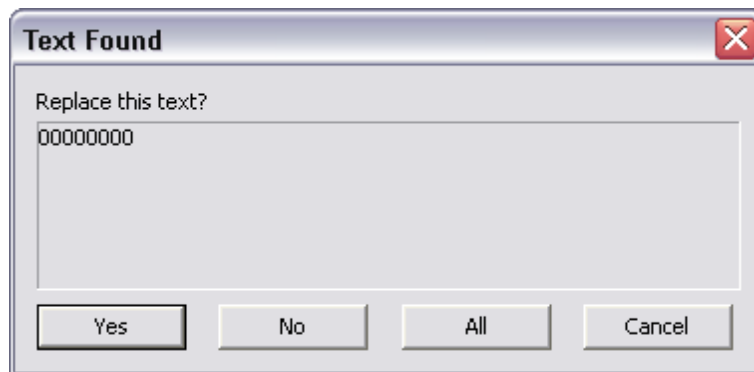
By default, the Confirm before replace check box is not selected. When the Confirm before replace check box is not selected, Concordance automatically searches and replaces the text in the documents in the current query without asking for confirmation before each replacement.

10. To make the global replacements with out confirmation, leave the **Confirm before replace** check box blank.

To request confirmation before replacing text, select the Confirm before replace check box.

11. Click **OK** to make the global replacements.

If the Confirm before replace check box is selected in the Global Replace dialog box, each time Concordance locates the text in the Target field during the global replacement, Concordance displays the text found in the Text Found dialog box.



12. In the **Text Found** dialog box, do one of the following:

- Click **Yes** to replace the text.
- Click **No** to ignore the currently found text and continue the global replacement process.
- Click **All** to replace all additional targets without confirmation.
- Click **Cancel** to cancel the global replacement process.

Once the global replacement process finishes, in the Status section, the Documents field displays the number of documents searched and the Replacements field displays the number of replacements made. The field below the Field list and Status section displays the replaced text.

13. Click the **Done** button to close the **Global Replace** dialog box.

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

 To ensure that your edits are searchable in a timely manner, coordinate with your Concordance administrator regarding the reindexing schedule. If any edits are made that require a reindex, a check mark displays in the File menu next to Reindex.

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

About attachments

When paper documents are scanned to TIFF formatted files, the documents are unitized according to their physical or logical boundaries. When loaded into Concordance, parent documents and their attachments may be broken out into separate records.

If a document and its attachments were scanned as one entire document, there may be only a Begin and End Bates number field for each record in the database that reflect whole documents. If parent documents and attachments have been broken out into separate records, there may be a Begin and End Bates number field, as well as a Begin and End Attachment field or Attachment Range field in the database for each record.

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

The Find Attachment command gathers related parent and attachment documents in a database based on the fields containing the attachment information for an active query. The Find Attachments command looks for attachments where the attachment ranges are stored in a single field or two separate fields. The Find Attachments can be set up when creating a database using the New Database Creation Wizard, or using the preferences. For more information about setting up the fields for the Find Attachment command for the database, see Defining preferences.

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

Document and Attachment Field Examples:

The following examples show some possible document and field scenarios in a Concordance database:

Example 1 - Parent Document with Two Attachments

1st Record (Parent Document)

BEGDOC: DSC0000001

ENDDOC: DSC0000001

BEGATTACH: DSC0000001

Example 1 - Parent Document with Two Attachments

ENDATTACH: DSC0000010

2nd Record (First Attachment)

BEGDOC: DSC0000002

ENDDOC: DSC0000004

BEGATTACH: DSC0000001

ENDATTACH: DSC0000010

3rd Record (Second Attachment)

BEGDOC: DSC0000005

ENDDOC: DSC00000010

BEGATTACH: DSC0000001

ENDATTACH: DSC0000010

Notice that in each example above, the BEGDOC and ENDDOC fields reflect the Bates number range of the parent document and each attachment document. The BEGATTACH and ENDATTACH fields reflect the Bates range of the entire document (parent and all attachments).

Example 2 - Parent Document with One Attachment using Attachment Range Field**1st Record (Parent Document)**

BEGDOC: DSC0000001

ENDDOC: DSC0000002

ATTACHRANGE: DSC0000001- DSC0000010

2nd Record (First Attachment)

BEGDOC: DSC0000003

ENDDOC: DSC00000010

ATTACHRANGE: DSC0000001- DSC0000010

Example 3 - Doc IDs with a Parent Document and One Attachment

1st Record (Parent Document)

DOCID: DSC00000001

PARENTDOCID: DSC00000001

2nd Record (First Attachment)

DOCID: DSC00000002

PARENTDOCID: DSC00000001

In this scenario, the PARENTDOCID field establishes the parent to attachment relationship for this document. Notice there are many field naming conventions and other possible styles for Parent and Attachment fields in a Concordance database.

To locate documents and related attachments:

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

To run a query and include all documents and attachments:

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

Updating hyperlinks

Hyperlinks often require updating or replacement if you move database files to another

network directory. Hyperlinks are stored in the [database name]-Notes.dcb file for each database.

If you move your native documents or attachments from one drive to another, you need to globally replace the drive letter in the NOTEATTACHED field of the Notes.dcb. If your attachment includes the full directory file path in the main database, you also need to replace the drive letter in the FILEPATH field.

For more information about global replacements, see [Making global replacements](#).

Checking for duplicate records

After importing records, you may want to check for duplicates in Concordance. Duplicates are identified by comparing the content in selected fields. When Concordance finds duplicate records, Concordance tags each of the duplicate records. Give some forethought to what fields you want to use to check for duplicates. Before checking for duplicate records, make sure that there are not any records that were tagged in a previous duplicate check before you start the process again.

It is best practice to remove access to the Check for Duplicates menu command on the Tools menu from most users, except your advanced users.

When Concordance checks for duplicate records, Concordance only checks the records in the current query. If you want Concordance to check for duplicates in the entire database, be sure to run the Zero Query before checking for duplicates.

The duplication detection categorizes documents in three ways:

- When a record is unique, no tag is assigned to the record
- The first time a duplicate record appears, the Original tag, or its equivalent, is assigned to the record
- The subsequent times the duplicate record appears, the Duplicate tag, or its equivalent, is assigned to the records

To check for duplicate records:

1. Run a search query to locate the records you want to search for duplicate records.

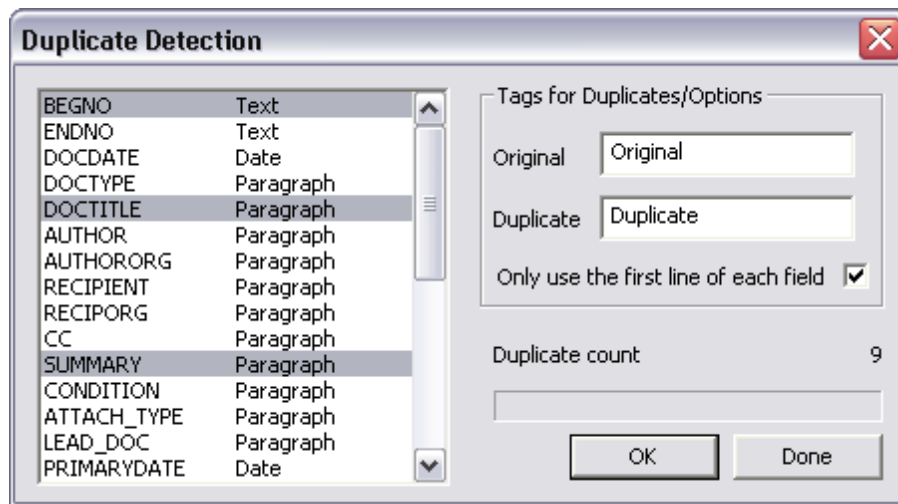
For more information about searching, see [Available search tools](#).

When Concordance checks for duplicate records, Concordance only checks the records in the current query. If you want Concordance to check for duplicates in the entire database, be sure to run the Zero Query before checking for duplicates.

For more information about the Zero Query, see [Reviewing search queries](#).

2. On the **Tools** menu, click **Check for duplicates**.

Clicking Check for duplicates opens the Duplicate Detection dialog box.



3. In the field list, click the fields you want Concordance to compare to identify duplicate records in the database's current query.

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

You can select as many fields as you want, but there is a limit of 245 characters that can be compared. Paragraph fields count as sixty characters.

When you first open the Duplicate Detection dialog box, the Original field defaults to Original and the Duplicate field defaults to Duplicate. The Original field determines the name of the tag applied to the first record encountered in a duplicate record set, and the Duplicate field determines the name of the tag applied to the second record in a duplicate record set. You can modify the tags names in the Original and Duplicate fields to any tag name you want Concordance to use for duplicate records.

4. Before checking for duplicate records in the database, make sure that the database does not have any records that were already tagged with these tag names from a previous check for duplicate records.
5. If you selected a paragraph field in the field list, it is best practice to select the **Only use the first line of each field** check box.

If you do not want Concordance to compare all of the text in a field, up to the 245 character limit, clear the Only use the first line of each field check box.

6. Click **OK** to check for duplicate records.

The Duplicate count field displays the number of duplicate records found during the duplicate record check. Any duplicate records are tagged.



7. Click the **Done** button to close the **Duplicate Detection** dialog box.
 8. To view the duplicate records, query the **Original** and **Duplicate** field tags.
- For more information about querying tags, see [Creating queries from tags](#).

Tallying Duplicates

You can also use the Tally feature in the Tally task pane to help identify duplicate records in the database. The Tally feature creates an itemized list of data values within a field, including the number of occurrences of each data value in the field.

For more information about the Tally feature, see [Searching by tally](#).

About deleting records

You may need to delete records if there are duplicate records or opposing counsel unintentionally produced privileged documents. Deleting records is a two-step process: mark for deletion, then pack the database to permanently remove the records. Reviewers can flag records for deletion, but they are not permanently removed from the database until the database is packed. Packing a database permanently deletes the records from the database, and there is no undo function for this process, therefore the Pack Database menu command should only be available to administrators.

Once records are flagged for deletion, you can run a query to review those flagged documents. This is your only fail-proof means of restoring a record after it is removed from the database. If you find that you later need to restore the deleted records, the only way to restore a record permanently deleted from a database is to import the deleted records back into the database.

Deleting Records Overview:

- Deleting is a three-step process: mark for deletion, remove tags from the records marked for deletion, and then pack the database
- Make a back-up copy of records marked for deletion by exporting those records to another Concordance database
- Packing is permanent; there is no Undo button

- Packing the database is an exclusive process
- When security is enabled, users will be required to have the administrator user ID and password in order to pack the database

📌 When packing concatenated databases, you must pack each database individually.

Related Topics

Deleting records in Concordance
Exporting databases
Importing Concordance databases

Deleting records in Concordance

Deleting records is a two-step process: records are marked for deletion, then the database is packed to permanently remove the records. Packing a database permanently deletes the records from the database, and there is no undo function for this process.

Before permanently deleting any records, you first need to run a query for all records marked for deletion to review the documents. It is recommended that you remove any tags applied to the deleted records. For more information, see [About deleting records](#).

You can also permanently delete all records in the current database using the Zap menu command on the Administration menu. When you zap a database, all documents and search files are erased and free space is returned to Concordance.

To mark records for deletion:

For step-by-step instructions to mark individual and multiple records for deletion, see [Deleting records in the Using Concordance module](#).

To search for deleted records:

1. On the **Search** menu, click **Search for documents marked for deletion**.
2. Clicking **Search for documents marked for deletion** creates a query of the records currently marked for deletion in the database.

When a record is marked for deletion, DEL is displayed on the Status bar.

3. In the **Browse** or **Table** view, review the records in the query to determine whether the records should be permanently removed from the database.
4. If any records in the query should not be permanently deleted, remove the delete status

from the applicable records.

To remove the delete status from a record, see *To unmark individual records for deletion* in the Deleting records topic.

5. If you removed the delete status from any records in the query, click **Search for documents marked for deletion** on the **Search** menu again to update the query to only include the records you want to permanently delete.

To export the records marked for deletion:

After reviewing the records marked for deletion and updating the query to only include the records that will be permanently deleted, it is best practice to export these records to another database.

 Always export your deleted records before you pack the database, just in case you need to retrieve them later. Once you pack a database, any records marked for deletion are permanently removed. There is no undo function for this process.

Use the Export As a Concordance database menu command to export the records marked for deletion. When you use the Export As a Concordance database menu command, Concordance exports all the records in the current query to a new database. For more information and step-by-step instructions, see Exporting databases.

To pack the database:

After backing up the records marked for deletion, you are ready to permanently remove the records from the database.

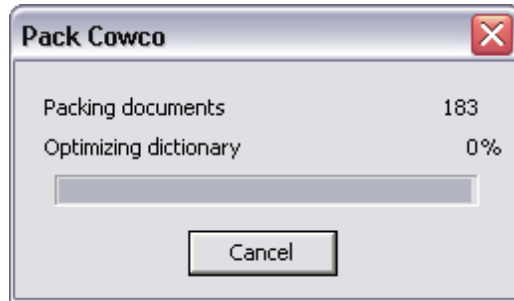
 Remember, there is no undo function for this process. Records are immediately and permanently removed from the database, unless you export a copy of your deleted records.

1. On the **File** menu, point to **Administration**, point to **Pack**, and then click **Database**.
2. Clicking **Database** opens the **Administration** dialog box.



3. In the **User** field, type the administrator's user ID.
4. In the **Password** field, type the administrator's password.
5. Click **OK**.

Clicking OK opens the Pack dialog box and starts the pack process.



When Concordance finishes permanently deleting the records marked for deletion, the Pack dialog box closes.

6. Verify that the records were deleted.

To verify the records were deleted, open the **Table** view and scan your record listing. The records marked for deletion should no longer be listed.

 If you have an ACCESSID field in your database, you will notice that the accession number does not readjust for deleted records. This allows you to view gaps in your database records.

It is best practice to pack the dictionary after packing the database. For more information, see Packing the dictionary.

To zap a database:

Zapping a database permanently deletes every record in the active database. All documents and search files are erased and free space is returned to Concordance. If databases are concatenated, only the documents and search files in the primary database are erased when you zap a database in a set of concatenated databases.

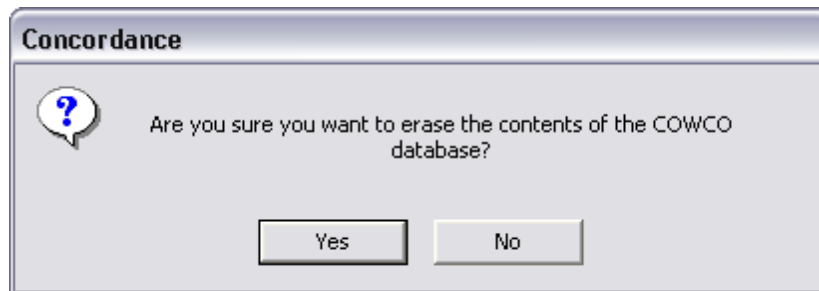
 It is best practice to not give users access to the Zap menu command due to the risks involved in deleting all records in a database. There is no undo function for this process.

1. On the **File** menu, point to **Administration**, and click **Zap**.
2. Clicking **Zap** opens the **Administration** dialog box.



3. In the **User** field, type the administrator's user ID.
4. In the **Password** field, type the administrator's password.
5. Click **OK**.

Clicking OK opens following message:



6. Click **Yes** to zap the database.

Click No to cancel the zap process.

After the zap process completes, *No documents in query* is displayed on the Status bar.

Packing the dictionary

Packing the dictionary is similar to defragmenting your hard drive; it gets rid of unnecessary entries to keep your system running faster and smarter. Good routine maintenance is to pack the dictionary after you pack the database and also each time you reindex.

Packing the database regularly:

- Increases database processing and search speed
- Increases reindex speed by up to 6X
- Optimizes the dictionary file and makes it smaller

For more information about packing databases, see Deleting records in Concordance.

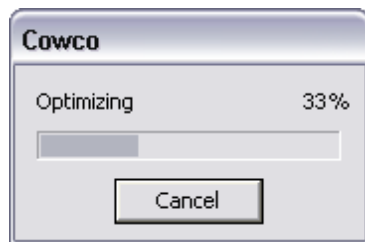
☐ **To pack the dictionary:**

1. On the **File** menu, point to **Administration**, point to **Pack**, and then click **Dictionary**.
2. Clicking **Dictionary** opens the **Administration** dialog box.



3. In the **User** field, type the administrator's user ID.
4. In the **Password** field, type the administrator's password.
5. Click **OK**.

Clicking OK opens the pack status dialog box and starts the pack process.



When Concordance finishes packing the dictionary, the status dialog box closes.

About modifying databases

When you make a modification to a database, it usually means that you are modifying fields in the database. When you modify a database, you need to be careful. Concordance has no restrictions for database modifications, but we do offer recommendations on what you should and should not do so you are less likely to corrupt your database.

⚠ Modifications made to a database is a common reason for corruption. Please use caution when making changes and always back up your database files before doing so. Also it is a

good practice to close other databases while making database modifications.

- ✍ If you are modifying the database structure and using an active sorting layout or table layout, you must delete .Sortinglayout and .layout files and the files will be rebuilt to accommodate the new database structure the next time you open the database.

Always back up a database's files before you make any changes to the database. Some modifications are more dangerous than others, and database modifications always require a full index update immediately afterwards. Most modify functions rebuild the database and erase the dictionary, requiring you to index the database from scratch. We recommend that you plan ahead to allocate time for database modification since it requires exclusive access to the database and time to run a full index.

Certain changes that do not require a database rebuild:

- Changing a date field's display type
- Changing only one field's name
- Adding or deleting key fields

If you have applied security, you must also give users access to any new or renamed fields before they are visible in the database. New and renamed fields are not visible in the Table view until they are added to the layout structure.

- 💡 If you are renaming a field and moving or changing the field's type, it is best not to rename it at the same time. Instead, change a field name in one step. Then come back and modify the field type or location in another step.

Remember the 3 Change Rule for databases: We recommend that you not make more than three changes to a database before indexing. After making three changes in the Modify dialog box, click OK to save your changes, and then index the database. For more information about indexing databases, see Indexing and reindexing updates.

- ✍ If Concordance security is enabled, the Modify dialog box can only be accessed by a user that has full read/write access to all fields.

 Database Modification Guidelines

Database Modification Guidelines	
Risk	Activity
Less Dangerous	Adding/removing punctuation
	Changing a field's length

Database Modification Guidelines	
Risk	Activity
	Changing field properties (index or key)
	Changing data types (text to paragraph)
	Adding a new field at the end of the list
	Inserting a new field in the middle of the list
	Renaming a field – A common cause of database corruption!
	Delete or insert a field elsewhere – common cause of database corruption.
More Dangerous	Making more than one change to the same field, at the same time
💡 If you need to change a field name, make a new field first and run the AppendOneFieldToAnother_v[version #].cpl, then hide the other field from users in the Security dialog box. Do not delete it!	

How to modify a database:

1. Make a back-up copy of the database you are modifying. Do not proceed to step 2 until you have completed this procedure.

⚠ Do not perform live backups if you are using backup software that locks files, even briefly. This has been known to cause read/write functions to the database files to fail, and can cause file synchronization or corruption issues. Check with your IT group and/or backup solution provider to verify that no file locking occurs before scheduling any backups on Concordance, Concordance Image, and FYI files that are in use.

Be aware that anti-virus, firewall, and backup software can often interfere with network traffic and the locking of files, and in effect, could cause Concordance, Concordance Image, and FYI Server software to crash.

For more information about backing up databases, see About backing up databases.

2. Once your database backup copy is secure, open the database you want to modify and close all other databases.
3. On the **File** menu, click **Modify**.

Clicking Modify opens the Modify dialog box.

Field Name	Type	Length
BEGNO	Text	15
ENDNO	Text	15
DOCDATE	Date	MMDDYYYY
DOCTYPE	Paragraph	
DOCTITLE	Paragraph	
AUTHOR	Paragraph	
AUTHORORG	Paragraph	
RECIPIENT	Paragraph	
RECIPIORG	Paragraph	
CC	Paragraph	
SUMMARY	Paragraph	
CONDITION	Paragraph	
ATTACH_TYPE	Paragraph	
LEAD_DOC	Paragraph	
PRIMARYDATE	Date	MMDDYYYY
PAGES	Numeric	20.0
ATTYNOTES	Paragraph	
REVIEWSTATUS	Paragraph	
OCR1	Paragraph	
OCR2	Paragraph	
ISSUE	Paragraph	
DISC STATUS	Paragraph	

Status
Documents: 203
Fields: 32

Punctuation: -/.,; '@&

Name: BEGNO
Type: Text
Length: 15
Places:
Format:

☒ Image ☒ Key ☐ Accession
☐ System ☐ Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

4. Make the necessary changes.

For more information about database fields, see About fields.

For more information about filling out the New or Modify dialog box, see the "Create a Database" section in the Creating databases topic.

- 💡 If you are renaming a field and moving or changing the field's type, it is best not to rename it at the same time. Instead, change a field name in one step. Then come back and modify the field type or location in another step.

Remember the 3 Change Rule for databases: We recommend that you not make more than three changes to a database before indexing. After making three changes in the Modify dialog box, click OK to save your changes, and then index the database. For more information about indexing databases, see Indexing and reindexing updates.

5. Click **OK** to save your changes and close the **Modify** dialog box.
6. Run a full index.

For more information about indexing databases, see Indexing and reindexing updates.

- 🔧 Whenever you add or rename a field in the database, it is added to the database without field access rights. In the Security dialog box, the No rights check box is automatically selected for the field. You will need to set the field privileges for the new or renamed field for users already entered in the Security dialog box.

For more information about field access rights, see Setting up security.

Replicating databases

What if a user needs to review documents and make annotations to images, but doesn't have remote access options like FYI Reviewer? With Concordance, you can create a copy of your database records and images so reviewers can work offline, and then synchronize any edits and changes back into the primary database to update to the document collection. The synchronization process helps merge the most recent updates with other user updates, and provides a listing of any collisions so you can resolve any field and/or note discrepancies between the original and replicated databases.

Replication vs Synchronization:

- Replication is creating an exact copy of your database while tracking the replicated copy.
- Synchronizing databases is merging the replica database to the primary database, and reconciling any updates or edits.

When replicating and synchronizing databases, we recommend that you follow the directions in all dialog boxes and use all fields, if possible. For concatenated databases, you must replicate each database individually.

-  When replicating a database, be aware that the .dir, .vol and .cib files are not replicated and the replicated database will not be able access Concordance Image or Concordance Native Viewer.

To replicate and synchronize databases, follow the steps below in the order they are listed:

Enable Replication

The first step in replicating a database is to enable replication. You can replicate a database without enabling replication, but you will not be able to synchronize back to the publishing database. If replication is enabled, you can replicate both ways.

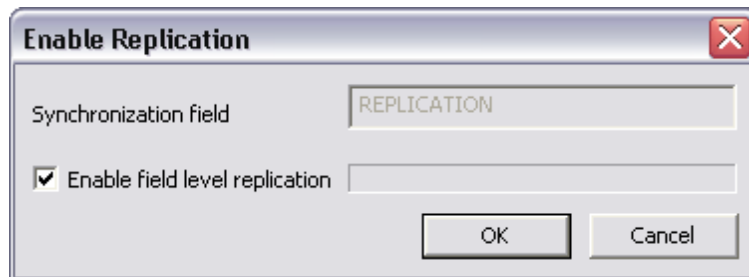
To enable replication:

1. Back up the database you want to replicate.

It is essential that you create a backup copy of your database before enabling replication. You can cancel the process at any time before it is half-way complete. After the half-way mark, the Cancel button is disabled and the process must complete. If you want to cancel the process after the half-way mark, you will have to restore your database from backup.

2. In Concordance, open the database you want to replicate.
3. On the **Tools** menu, point to **Replication**, and click **Enable replication**.

Clicking Enable replication opens the Enable Replication dialog box.



The Synchronization field field is a read-only field. When you enable replication in a database, Concordance creates the REPLICATION field in the database. The REPLICATION field is system field that tracks your replicated database and is administered by Concordance. If you need to change the REPLICATION field name, you can modify the field in the Modify dialog box.

The Enable field level replication check box enables field-level replication. Concordance can track changes on a field-by-field basis. If two people edit the same record and then synchronize, Concordance will detect if the edits were to different fields and merge the edits without signaling a collision. Without field-level replication, Concordance cannot arbitrate the edits and it will flag a collision.

Enabling this feature adds entries to the database tracking file, called [database name].trk, for each edit. The tracking file adds overhead to the system in terms of file storage space and the computer time needed to manage it. The overhead is generally low and you should enable this feature. You can disable it later if you find that it is unnecessary.

4. To enable field-level replication, select the **Enable field level replication** check box.

If you do not want to enable field-level replication, leave the **Enable field level replication** check box blank.

5. Click **OK** to enable replication.

Replicate the Database

When you replicate a database, the replica database contains all security settings from the original database. You can create a replica database that only contains the records in the current query, in sorted order, or all the records in database.

 Concatenated databases cannot be replicated.

 When replicating redlines databases, it is important to save the replica in the same directory folder as the main database replica and also name it the same to keep track of your files.

To replicate a database:

1. Make sure that the database you want to replicate is backed up.
2. Run a search query to locate the records you want to include in the replica database.

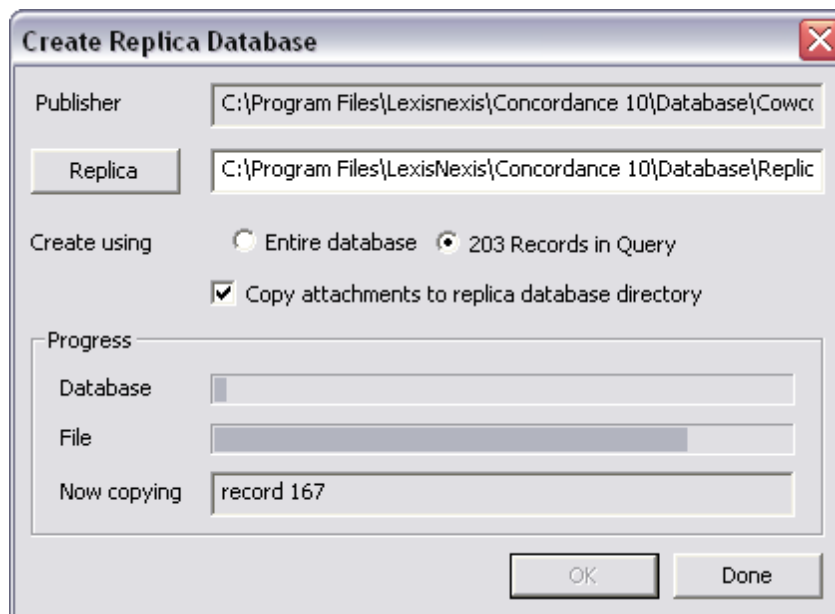
For more information about searching, see Available search tools.

When Concordance creates a replica database, Concordance can replicate just the records in the current query or all the records in the database. To replicate all of the records, run the Zero Query and/or select the Entire database option in the Create Replica Database dialog box.

For more information about the Zero Query, see Reviewing search queries.

3. On the **Tools** menu, point to **Replication**, and click **Create a replica**.

Clicking Create a replica opens the Create Replica Database dialog box.



The Publisher field displays the name and path of the current database.

4. Click the **Replica** button.

Clicking the **Replica** button opens the **New Replica Database** dialog box.

5. Browse to where you want to save the replica .dcb database file, type the replica database file name in the **File name** field, and click **Open**.
6. In the **Create Using** field, select the **Entire database** or **[#] Records in Query** option.

When the Entire database option is selected, Concordance replicates all the records in the database. When the [#] Records in Query option is selected, Concordance only replicates the records in the current query.

-  If you want your database permanently sorted, you should sort the database and then create a replica by using the [#] Records in Query option. The replica database will be permanently sorted.

When a database is replicated, the database's notes database is replicated along with the main database. Concordance can copy any external files attached to those notes to the replica database's destination directory. This is useful for laptops that will not be connected to the network, but still need to access the attachments.

7. To copy the attachments associated with the records to the replica database's directory, select the **Copy attachments to replica database directory** check box.

When the check box is selected, Concordance copies the files and changes the file path in the note to the replica database's directory.

When the check box is not selected, the replica database will reference the same attachments and locations as the original database.

8. Click **OK** to replicate the database.

While Concordance is creating the replica database, the Progress section displays processing progress for the database, file, and current record being copied.

You can cancel the replication process at any time by clicking the Done button. Any files created up to the cancellation point are erased.

9. When the replication process is complete, click the **Done** button.

-  The new replica database will not be indexed.

Synchronize the Databases and Resolve Collisions

After edits are made to the original and/or replica database, you need to synchronize the databases to update them.

Synchronization copies any changes between the databases. The synchronization options allow you to fine tune the replication process. You can set your database to publish data but not receive any updates, a read-only publishing scenario. You can set the options so that you are receiving changes, but not delivering them, or you can enable full replication with complete synchronization between the two databases.

The Replication dialog box is used to define the synchronization options and run the synchronization. The default options in the Replication dialog box are set for full symmetric, bi-directional synchronization.

To synchronize the databases and resolve field collisions:

1. In Concordance, open the original or replica database.
2. On the **Tools** menu, point to **Replication**, and then click **Synchronize databases**.

Clicking Synchronize databases opens the Replication dialog box.

Replication

Publisher: C:\Databases\Cowco

Subscriber: C:\Databases\Replica Of Cowco.Dcb

Tag for Collisions: Replica Collisions

Synchronization

- ☒ Synchronize Databases
- ☐ Subscriber Overwrites Publisher
- ☐ Publisher Overwrites Subscriber
- ☒ Copy attachments with notes

Deletions

- ☒ Mark for Deletion
- ☐ Tag Deleted Records
- ☐ Append/Restore Deleted Records

Fields

- ☒ Use All Publisher Fields
- ☐ Use Selected Publisher Fields

New Records

- ☒ Append records to Publisher
- ☒ Append records to Subscriber

Progress

Replicating	0
Collisions	0
Deletions	0
Tags	0
Replicated	0

Buttons: Save Settings, Advanced, Synchronize, Done

The database name and path for the database you opened is displayed in the Publisher field.

The database displayed in the Publisher field is the database you currently have open in Concordance. Any database can be a publisher or a subscriber. The synchronization settings you choose in the Replication dialog box are saved with the database in the Publisher field.

3. Click the **Subscriber** button.

Clicking the Subscriber button opens the Subscriber database dialog box.

4. Navigate to and open the database you want to synchronize with the database in the **Publisher** field.

If the original database is currently open and displayed in the Publisher field, select the replica database in the Subscriber field. If the replica database is currently open and displayed in the Publisher field, select the original database in the Subscriber field.

Clicking Open adds the selected database's path and file name to the Subscriber field.

5. To tag records that have collisions between the original and replica database, type the tag name you want to use in the **Tag for Collisions** field.

Creating a tag for collisions helps you quickly identify the records in the databases that have or have had collisions, depending on whether you choose resolve database collisions during or after the synchronization process.

6. In the **Synchronization** section, select one of the following options:

- **Synchronize Databases** Fully synchronizes both databases. All changes from the subscriber database are copied to the publisher database, and all changes from the publisher database are copied to the subscriber database.
- **Subscriber Overwrites Publisher** During the synchronization, only the changes in the subscriber database are added to the publisher database. Data in the subscriber database overwrites the data in the publisher database.
- **Publisher Overwrites Subscriber** During the synchronization, only the changes in the publisher database are added to the subscriber database. Data in the publisher database overwrites the data in the subscriber database.

If you select the Subscriber Overwrites Publisher or Publisher Overwrites Subscriber option, be sure you know which database is most current before running the synchronization to ensure you do not accidentally overwrite updates.

7. To copy the attachments associated with the records from one database to another, select the **Copy attachments with notes** check box.

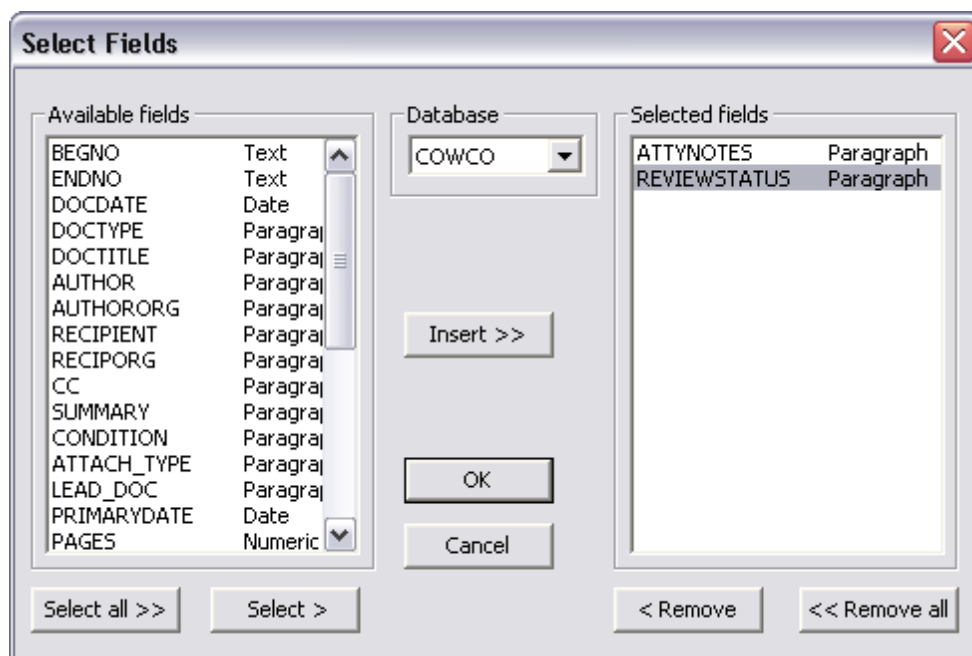
When the check box is selected, Concordance will copy the files and change the file path in the note to the other database's directory.

If you do not want Concordance to copy the attachments, leave the Copy attachments with notes check box blank.

8. In the **Fields** section, select one of the following options:

- **Use All Publisher Fields** Select this option when you want Concordance to run a full symmetric, bi-directional synchronization.
- **Use Selected Publisher Fields** Select this option if you only want to update specific fields during the synchronization.

Selecting the Use Selected Publisher Fields option opens the Select Fields dialog box.



 To select specific fields for synchronization:

1. Click the **Remove all** button to move all the publisher database's fields to the **Available fields** list.

By default, all fields in the publisher database are selected and listed in the Selected fields list.

The name of the database in the Publisher field in the Replication dialog box is displayed in the Database field in the Select Fields dialog box.

2. In the **Available fields** list, click the fields you want to synchronize and click the **Select** button.

Clicking the Select button adds the selected field to the Selected fields list.

To remove a field from the Selected fields list, click the field name in the list and click the Remove button.

3. Click **OK** to save your selections and close the **Select Fields** dialog box.

When the Use Selected Publisher Fields option is used in conjunction with the Subscriber Overwrites Publisher or Publisher Overwrites Subscriber option, you can have the data in a specific field written to only the publisher or subscriber database. Later, when you are ready to fully synchronize the records in the database, you can select the Use All Publisher Fields options to synchronize the databases.

-  When you select the Use Selected Publisher Fields option, records will not be marked as synchronized during the synchronization. The database records remain out-of-synch until a full synchronization takes place and all fields are synchronized using the Use All Publisher Fields option.

In the New Records section, the Append records to Publisher check box determines whether new records in the subscriber database are added to the publisher database during synchronization. The Append records to Subscriber check box determines whether new records in the publisher database are added to the subscriber database during synchronization. By default, both check boxes are selected.

9. If you are running a full synchronization between the two databases, select both the **Append records to Publisher** and **Append records to Subscriber** check boxes.

To add new records from the publisher database to the subscriber database, select the Append records to Publisher check box and clear the Append records to Subscriber check box.

To add new records from the subscriber database to the publisher database, clear the Append records to Publisher check box and select the Append records to Subscriber check box.

-  If you created a replica database from a query and you want to keep only the records from the query in the replica database, clear the Append records to Publisher and Append records to Subscriber check boxes, otherwise the full database will be appended to the replica database if appending is enabled.

10. If you are running a full synchronization between the two databases and you want

Concordance to mark records deleted or marked for deletion in one database to be marked for deletion in the other database, select the **Mark for Deletion** check box.

Remember, marking a record for deletion does not delete the record from the database. A record marked for deletion is not deleted from the database until the database is packed. For more information about deleting records, see Deleting records in Concordance.

If you do not want Concordance to mark the records for deletion, clear the Mark for Deletion check box.

11. To tag records that have been marked for deletion, select the **Tag Deleted Records** check box and type the tag name you want to use in the **Tag for Deleted Records** field.

If you do not want to tag records marked for deletion, clear the Tag Deleted Records check box.

12. To append or restore records that have been deleted, select the **Append/Restore Deleted Records** check box.

When the Append/Restore Deleted Records check box is selected, Concordance copies a deleted record back to the database it was deleted from, effectively restoring the record. This can only take place if it was not marked for deletion and packed from both databases. The record must still exist in one of the database to restore it.

Replicating to a backup copy of the database before packing is the best way to archive deleted records and keep a current backup.

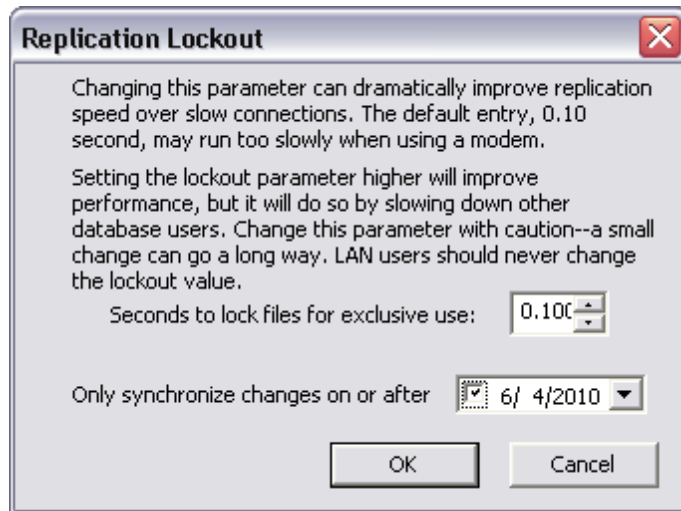
 When you synchronize databases with the Append/Restore Deleted Records check box selected, the deleted records are restored, but the restored records are not displayed in the database until the database is reindexed.

If you do not want to append or restore deleted records, clear the Append/Restore Deleted Records check box.

If you have a slow network connection, you may want to adjust the replication lockout parameter for synchronization.

13. To modify the replication lockout parameter, click the **Advanced** button.

Clicking the Advanced button opens the Replication Lockout dialog box.



■ **To adjust the replication lockout parameter:**

The replication lockout parameter is the time that replication holds the [database name].key file open for exclusive use. No other network user can access the file when it is in exclusive use. The Seconds to lock files for exclusive use field defaults to 0.10 seconds, which balances performance with file sharing. However, some wide area network (WAN) connections perform file and record locking very slowly. The default lockout parameter may be too small for reasonable synchronization performance.

Increasing the length of time replication keeps the file locked can produce dramatic improvements in replication speed over wide area networks. You probably will not need to change this parameter for replication on a local area network.

1. To increase the length of time replication keeps the file locked, thereby decreasing the total number of times it needs to lock the file, type or scroll to the applicable length of time.

With the Only synchronize changes on or after field, you can determine the date you want Concordance to start synchronizing the databases.

2. To set a date for synchronization, click the down arrow in the **Only synchronize changes on or after field** and click the date you want to use.

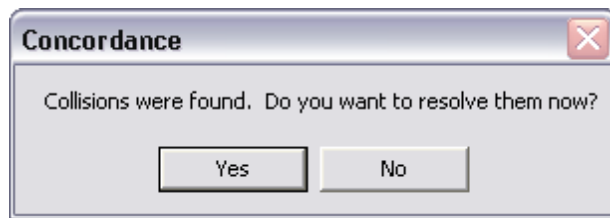
When you click a date, the date is displayed in the field with the check box next to the date selected. You can disable the synchronization date by clearing the check box next to the date.

3. Click **OK** to save your changes and close the **Replication Lockout** dialog box.

14. To save your settings in the **Replication** dialog box, so that the settings will be the default settings each time you open the **Replication** dialog box, click the **Save Settings** button.

15. Click the **Synchronize** button to start synchronizing the databases.

If any collisions are found during the synchronization, the following message is displayed:



Concordance checks for field data collisions and note collisions.

- ✎ New notes added after replication to either the original or replica databases will not cause a collision during synchronization. Only notes created in the replication process, that are then edited, will cause a collision when synchronizing.

16. To resolve collisions during the synchronization process, click **Yes**.

To resolve collisions after the synchronization process, click No, and then click the Done button to close the Replication dialog box.

Collisions do not need to be resolved during the synchronization process. You can resolve collisions later or choose to enter additional text in the primary database field to note the differing entries, and notify reviewers of the discrepancy to verify whose annotations are correct.

To resolve collisions after the synchronization process, see the Resolve Collisions after Synchronizing the Databases (Optional) section in this topic.

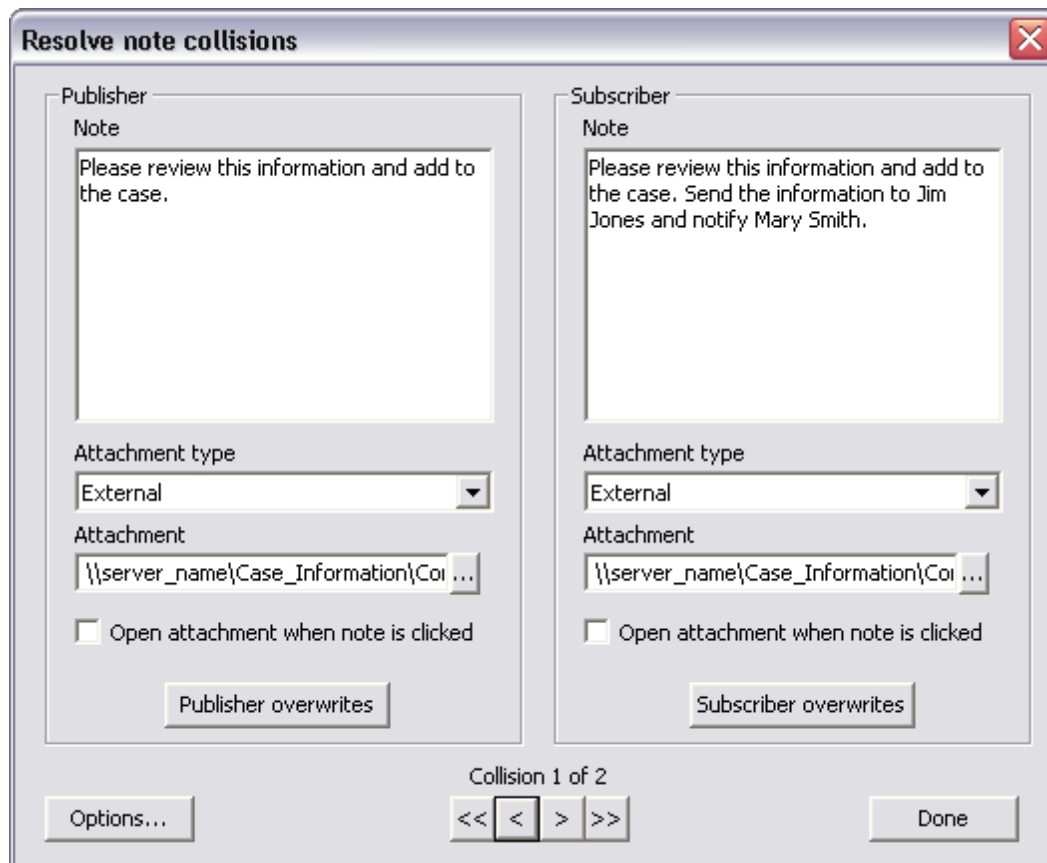
If Concordance finds field collisions, clicking Yes opens the first record containing a collision in both databases in the Edit view. The field names for the fields containing data collisions are displayed in red text. The Status bar at the bottom of the screen displays the number of records containing field collisions found during the synchronization.

Workspace Cowco	
BEGNO	00010071
ENDNO	00010071
DATE	09/15/1983
DOCTYPE	
TITLE	
TO	Goniff,JA
FROM	Darling,GH
PAGES	1
TEXT1	*** 00010071 *** nnn1nn71
TEXT2	
ATTYNOTES	Hot Document
LOADDATE	04/11/2008
EDITTRAIL	20080411 145010 Pac [FY200E-28] smithjd; 20080411 144649 Pac [ES2A1E-28] smithjd;
ACCESSID	28

00010071
00010071
09/15/1983
Goniff,JA
Darling,GH
1
*** 00010071 *** nnn1nn71
Smoking Gun
04/11/2008
20080411 145036 Pac [K6R2XA-1] smithjd; 20080411 144708 Pac [QVSOEV-1] smithjd;
1

☐ Publisher overwrites
 ☐ Subscriber overwrites
 ☒ Options

If Concordance finds only note collisions, clicking Yes opens the Resolve note collisions dialog box. The number of note collisions found during the synchronization is displayed at the bottom of the screen.



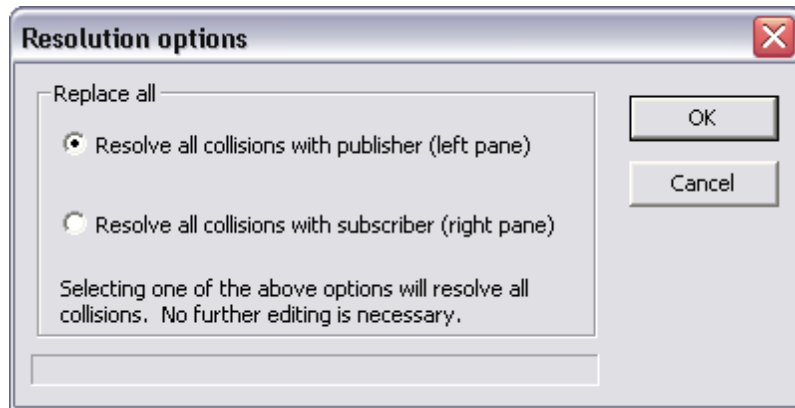
If Concordance finds both field and note collisions during synchronization, Concordance displays all field collisions first and then displays the note collisions.

■ **To resolve field collisions during the synchronization process:**

For field collisions, Concordance opens the record containing collisions in both databases in the Edit view. The field names for the fields containing data collisions are displayed in red text. The Status bar at the bottom of the screen displays the number of collisions found during the synchronization.

1. Do one of the following:
 - If you want the data in the publisher database's record to overwrite the data in the subscriber database's record, click the **Publisher overwrites** button.
 - If you want the data in the subscriber database's record to overwrite the data in the publisher database's record, click the **Subscriber overwrites** button.
2. To always use the data from the publisher's or subscriber's database for all the field collisions found during synchronization, click the **Options** button.

Clicking the Options button opens the Resolution options dialog box.



☐ **To define the resolution options:**

1. In the **Resolution options** dialog box, select one of the following options:
 - **Resolve all collisions with publisher (left pane)**
 - **Resolve all collisions with subscriber (right pane)**
2. Click **OK**.

When you click OK, the field data from the database you selected is used for all remaining collisions, and no further editing is necessary or possible.

When you finish resolving a collision in a record, then next record containing a collision is displayed.

☐ **To resolve note collisions during the synchronization process:**

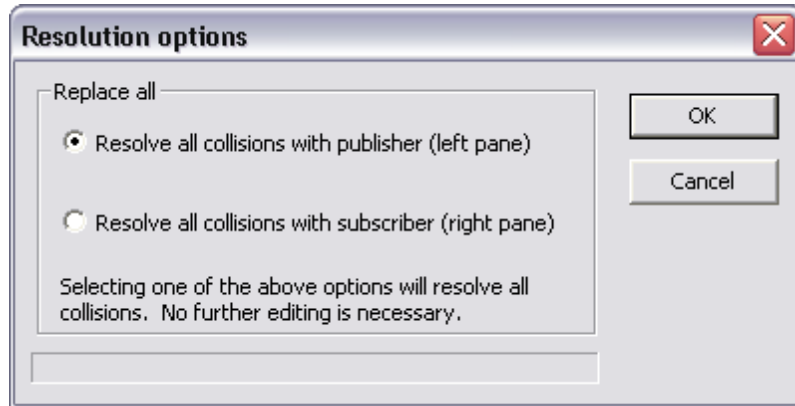
If Concordance finds any note collisions during synchronization, after the field collisions are resolved, Concordance opens the note collisions in the Resolve note collisions dialog box.

If you exit the field collisions view by clicking on another view, closing the database, or exiting Concordance before all field collisions are resolved, the Resolve note collisions dialog box will not appear.

1. Do one of the following:
 - If you want the note in the publisher database to overwrite the note in the subscriber database's record, click the **Publisher overwrites** button.
 - If you want the data in the subscriber database to overwrites the note in the publisher database, click the **Subscriber overwrites** button.
2. To always use the note from the publisher's or subscriber's database for all the

note collisions found during synchronization, click the **Options** button.

Clicking the Options button opens the Resolution options dialog box.



■ To define the resolution options:

1. In the **Resolution options** dialog box, select one of the following options:
 - **Resolve all collisions with publisher (left pane)**
 - **Resolve all collisions with subscriber (right pane)**
2. Click **OK**.

When you click OK, the notes from the database you selected are used for all remaining collisions, and no further editing is necessary or possible.

When you finish resolving a note collision, then next note collision is displayed in the Resolve note collisions dialog box.

When you finishing resolving all the collisions between the two databases, the following message is displayed:



17. Click **OK**.
18. If changes were applied to both databases during the synchronization, reindex both databases.

If changes were only applied to one of the databases, reindex the database that was modified. For example, if you have the publisher overwrite the subscriber database, you need to reindex the subscriber database.

For more information about reindexing databases, see Indexing and reindexing updates.

Resolve Collisions after Synchronizing the Databases (Optional)

During the database synchronization process, if Concordance finds collisions between the records in the publisher database and the subscriber database, you have the option of resolving the collisions during or after the synchronization process.

Collisions do not need to be resolved during the synchronization process. You can resolve collisions later or choose to enter additional text in the primary database field to note the differing entries, and notify reviewers of the discrepancy to verify whose annotations are correct.

You have two options for resolving collisions after synchronizing the databases:

Rerun the synchronization

If you need to work with your associates to resolve the collisions found during the synchronization, once you have the information you need to resolve the collisions, you can rerun the synchronization and resolve the collisions during the synchronization process.

Before rerunning the synchronization, reindex the databases. If you do not reindex the databases, you will not be prompted to resolve collisions when you rerun the synchronization.

Query the collision tag in both databases

If you need to work with your associates to resolve the collisions found during the synchronization, once you have the information you need to resolve the collisions, you can query both databases for the collision tag you created during the synchronization process and manually resolve the collisions between the two databases.

To resolve collisions using the collision tag:

1. In Concordance, open the original database and the replica database.
2. Run a query for the collision tag in both databases.

The collision tag is created in the Tag for Collisions field in the Replication dialog box and applied during the synchronization process. When Concordance finds a collision during the synchronization process, Concordance applies the collision tag to the record in both databases.

For more information about searching by tags, see Creating queries from tags and Querying tags and folders.

3. Compare the records tagged with the collision tag, and locate the field data and/or

note collisions between the same record in each database.

4. For field collisions, in the **Edit** view, make the necessary edits to resolve the collisions, and click the **Edit** view button or move to another record to save your changes.
5. For note collisions, click the note in the **Browse** view or right-click the note in the **Notes** task pane to open the **Notes** dialog box, make the necessary edits to resolve the collisions, and click **OK** to save your changes.
6. After resolving the database collisions, reindex the modified databases.

If changes were applied to both databases, reindex both databases.

If changes were only applied to one of the databases, reindex the database that was modified.

For more information about reindexing databases, see Indexing and reindexing updates.

Purge Old Events

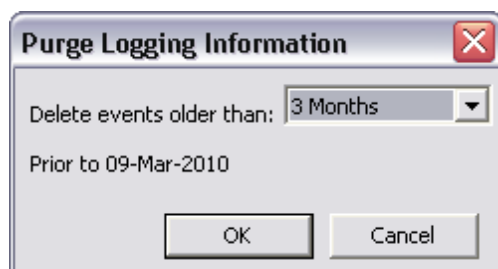
Replication makes use of a database tracking file, [database name].trk, to log edits, deletions, and other modifications for each database in a replication set. Many of the entries in the file are no longer needed when all replica databases have been synchronized. Unfortunately, Concordance has no way of knowing if all replica databases have been synchronized or even how many replica databases exist, so it cannot automatically purge old entries from the tracking file.

It is best practice for Concordance database administrators to purge old events from time to time as the databases are synchronized.

To purge old events from the TRK file:

1. On the **Tools** menu, point to **Replication**, and click **Purge Events**.

Clicking Purge Events opens the Purge Logging Information dialog box.



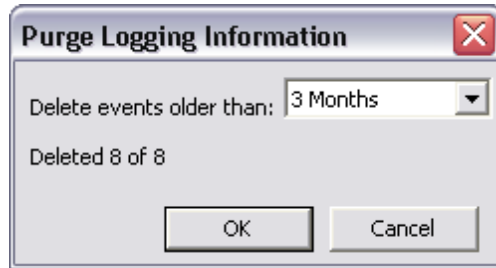
2. In the **Delete events older than** field, select the starting timeframe to purge events from the file.

You can select from one month ago up to a year ago. Concordance purges data older than the timeframe selected. After making your selection, the Purge Logging Information dialog box displays the specific date Concordance uses to delete events from the file. For

example, if 09-Mar-2010 is displayed, Concordance deletes any events with a timestamp before March 9, 2010.

3. Click **OK** to purge the events.

After the events are purged from the .trk file, the Purge Logging Information dialog box displays the number of events that were deleted.



4. Click **Cancel** to close the **Purge Logging Information** dialog box.

Replicating databases for working offline

You can make a copy of your images and existing redlines for a user to work offline. In order to create a copy of your images and existing redlines for working offline, you need to create the following:

- A replica of the [database name].dcb database file
- A copy of your images
- A replica of your [database name]-redlines.dcb redlines database file

To create a copy of the images, you need to create a production. When you create a production, an imagebase is created. You will want to name the imagebase's .dir file the same as your replicated database name and save it in the same directory folder.

When you replicate a redlines database, you will have a copy of the existing marks on the images and can create new ones.

Related Topics

Creating a production
Replicating databases

Managing Persistent Search

One method for storing search terms is to write the terms directly to a text file that is stored with the database. The Persistent Search feature searches for the terms included in the <dbname>_Persistent.txt file and highlights term(s) in each record where they are found.

Persistent Search, when enabled, remains active even after the results are returned. When new records are added to a database and the Persistent Search feature is enabled, simply reindex the database and then the new records are automatically included in the search results if the records meet the criteria.

If a query is run in conjunction with the Persistent Search enabled, the search results are returned for both and the terms are highlighted in the Browse view. The search query results are displayed in a different color than those found from the Persistent Search. The color settings are defined on the Searching tab of the Preferences dialog box, see Defining preferences.

- ✍ The Persistent Search feature may be run in conjunction with the Quick, Simple, Form, and Advanced Search queries to refine the search results even further. However, when combining search queries a maximum number of 255 characters is allowed. If a search is performed and then Persistent Search is activated make sure that the total number of characters does not exceed 255 to ensure the correct results are returned.

To add search terms to the Persistent Search file:

1. Navigate to the database's Persistent.txt file.

The .txt file is stored in the same directory as the database .dcb file.

2. Open the Persistent.txt file in any text editor program.

- ✍ Persistent.txt files can be opened with any text editor program, such as Notepad.

3. In the Persistent.txt file, type a search term, and then press **Enter**.

- ✍ The maximum number of characters per search term is 64.

4. Repeat step three for each term you want to include in the text file.
5. When finished, save the file and close the text editor.

Managing Imagebases

Managing CNV Image Base

About CNV image base management

The Concordance Image Base (CIB) database is a SQLite database that stores information on all native documents and image files in Concordance. The .cib file stores information such as folder path location, markup history, and preferences settings for Concordance Native Viewer.

As a best practice, make sure that all users are logged out of the database prior to using the Image Base Management tools.

Managing the Concordance Imagebase includes the following:

- Renaming/deleting media paths and folders
- Renaming/deleting media keys (aliases)
- Exporting the imagebase database to an OPT file
- Loading additional OPT files into an existing Concordance imagebase
- Calculating document page count

 If the Image Base Management tools are not available from the File > Administration menu, then you have not been given access privileges. If you need access, please contact your Concordance Administrator.

Renaming file paths and folders

After registering your media, if you receive an error message stating that Concordance Native Viewer is unable to open the corresponding document, you need to edit your folder paths. The folder path listed in the message box is the path stored in the Concordance imagebase that points to where your files are located so Concordance Native Viewer can open and display the document. You need to change the path to the directory location where your documents actually reside.

 Use caution when resetting folder paths as there is no undo function and changes are permanent. We recommend backing up the .cib file before performing this process or other imagebase management tasks.

To rename media paths and folders:

1. In Concordance, open the database you want to change the media path or folder.
2. From the **File** menu, click **Administration**, and then click **Image Base Management**.
3. In the **Image Base Management** dialog box, click the **Rename Media Paths and Folders** button.

The current file paths are listed at the top of the Rename Media Paths and Folders dialog box.

4. To specify a Target path, do one of the following:
 - From the **Root Paths** list, select an existing file path.
 - Enter a partial path in the **Target** field.
5. To set the path folder, do one of the following:
 - Click **Select Folder** and then select a new root path folder.
 - In the **Replace With** field, enter the new root path.

 File paths and folders are case-sensitive. Make sure the target and replace case match to ensure that the paths are replaced.

6. When finished, click **Replace**.
7. In the **New Root Paths** dialog box, do one of the following:
 - Click **Confirm** if the new path is correct.
 - Click **Cancel** to return to the Rename Media Paths and Folders dialog box and make any necessary corrections.

 The New Root Path dialog box displays the new path. If the path is displayed with red text, this indicates that the folder does not currently exist. It is recommended that you cancel the rename and choose an existing folder or create one prior to renaming the path.

8. When finished click **OK**.

Editing media keys

Your load file's alias format for should match the media (image) key information in the corresponding Concordance database. Concordance stores this key in order to reference the image for viewing in Concordance Native Viewer. For more information about the Image (Media) check box, see About fields.

You can use the Image Base Management feature to make changes to the media (image) aliases as needed.

 Make sure that when you rename or delete any media keys, you rename or delete the media key in the Concordance database.

 Unicode characters are not supported for media (image) key field names/

To edit media keys:

1. In Concordance, click **File > Administration > Image Base Management**.
2. In the **Image Base Management** dialog box, click **Browse** and then locate and open the

Concordance Image Base (.cib) file you want to edit.

3. Click the **Rename or Delete Media Keys** button.
4. In the **Rename or Delete Media Keys** dialog box, do any of the following:
 - Locate and click the media key from the media keys listed.
 - Enter the media key alias and then click **Search**.
5. In the **New Alias** field, enter the new media key, and then click **Save Alias**.
6. Repeat steps four and five for each media key you want to edit.
7. When finished, click **OK**.

To delete media keys:

1. In Concordance, click **File > Administration > Image Base Management**.
2. In the **Image Base Management** dialog box, click **Browse** and then locate and open the Concordance Image Base (.cib) file you want to edit.
3. Click the **Rename or Delete Media Keys** button.
4. In the **Rename or Delete Media Keys** dialog box, do any of the following:
 - Locate and click the media key from the media keys listed.
 - Enter the media key alias and then click **Search**.
5. Click **Delete**.
6. Repeat steps four and five for each media key you want to delete.
7. When finished, click **OK**.

Exporting a CIB file to OPT format

To make a backup of your Concordance imagebase you can export the database's .cib file to an .opt formatted file. The OPT file is a text file that contains the contents of the imagebase at the time of the export.

 If you plan to export the imagebase database more than once, make sure that you delete or rename the existing .opt file(s) prior to exporting as Concordance Native Viewer will not overwrite the file(s). The exported .opt file does not include markup history.

 Exported OPT files associated with a Concordance Native Viewer imagebase do not contain page count information. Therefore, if you are loading an exported OPT file into Concordance Image, you must reset the document breaks in Concordance Image for the images to load properly. See, Setting document breaks.

 To export a .cib file to an .opt file:

1. In Concordance, click **File > Administration > Image Base Management**.
2. In the Image Base Management dialog box, click the **Export CIB to OPT Format**.
3. Click **Add**, and then locate and open the Concordance Image Base (.cib) file you want to export.
4. In the **Output Folder** field, click **Browse**.
5. Locate and select the folder where you want to export the OPT file.
6. Click **Export**.
7. When finished, click **OK**.

 To export multiple .cib files to an .opt file:

1. In Concordance, click **File > Administration > Image Base Management**.
2. In the **Image Base Management** dialog box, click the **Export CIB to OPT Format** button.
3. For each CIB file you want to export, click **Add**, and then locate and open the Concordance Image Base (.cib) files you want to export.
4. In the **Output Folder** field, click **Browse**.
3. Locate and select the folder where you want to export the OPT files.
4. Click **Export**.
5. When finished, click **OK**.

Each CIB file is exported to a separate OPT formatted file, and placed in the designated folder.

Managing image base page counts

After loading a Concordance Native Viewer Image Base (CIB), the Create Page Count command should be executed to establish an accurate page count for viewing and printing documents and images. The Create Page Count calculates the total number of pages for each record and the total number of pages within the entire image base.

Anytime additional documents or images are added to the image base, the Update Page Count command should be run to ensure the page count is kept up-to-date for reviewers.

 To calculate the page count for an image base:

1. Concordance, click **File > Administration > Image Base Management**.
2. In the Image Base Management dialog box, click **Browse** and then locate and open the Concordance Image Base (.cib) file for calculating page counts.

3. In the **Page Count Settings** section, click the **Create Page Count** button.
4. When the processing is completed, click the **Close** button to close the Processing dialog box.
5. Click OK to close the Image Base Management dialog box.

 To update the image base page count:

1. Concordance, click **File > Administration > Image Base Management**.
2. In the Image Base Management dialog box, click **Browse** and then locate and open the Concordance Image Base (.cib) file you want update the page counts.
3. In the **Page Count Settings** section, click the **Update Page Count** button.
4. When the processing is completed, click the **Close** button to close the Processing dialog box.
5. Click OK to close the Image Base Management dialog box.

Recreate a Concordance Image Base (CIB)

When working with Concordance Native Viewer, you may need to delete and recreate an existing Concordance Image Base database (.cib). For example, you need to reimport all of your image information. This requires that you delete the existing .cib file prior to reimporting the image information. For more information about converting imagebases, see *Converting Imagebases*.

 When you delete a Concordance Image Base database (.cib), all markup history is lost. Make sure that you create a backup of your CIB file before deleting it.

Managing CI Imagebase

About managing imagebases

Just as a collection of Concordance files defines a database, scanned image files are stored together to form an imagebase. The imagebase includes the names and locations of the image files, and are managed within Concordance Image from the Imagebase Management dialog box.

Imagebase Management includes the following tasks:

- Scanning images

- Setting document breaks
- Resetting the directory path, if you move the files
- Registering a drive path
- Reviewing the .VOL files
- Editing a redlines database
- Exporting an imagebase to a log file
- Deleting an imagebase

Scanning images

If you do not have a corresponding image load file, you may want to register an imagebase by scanning images from a disk or directory source. Once the images are registered, you want to make sure that you create aliases and set the document breaks prior to document review.

Use the Register - Scan tab in the Imagebase Management dialog box in Concordance Image to scan directories and register applicable image files in the database. Registering an imagebase by scanning the images from disk is the easiest way of creating an imagebase. Unlike registering an imagebase from a log file, you do not store an *alias* in the Concordance image key field. Instead, you simply store the file name of the image.

✍ All file names must be unique no matter where they are located. In other words, you cannot register images from two CDs with the same file structure and file names even if the images are different. In order to create an imagebase from this scenario, you must create a .log file and use unique aliases to distinguish between images with similar file names.

✍ If the image represents the first image in a set of images, the exact value, 00001, must be the value in the image key field for your Concordance database for Concordance Image to find the image path and name in an imagebase. To eliminate any confusion, an alias is also matched with information that is used to synchronize Concordance and Concordance Image. Run the Create Alias from Filename.cpl. The images link automatically based on the Image field. Key and image fields are defined on the New or Modify dialog box. For more information about the key and image fields, see About fields.

To scan images:

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

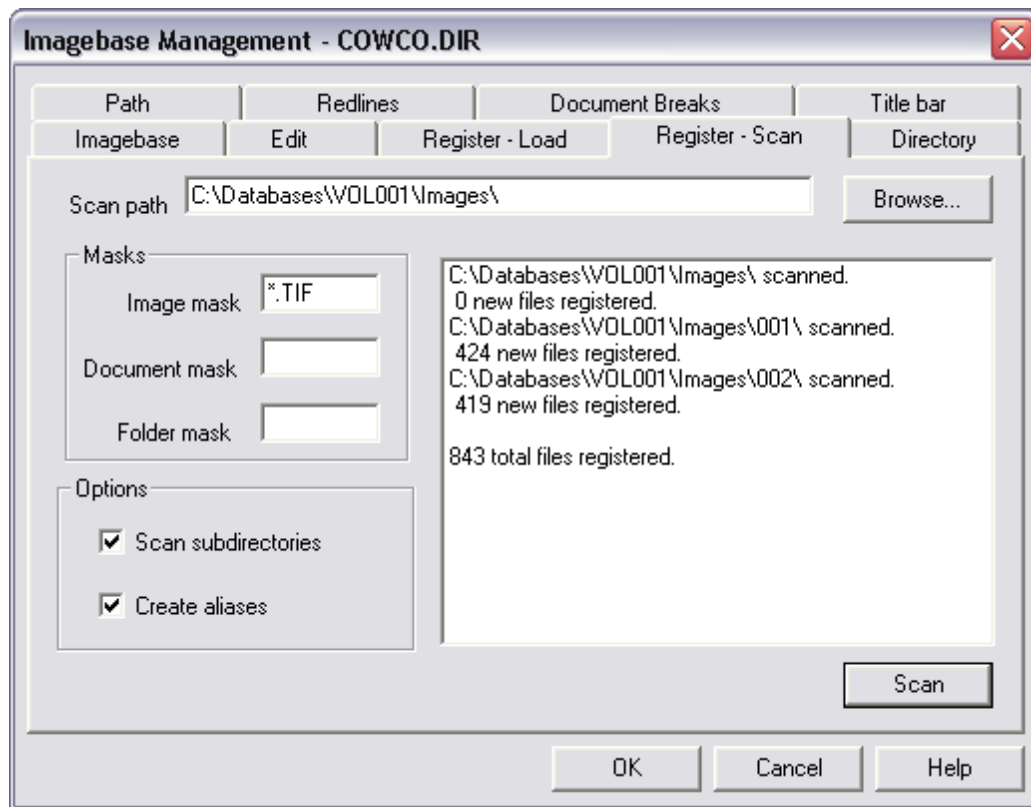
Clicking Imagebase Management opens the Open dialog box.

2. Navigate to and open the database's .dir file.

The .dir file is the database's imagebase file.

The Edit tab opens in the Imagebase Management dialog box.

3. Click the **Register - Scan** tab.



4. Click the **Browse** button, navigate to the directory path of the files you want to scan, and click **Open**.

Clicking Open adds the directory path to the Scan path field on the Register - Scan tab.

The Image mask field defaults to *.tif. Only the image files matching the file type entered in the Image mask field will be registered in the imagebase. For example, if *.tif is entered in the field, only the .tif files in the image directory in the Scan path field will be registered in the imagebase.

5. In the **Image mask** field, type the image file type (image mask) you want to register in the imagebase.

To register all images in the directory, type *.* in the Image mask field.

Document masks are used to mark document breaks. Any image matching the document mask entered in the Document mask field will be marked as a document break.

6. To use a document mask, in the **Document mask** field, type the applicable document mask.

Folder masks are used to mark folder breaks. Any image matching the folder mask entered in the Folder mask field will be marked as a folder break.

7. To use a folder mask, in the **Folder mask** field, type the applicable folder mask.

-  If you are using document and/or folder masks, make sure that the image also qualifies as an image by using an appropriate image mask.

8. To register the images with the image mask file type located in the subdirectory folders of the top-level folder in the **Scan path** field, select the **Scan subdirectories** check box.

If you only want Concordance Image to register matching images located in the top-level folder, clear the Scan subdirectories check box.

Concordance Image can automatically generate aliases for images. Running the register scan with the Create aliases check box selected creates aliases in your imagebase based on the field designated as the image field for the current database. A field is designated as the image field when the Image check box is selected for the field on the New or Modify dialog box in Concordance. For example, the BEGNO field is commonly set as the image field for databases.

During the register scan, Concordance Image can create aliases. To create aliases, before running the register scan, make sure that your image names match the corresponding record entries in the database's image field (for example, BEGNO record, XYZ00010002, matches the corresponding image file name, XYZ00010002.tif).

9. To create aliases for the image file during the scan, select the **Create aliases** check box.

If you do not want Concordance Image to create aliases, clear the Create aliases check box.

10. Click the **Scan** button to initiate the start the register scan.

When the image scan is completed, the Register - Scan tab displays the total number of files registered for each scanned directory.

Setting document breaks

You may find that you receive image files containing records that do not have preset document breaks or breaks that are not placed correctly or need to be changed. If so, you can set or change them in Concordance Image.

Concordance Image assumes that data is stored at a document level in each database, and marks the image specified in the image field as the document break. If the image field information is incorrect, you need to reset the document breaks. The Imagebase Management dialog box allows you to set document breaks in the imagebase based on the current Concordance query.

-  The Document Breaks tab in the Imagebase Management dialog box will not be active if you do not have an active Concordance database link to the imagebase.

To set document breaks:

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

Clicking Imagebase Management opens the Open dialog box.

2. Navigate to and open the database's .dir file.

The .dir file is the database's imagebase file.

3. Click the **Document Breaks** tab.

Imagebase Management - COWCO.DIR

Imagebase | Edit | Register - Load | Register - Scan | Directory

Path | Redlines | **Document Breaks** | Title bar

This page allows you to set document breaks by using the current Concordance query.

Database
C:\DATABASES\COWCO

Document in query | Image field
203 | BEGNO

☒ Reset all document breaks before proceeding

☒ Clear all page counts before proceeding

Set

OK Cancel Help

The Database field displays the path to the current Concordance database. The Document in query field displays the number of documents in the current Concordance query, and the Image field displays the field in the Concordance database that is designated as the database's image field. For more information about image fields, see About fields.

4. To reset all document breaks before creating new document breaks, select the **Reset all document breaks before proceeding** check box.

When the Reset all document breaks before proceeding check box is selected, any image marked as a document prior to processing is no longer flagged as a document break.

To reset the document breaks before proceeding, clear the Reset all document breaks before proceeding check box.

5. To clear all page counts before creating new document breaks, select the **Clear all page counts before proceeding** check box.

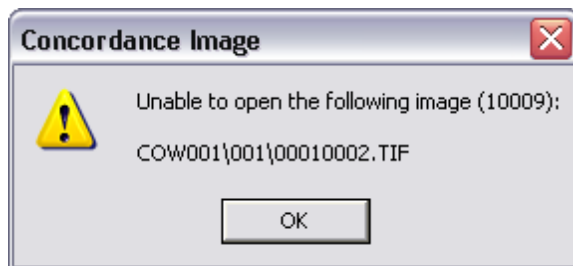
When the Clear all page counts before proceeding check box is selected, any image having a page count prior to processing will no longer have one. The page count value will be reset to 0.

If you do not want to clear all page counts before proceeding, clear the Clear all page counts before proceeding check box.

6. Click the **Set** button to reset all document breaks.

Editing the image directory path

After registering your images, if you receive an error message stating that Concordance is unable to open an image, you need to edit the directory path. The directory path listed in the message box is where Concordance Image is looking for your image files so it can open and launch the image. You need to change the path to the directory location where your images actually reside.

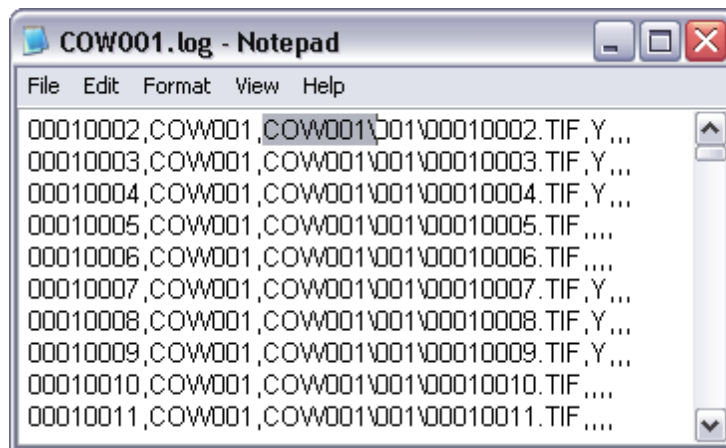


You can fix the imagebase directory path in three ways:

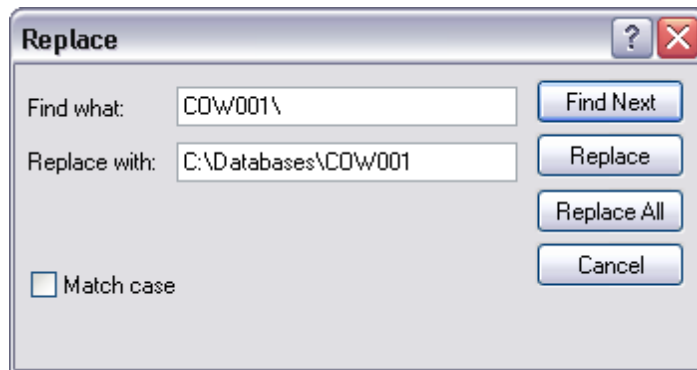
- Modify the directory in the image load file
- Modify the directory in Concordance Image
- Map images on drives

To modify the directory in the image load file:

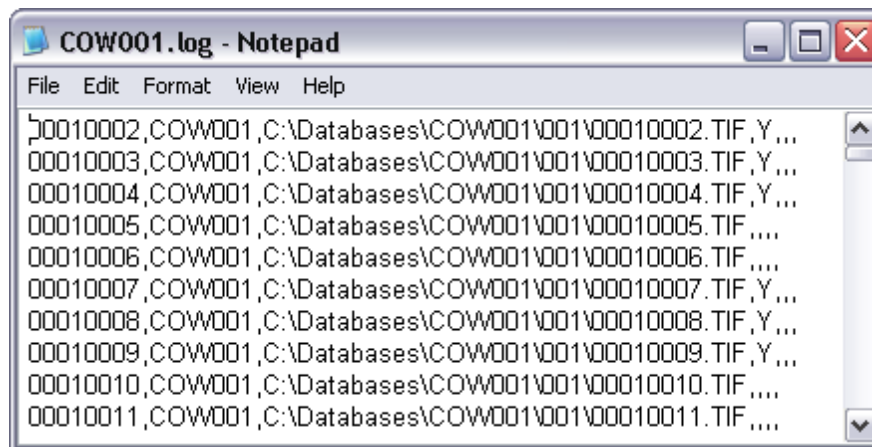
1. Navigate to and open the database's image load .log file in any text editor program.



2. Highlight and copy the file path that you need to edit.
3. Open the text editor's search and replace feature.
4. Replace the current path in the load file with the correct image path.



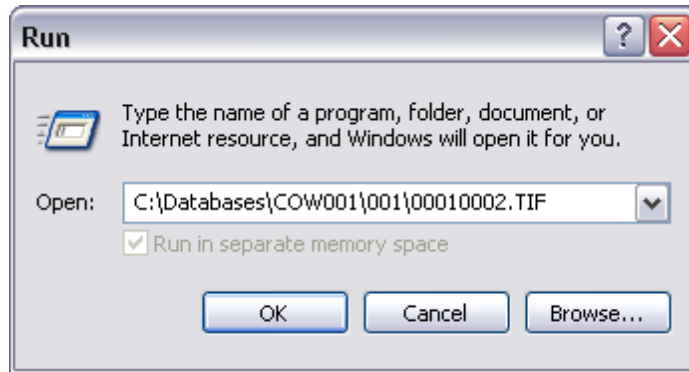
5. Now verify the image load file .log file now has the correct directory path.



6. Use the text editor's **Save As** feature to rename the updated file and save your changes.

Renaming the file ensures that you retain the original image load file.

7. To test the new directory path, from the **Start** menu, click **Run**, and then copy and paste the directory, including the file name of an image, into the Open field and click OK. If your image path update in the image load file was successful, the corresponding image automatically launches in Microsoft Windows.



To modify the directory in Concordance Image:

If you moved your database files, you need to reset the directory path where your images are stored on the network. To do so, you need to update the directory path on the Directory tab in the Imagebase Management dialog box.

 Use caution when resetting directory paths as there is no undo function and changes are permanent. We recommend backing up the .dir and .vol files before performing this process or other imagebase management tasks.

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

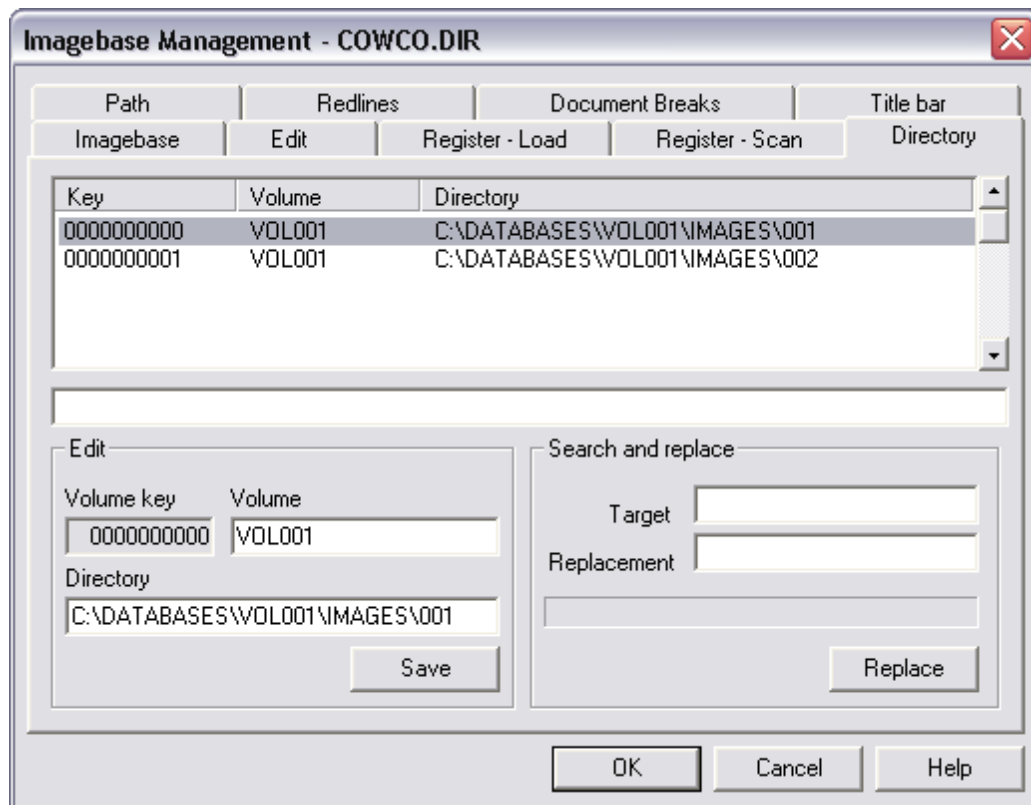
Clicking Imagebase Management opens the Open dialog box.

2. Navigate to and open the database's .dir file.

The .dir file is the database's imagebase file. The .dir file is located in the same directory as the database's .dcb file.

Th Edit tab open in the Imagebase Management dialog box.

3. Click the **Directory** tab.



The current image directory paths are listed at the top of the Directory tab. The Edit section of the tab is used to edit individual image directory paths, and the Search and replace section is used to globally search and replace directory path information throughout the imagebase.

4. To edit an individual directory path, click the applicable directory in the directory list.

Clicking a directory displays the directory's information in the Edit section.

Make the applicable edits in the Volume and/or Directory field and click the Save button.

5. To run a global search and replace, in the **Target** field type the directory text you want to search for and replace in the imagebase.

In the Replacement field, type the replacement text you want to use in the imagebase, and click the Replace button to redirect Concordance to your images.

⚠ If you use the search and replace function on the Directory tab, remember to type out the drive paths using punctuation: E:\. Otherwise the search and replace process replaces all instances of the letter *E* with the new target path.

6. When you are finished making the applicable directory path changes, click **OK** to close the **Imagebase Management** dialog box.

To map images on drives:

If you want to register your images without specifying a drive letter or UNC prefix, you can do so on the Path tab in the Imagebase Management dialog box. You can specify a prefix to all image paths for the current imagebase. Settings and specifications entered on the Path tab globally affect the imagebase, and Concordance assumes that all images are stored in the same location.

1. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

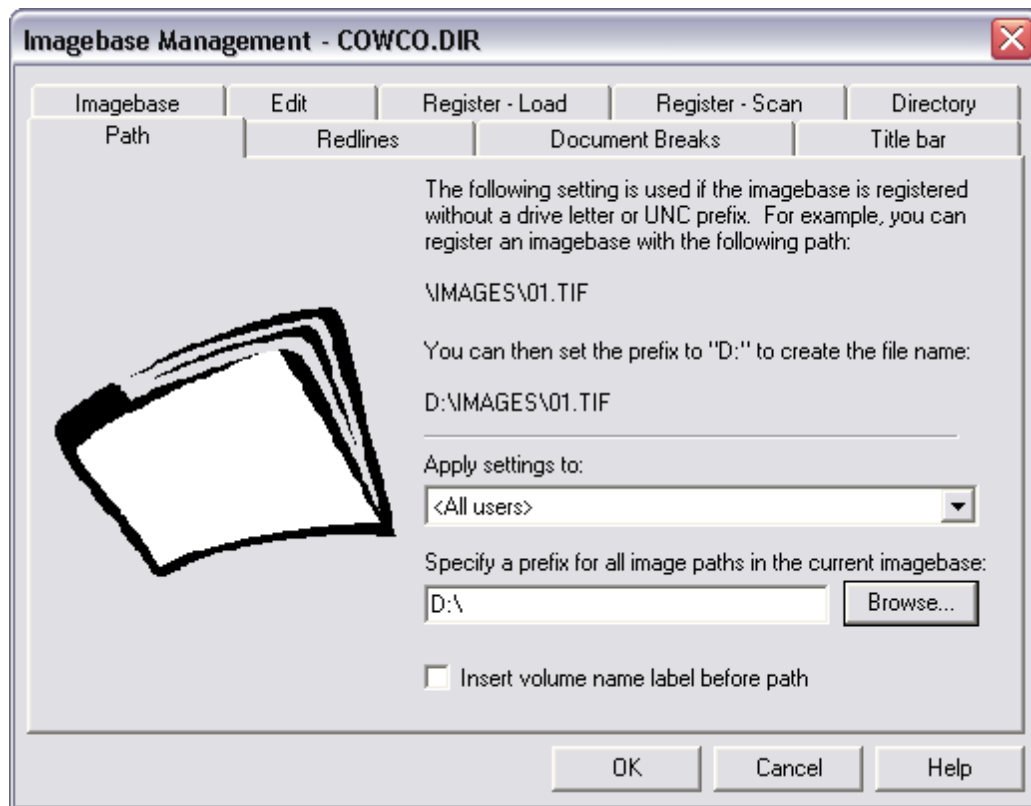
Clicking **Imagebase Management** opens the **Open** dialog box.

2. Locate and open the database's .dir file.

The .dir file is the database's imagebase file.

Clicking the Open button opens Edit tab in the Imagebase Management dialog box.

3. Click the **Path** tab.



4. In the **Apply settings to** field, select which user you want to apply the image path settings.

Concordance Image allows you to define the path settings for each individual user or for all users in the database. You can apply the settings to all the database users by selecting <All users>, or you can apply the settings to an individual user by selecting their user ID in the Apply settings to field.

5. In the **Specify a prefix for all image paths in the current imagebase** field, type the

drive letter you want to use for all image paths in the imagebase.

You can register an imagebase in Concordance Image without specifying a drive letter or UNC prefix. This gives you the flexibility to access the images from different workstations with different drive mappings. For example, you can register the following image on a CD:

`\IMAGES\CASE01\01\01.TIF`

Let's say user1 maps his CD-ROM drive to D: and user2 maps his CD-ROM drive to E:. User1 can set his prefix as D: and user2 can set his prefix to E:. There is no need to register one imagebase for each user. The same can apply to users on a network that have different drive mappings to servers. In fact, one user can map to the images using a UNC mapping while another can map to the images using a drive letter.

6. To register images on a CD jukebox, select the **Insert volume name label before path** check box.

If you do not want to register images on a CD jukebox, clear the Insert volume name label before path check box.

Adding a drive letter and selecting the Insert volume name label before path check box along with a path prefix, allows you to register images on a CD jukebox. Multiple users with different drive mappings (or UNC mappings) to the jukebox can use the same imagebase. With most CD jukeboxes, the CD volume name is placed in front of the root level directory of the CD. For example, you can register the following image on a CD with volume label, CD001:

`\IMAGES\CASE01\01\01.TIF`

Let's say a user maps the jukebox to drive J:. Selecting the Insert volume name label before path option maps the image to the following path:

`J:\CD001\IMAGES\CASE01\01\01.TIF`

7. Click **OK** to save your changes and close the **Imagebase Management** dialog box.

Loading images without load files

If you receive TIFF images without a load file, you have some options on how to prepare the images for review.

If the images relate to an existing Concordance database, they can be loaded into the database's imagebase in Concordance Image on the Register - Scan tab in the Imagebase Management dialog box. For more information about adding images to an imagebase, see Scanning images.

When you receive TIFF images without a load file and there is no database associated with the images, the most efficient solution is to contact the delivering party and ask them to send a load file for the images. If this is not possible or politically risky, you can create a simple load file and simple Concordance database to link to the images.

-  The process described below is designed for use with single-page TIFF files with unique names and a .TIF extension.

To load images without a load file:

 Create a Text File Containing the Image File Names

There are several good software utility programs that can be used to create a text file containing file names in a specific folder. CNET's Download.com has links and reviews of many products. Consider TreeSize and CopyPath. Refer to the software documentation or help system for instructions.

On a Microsoft Windows operating system, DOS commands can be used. This is often described as *porting a file list*.

To create a text file using a DOS command prompt:

1. Copy the images from the delivery media, such as a CD or thumb drive, to a folder on the computer network. Add the folder to your favorites in Microsoft Internet Explorer for easy access later.
2. On the **Start** menu, click **Run** to open the **Run** dialog box.
3. In the **Open** field, type **cmd** and click **OK**.

Clicking OK opens the cmd.exe command prompt.

4. At the command prompt, type the drive letter where the .tif images are currently stored followed by a colon and press Enter.

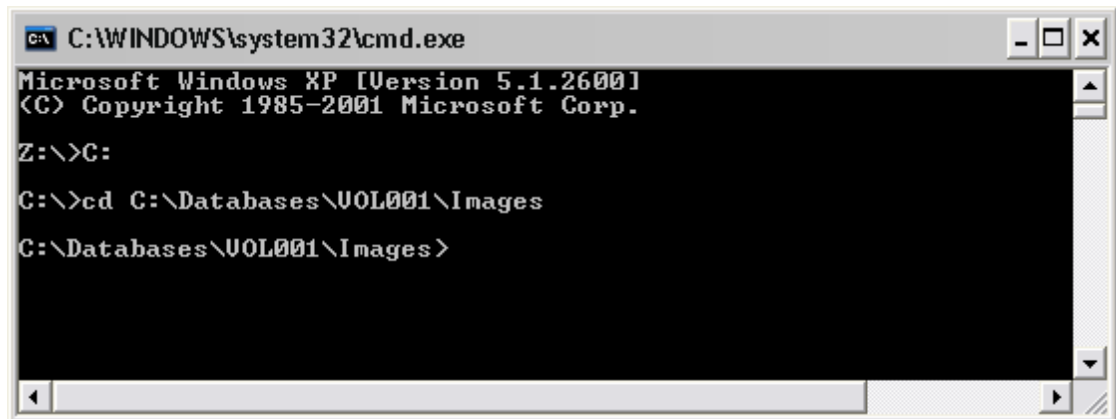
For example: C:

5. Type **cd [directory path to the folder containing the .TIF images]** and press Enter

For example: cd C:\Databases\VOL001\Images

The command prompt directory now reflects the folder where your images reside.

-  Commands are not case sensitive.



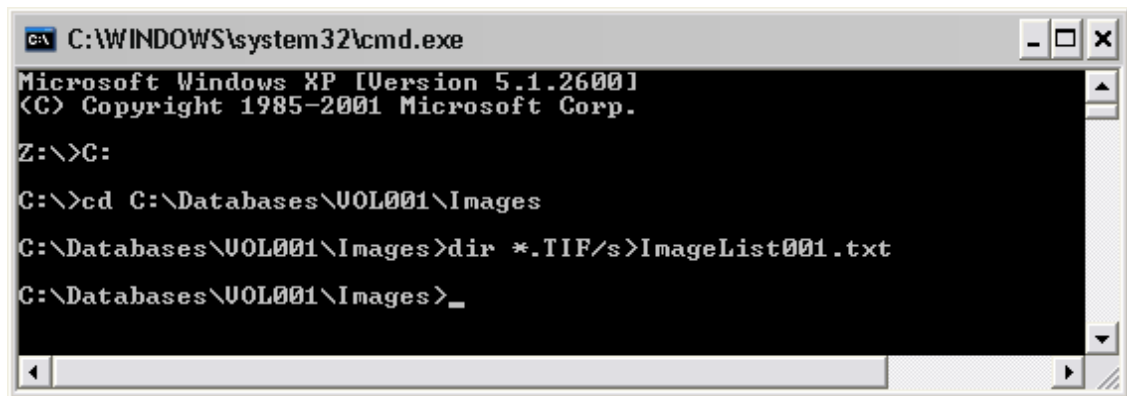
```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>C:

C:\>cd C:\Databases\UOL001\Images
C:\Databases\UOL001\Images>
```

6. Type **dir *.TIF/s>[image text file name].txt** and press Enter.

After pressing Enter, the .txt file is created in the same directory as the .tif images you entered. The .txt file contains a list of the TIFF file names from the directory you entered. You need to repeat this procedure for each image volume you have.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

Z:\>C:

C:\>cd C:\Databases\UOL001\Images
C:\Databases\UOL001\Images>dir *.TIF/s>ImageList001.txt
C:\Databases\UOL001\Images>_
```

7. When you are done creating the text files, type **exit** and press Enter to close the command prompt.

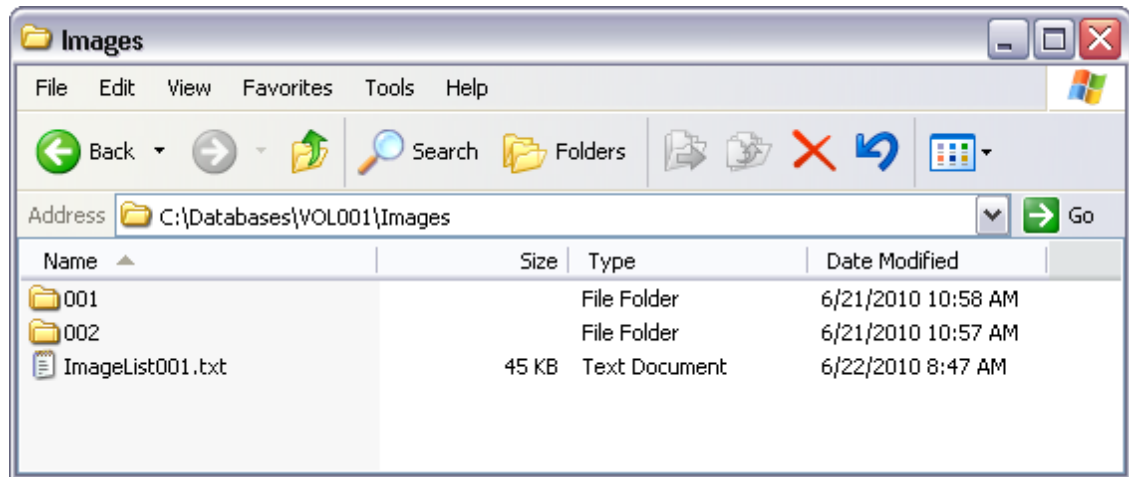
Create a Data Load File for the Images

After creating the text files for your image files, you need to create a data load file for the images.

To create a data load file for the images:

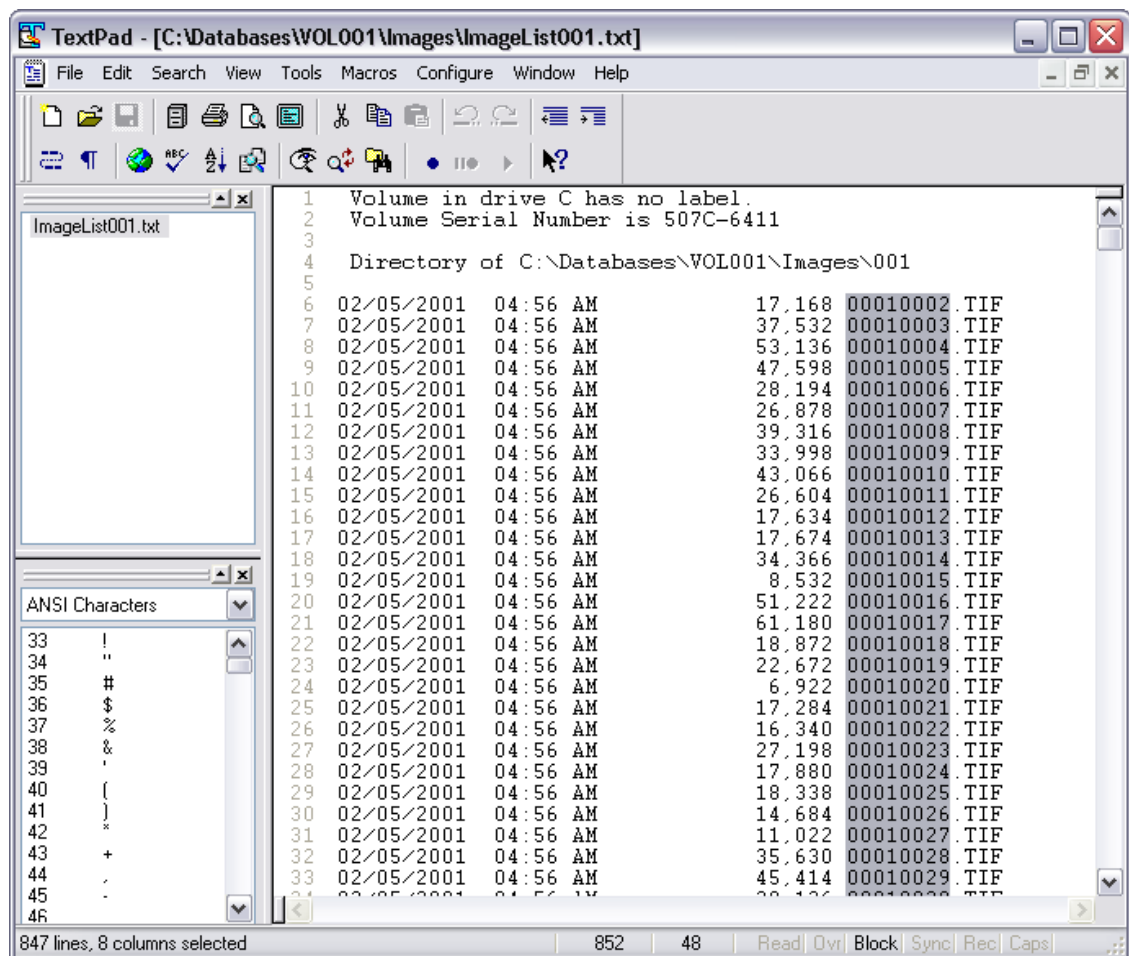
1. In Microsoft Windows Explorer, browse to the .txt file you created for the images.

The .txt file is located in the same directory as the TIFF images.



2. Open the .txt file using a text editor program.

Here is an example of an image .txt file in TextPad:



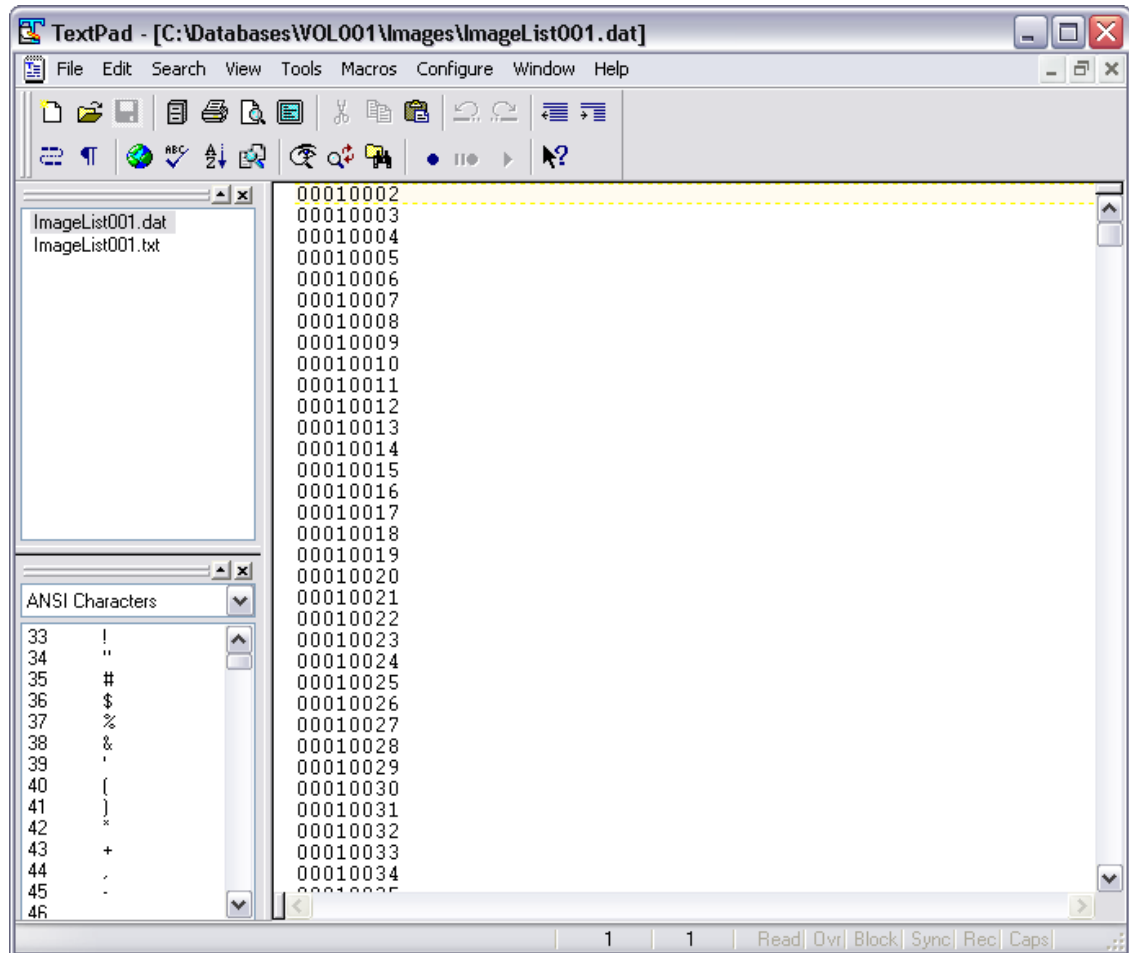
3. Highlight only the image file names in the .txt file and copy all the file names.

Do not include the .tif file extension when you are copying the image file names. If you are using TextPad or UltraEdit, the easiest way to copy only the file names is to use the block selection feature in the editor. For example, in TextPad, on the **Configure** menu, click **Block Select Mode** to turn on the block selection feature.

4. Open a new file in the text editor and save the new file as a .dat file.

The .dat file will be the data load file for the images.

5. In the .dat file, paste the image file names.



6. If you have more than one image volume and created multiple .txt files for the images, open the other .txt files, copy the image file names, and paste these image file names into the .dat file as well.

7. Add a carriage return at the end of the last record in the image list.

Concordance will not load the last record if the carriage return at the end of the record is missing.

8. Save the .dat file.

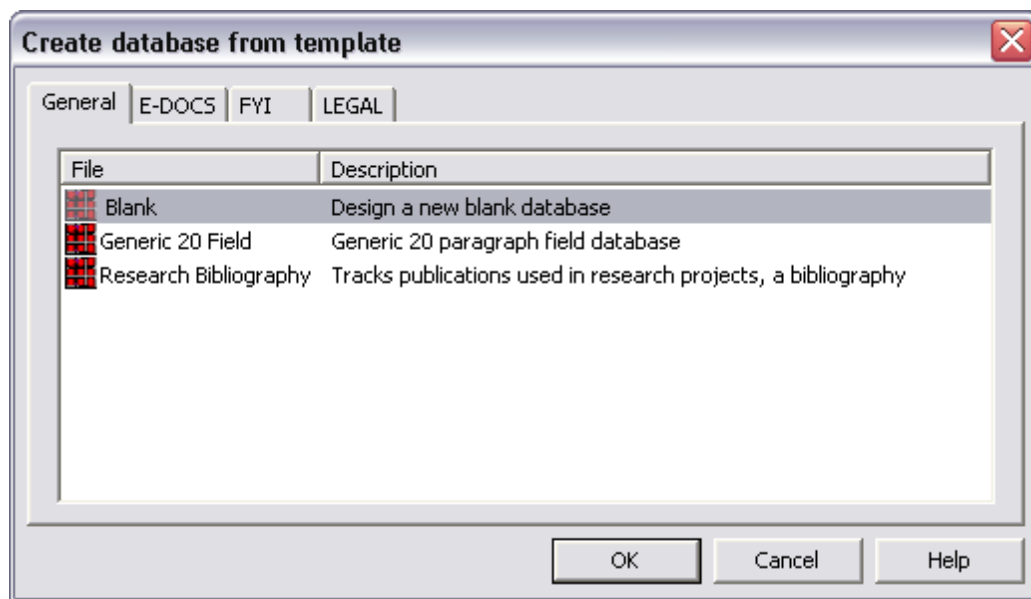
 Create a Database

After creating a data load file for the images, you need to create a simple database. The instructions for creating a database in this topic only include the steps necessary for creating a very simple database that can be used for importing a data load file created for images. For detailed information about creating a Concordance database, see [Creating databases](#).

To create a simple database for loading images:

1. In Concordance, on the **File** menu, click **New**.

Clicking New opens the General tab in the Create database from template dialog box.



2. Click the **Blank** template and click **OK**.

Clicking OK opens the Create Database dialog box.

3. Navigate to the directory where you will store your database, type the name of the database file in the **File name** field, and click the **Open** button.

Clicking the Open button opens the New dialog box.

Field Name	Type	Length
IMAGENAME	Text	20

Status
Documents: 0
Fields: 1

Punctuation: ',./'

Name: IMAGENAME
Type: Text
Length: 20
Places:
Format:

☒ Image ☒ Key ☐ Accession
☐ System ☐ Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

- The FYI Server and FYI Reviewer do not support user names, passwords, or database names containing characters in Unicode, such as Chinese or Japanese characters. Currently, FYI Server and FYI Reviewer only support user names, passwords, or database names containing single-byte characters, such as English characters.

If your organization uses FYI Server and FYI Reviewer, be sure to only use single-byte characters when creating user names, passwords, and database names in Concordance.

4. Click the **New** button to add an image field to the database.
5. In the **Name** field, type the name of the image field.
6. In the **Type** field, select **Text**.
7. In the **Length** field, type a field length number long enough to include all the characters in your image file names.
8. Select the **Image** check box.

An image field is used to link Concordance with an image viewer, such as Concordance Image or Opticon. The Image check box only needs to be selected for one of the database's fields. It is best practice to select the Image check box for the BEGNO field or it's equivalent.

If you are using Concordance Image as your image viewer, all you have to do to launch Concordance Image and link your imagebase files with your database records is open the database in Concordance and click the View image (camera) button in Concordance.

If you are using an image viewer that is not Concordance Image or Opticon, you will

need to configure the image view for Concordance on the Viewer tab in the Preferences dialog box. For more information, see *Defining preferences*.

Regardless of the image viewer you use, when you view a document associated with an image in Concordance, the corresponding image is displayed in the selected viewer.

9. Create any additional field you want to add to the database.

For more information about planning and creating your database fields, see the *Basic Database Fields* and *Basic Administrative Fields* tables.

For more information about fields in Concordance, see *About fields*.

10. Click **OK** to save your database.

 If you accidentally click the OK button or press Enter while entering fields in the New dialog box, you will close the dialog box. To reopen it, on the File menu, click Modify. Click the New button to add a new field to your database.

Clicking OK saves the data entered in the dialog box and saves the database. When you reopen the New dialog box in the database, the dialog box name is changed to the Modify dialog box.

Import the Data Load File into the Database

Now that you have created the data load file and database for the images, you are ready to import the data load file into the database.

To import the data load file into the database:

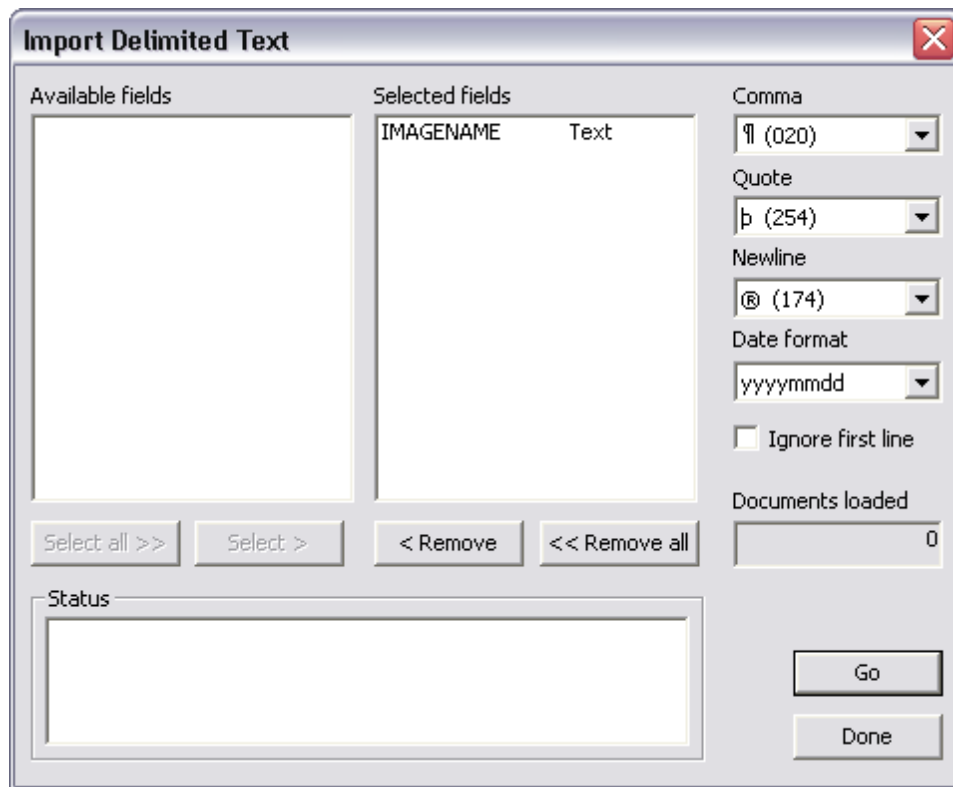
1. With the database you created open in Concordance, on the **Documents** menu, point to **Import**, and click **Delimited Text**.

Clicking **Delimited text** opens the **Import** dialog box.



2. Select **Import** dialog box and click **OK**.

Clicking OK opens the Import Delimited Text dialog box.



3. The image field you created is displayed in the **Selected** fields list.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance, the Date format field defaults to yyymmdd, and by default, the Ignore first line field is not selected.

When you are importing a data load file for images, you do not need to make any changes to the default settings in the Import Delimited Text dialog box.

4. Click the **Go** button to open the **Load delimited file** dialog box.
5. Navigate to and open the .dat file you created for the images.

The .dat file is imported into the database.

When the .dat file is imported, the number of documents that successfully loaded is displayed in the Documents loaded field. Verify that the number of documents matches the number of image file names in the .dat file.

The Status field also displays the number of documents loaded into the database.

6. Click the **Done** button to close the **Import Delimited Text** dialog box.

Scan the Images into the Imagebase

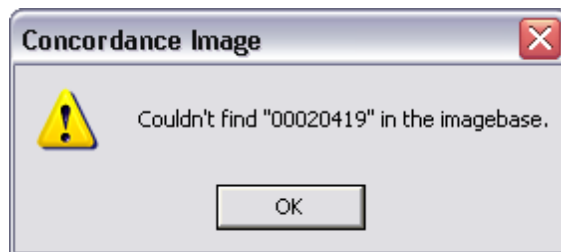
After the data load file is imported into the database, you need to create the imagebase and scan the images into the imagebase.

To create the imagebase and scan the images:

1. In Concordance, click the **View image** (camera) button on the Dynamic toolbar.

Clicking the View image button generates the imagebase for the database. Creating an imagebase creates the database's dir, .vol, and redlines .dcb file.

The first time you click the View image button, Concordance Image launches with an error message displayed.

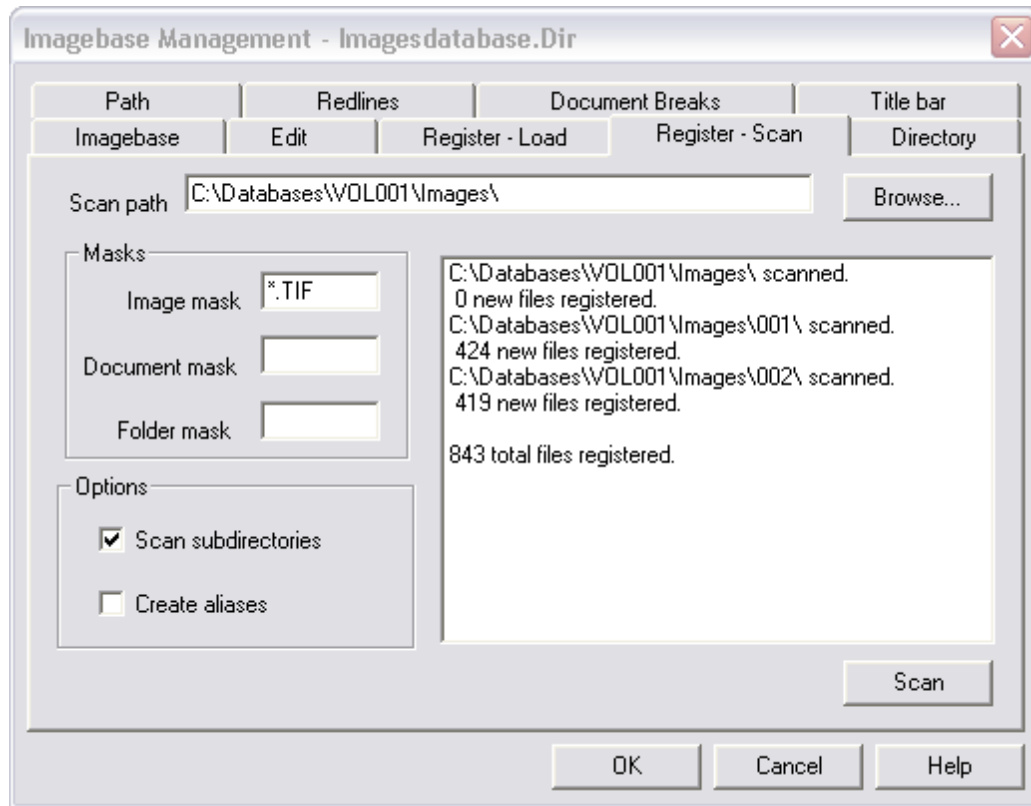


2. Click **OK** to close the message.
3. In Concordance Image, on the **Tools** menu, click **Imagebase Management**.

Clicking Imagebase Management opens the Open dialog box.
4. Locate and open the database's .dir file.

The .dir file is the database's imagebase file.

The Edit tab opens in the Imagebase Management dialog box.
5. Click the **Register - Scan** tab.



6. Click the **Browse** button, navigate to the directory path of the files you want to scan, and click **Open**.

Clicking Open adds the directory path to the Scan path field on the Register - Scan tab.

The Image mask field defaults to *.tif. Only image files matching the file type entered in the Image mask field will be registered in the imagebase. For example, if *.tif is entered in the field, only the .tif files in the image directory in the Scan path field will be registered in the imagebase.

7. In the **Image mask** field, type the image file type (image mask) you want to register in the imagebase.

To register all images in the directory, type *.* in the Image mask field.

8. Leave the **Document mask** and **Folder mask** fields blank.
9. If you want Concordance Image to register the images with the image mask file type located in the subdirectory folders of the top-level folder in the **Scan path** field, select the **Scan subdirectories** check box.

If you only want Concordance Image to register matching images located in the top-level folder, clear the Scan subdirectories check box.

10. Leave the **Create aliases** check box blank.
11. Click the **Scan** button to initiate the start the register scan.

When the image scan is completed, the Register - Scan tab displays the total number of

files registered for each scanned directory.

12. Click **OK** to close the **Imagebase Management** dialog box.

13. To test whether the images loaded correctly, return to Concordance and navigate to the next record.

The image associated with the current record should now display in Concordance Image.

For more information about scanning images, see *Scanning images*.

To set document breaks, see *Setting document breaks*.

Viewing the .VOL file

Administrators can review a database's .vol imagebase file.

To view a database's .vol file:

1. In Concordance, on the **Tools** menu, click **Manage List Files**.

Clicking Manage List Files opens the Lists tab in the List File Management dialog box.

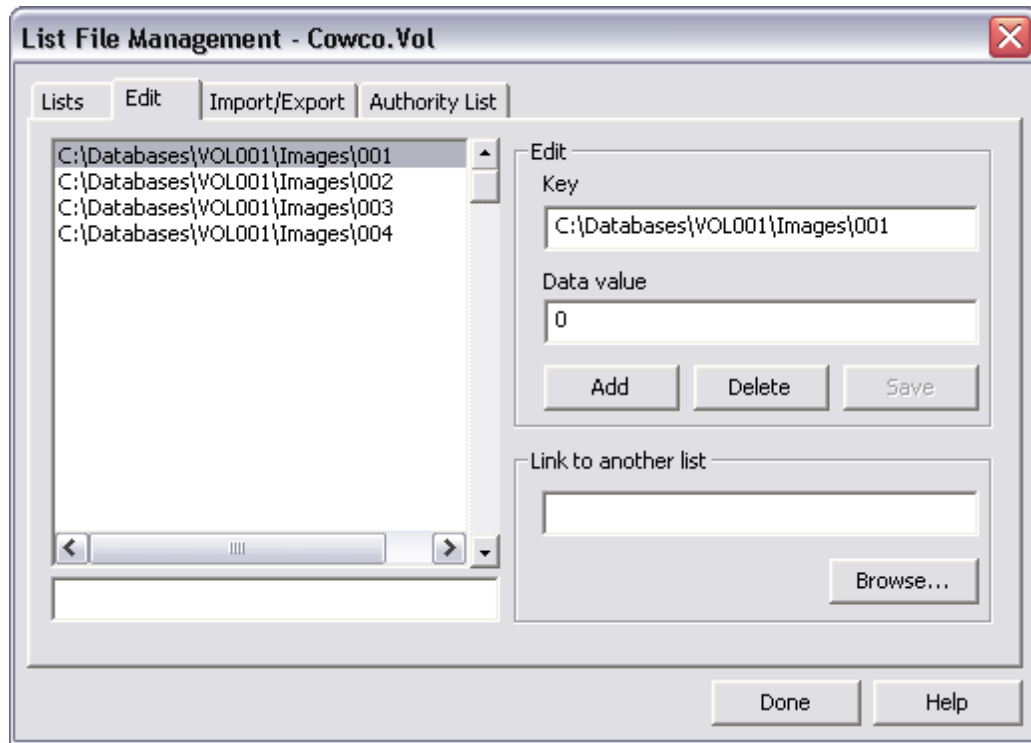
2. On the **Lists** tab, click the **Open** button.

Clicking the Open button to opens the Open dialog box.

3. Navigate to and open the database .vol file you want to review.

The selected .vol file's data is loaded into the List File Management dialog box.

4. Click the **Edit** tab to view the contents of the .vol file.



5. When you finish reviewing the .vol file, click the **Done** button to close the **List File Management** dialog box.

Editing redlines databases

Redlines databases are functional databases that track the coordinates for every redline applied to an image in the imagebase, and store the color and marking codes in a field also noting when it was created. You can view and modify redlines globally to change redaction text, highlight colors, and notes.

It's also a good idea to add an AUDITTRAIL field to the redlines database to track who created or modified redlines, and when. Add this field prior to reviewers annotating or redacting images, and be sure to validate this field in the Data Entry Attributes dialog box. For more information about the AUDITTRAIL field and other database fields, see About fields.

As an administrator, you may need to locate and remove a white highlight from a document or globally replace redaction text. Finding a white highlight in Concordance Image can be difficult. Using the Redlines database allows you to search on specific markings and change them directly in the database, which are then reflected on the image. Use the following Redlines Highlight Color Chart to locate the highlights in your image file.

You can also change the color of other redlines in the redlines database. To locate the color code for a redline, apply a redline in a specific color to a record in Concordance Image and search the [database name]-Redlines.dcb for the record that contains that color marking. The number associated with the color is displayed in the Color field in the redlines database.

Redlines Highlight Color Chart		
Color	Number	Use
Yellow	65535	Standard highlight color
White	16777215	Covering Bates numbers for production
Black	0	Covering text

 **Image Key Trick** – Image keys are merely Bates numbers for documents that appear in text. Highlight a Bates number in the Browse view in Concordance, right-click the highlighted Bates number, and click View Image to launch the document in Concordance Image.

For more information about editing records in a database, see [Editing records](#).

For more information about global replacements, see [Making global replacements](#).

To edit an individual record in a redlines database:

1. In Concordance, open the redlines database you want to edit.

Redlines databases use the following file naming convention: [database name]-Redlines.dcb.
2. To edit the redlines for an individual record in the database, navigate to the record you want to edit.
3. On the Standard toolbar, click the **Edit** button to open the **Edit** view and activate edit mode for the record.

Some fields may be gray because you don't have permission to edit these fields.

Workspace Cowco Cowco-Redlines

IMAGEKEY 00010004|00010004.TIF

XOFFSET 318

YOFFSET 1204

WIDTH 1816

HEIGHT 880

ORIENTATION 0

TYPE REDACTION

COLOR 0

TEXT Redacted

FONTNAME

XOFFSET	YOFFSET	WIDTH	HEIGHT	ORIENTATION	TYPE	COLOR	FONTNAME
318	1204	1816	880	0	REDACTION	0	
368	637	830	526	0	BOX	65535	
311	1438	1773	823	0	REDACTION	0	
297	1247	1879	667	0	BOX	65535	
21	21	355	298	0	NOTE	65535	
28	21	2417	3572	0	REDACTION	0	
226	503	2028	957	0	BOX	65535	
310	1506	1867	1481	0	REDACTION	0	

4. Locate the fields you want to edit.

- You can scroll or use the TAB, up arrow, or down arrow key to navigate between fields.
- See Edit Toolbar Buttons for more information about the record text editing options available in Concordance.

Some fields are distinguished by having a raised border and can be resized during data entry to make editing easier. To resize a field in the Edit view, select the bottom right corner of the field and drag it down the page to expand the field size.

5. Make your redline edits.

Concordance automatically saves your edits as soon as you navigate to another record or change your view in Concordance.

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 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**.

7. If Concordance Image is open while you are editing a record in the redlines database, to refresh the image you are viewing to include the edits you made to the record in the redlines database, in Concordance Image, navigate to the next record then return to the original record to view the redline edits.

📁 **To make a global edit in a redlines database:**

1. Back up your database before running the global replacement.

 Global edits are immediately saved and committed to a database. There is no undo option. We recommend that you always back up the database before making any global replacements.

For more information about backing up Concordance databases, see [About backing up databases](#).

2. In Concordance, open the redlines database you want to edit.

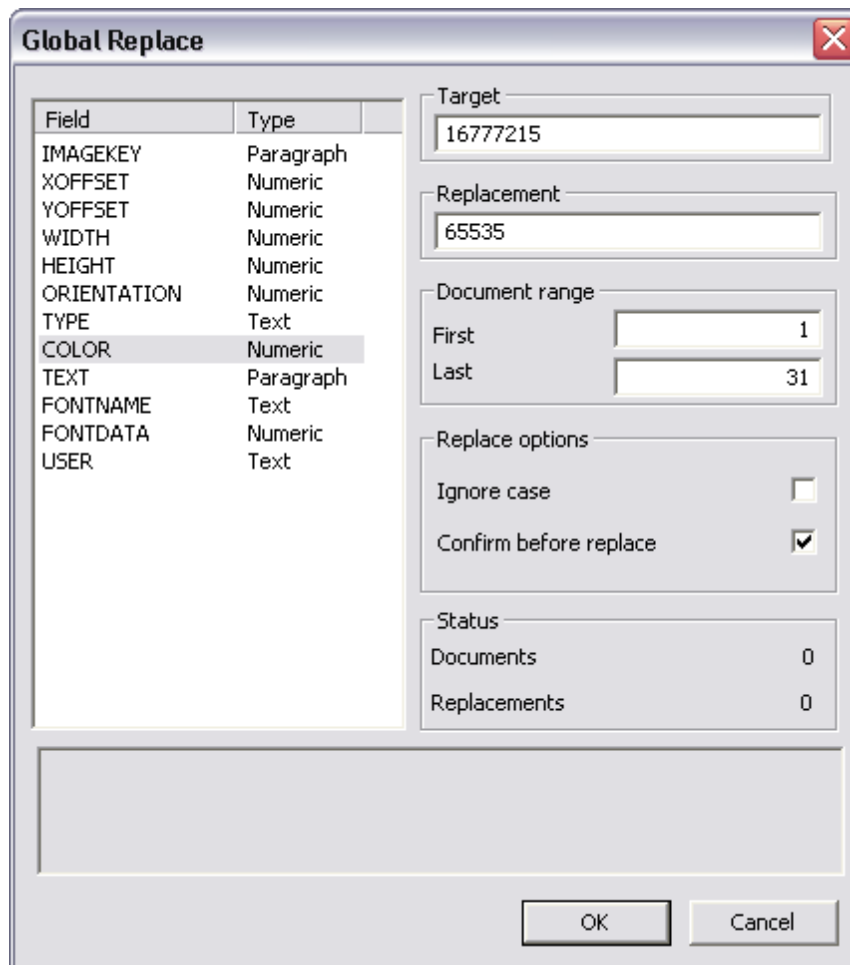
Redlines databases use the following file naming convention: [database name]-Redlines.dcb.

3. Run a search query to locate the records that need a global edit.

For more information about searching, see [Available search tools](#).

4. On the **Edit** menu, click **Global Replace**.

Clicking Global Replace opens the Global Replace dialog box.



The Global Replace dialog box is shown with the following fields and options:

Field	Type
IMAGEKEY	Paragraph
XOFFSET	Numeric
YOFFSET	Numeric
WIDTH	Numeric
HEIGHT	Numeric
ORIENTATION	Numeric
TYPE	Text
COLOR	Numeric
TEXT	Paragraph
FONTNAME	Text
FONTDATA	Numeric
USER	Text

Target: 16777215

Replacement: 65535

Document range:

First: 1

Last: 31

Replace options:

Ignore case: ☐

Confirm before replace: ☒

Status:

Documents: 0

Replacements: 0

OK Cancel

5. In the **Field** list, click the fields containing the text you want to replace.

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

During a global replacement, Concordance only searches the fields currently selected in the Field list.

6. In the **Target** field, type the text you want to replace.

7. In the **Replacement** field, type the text you want to add to the field.

If you are modifying a redlines color throughout the database, type the number associated with the redlines color in the Target and/or Replacements field to modify the color.

In the Document range section you can specify a document range within the current query to have Concordance only search and replace text within this range. The First field defaults to the first document in the current query and the Last field defaults to the last document in the current query.

8. In the **First** field, type the first document in the current query to search for the global replacement.

9. In the **Last** field, type the last document in the current query to search for the global replacement.

By default, the Ignore case check box is not selected. When the Ignore case check box is not selected, field text must exactly match the text in the Target field, including capitalization, before Concordance attempts a replacement.

10. To enforce case sensitivity during global replacements, leave the **Ignore case** check box blank.

To ignore upper and lower case lettering during global replacements, select the Ignore case check box.

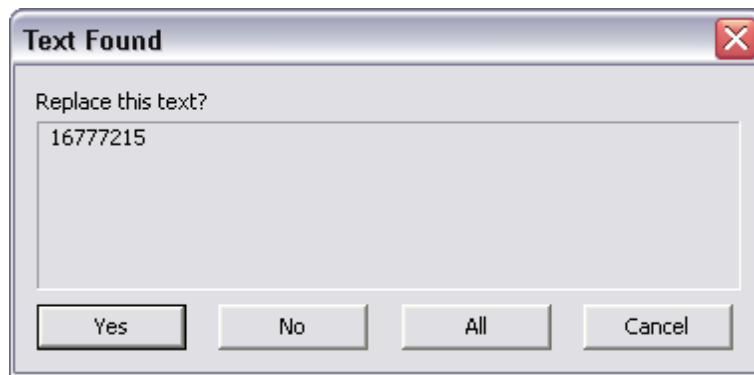
By default, the Confirm before replace check box is not selected. When the Confirm before replace check box is not selected, Concordance automatically searches and replaces the text in the documents in the current query without asking for confirmation before each replacement.

11. To make the global replacements with out confirmation, leave the **Confirm before replace** check box blank.

To request confirmation before replacing text, select the Confirm before replace check box.

12. Click **OK** to make the global replacements.

If the Confirm before replace check box is selected in the Global Replace dialog box, each time Concordance locates the text in the Target field during the global replacement, Concordance displays the found text in the Text Found dialog box.



13. In the **Text Found** dialog box, do one of the following:

- Click **Yes** to replace the text.
- Click **No** to ignore the currently found text and continue the global replacement process.
- Click **All** to replace all additional targets without confirmation.
- Click **Cancel** to cancel the global replacement process.

Once the global replacement process finishes, in the Status section, the Documents field displays the number of documents searched, and the Replacements field displays the number of replacements made. The field below the Field list and Status section, displays the replaced text.

14. Click the **Done** button to close the **Global Replace** dialog box.

Changes are immediately viewable. However, in order to run full-text searches for the edits in the records, 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 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.

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

16. If Concordance Image is open while you are running a global replacement in the redlines database, to refresh the image you are viewing to include any edits made to the record in the redlines database, in Concordance Image, navigate to the next record then return to the original record to view the redline edits.

Exporting imagebases to log files

Concordance Image enables you to export the entire imagebase to an image log file. The image .log file is a text file that contains the contents of the imagebase at the time of the export. If you export an imagebase multiple times, you have the option to overwrite the existing log file,

create a new .log file, or add the imagebase contents from the latest export to the end of the existing .log file.

 To export an imagebase to an image log file:

1. In Concordance Image, open the imagebase you want to export.

You can open an imagebase in Concordance Image by clicking the View image (camera) button in Concordance if the database associated with the imagebase is currently open in Concordance, or in Concordance Image, on the File menu click Open image, click OK to close the message, navigate to and open the imagebase's .dir file.

2. On the **Tools** menu, click **Export imagebase to log file**.

Clicking Export imagebase to log file opens the Export Imagebase dialog box.

The Imagebase field defaults to the directory and imagebase name of the current imagebase.

3. To export a different imagebase, click the **Browse** button to open the **Select Imagebase** dialog box, locate and open the imagebase .dir file.

The Log file field defaults to the same directory and has the file name for the new image log file.

4. To store the image log file in a different directory, click the **Browse** button to open the **Select log file** dialog box, navigate to where you want to store the .log file, type the file name in the **File name** field, and click **Save**.

The first time you export an imagebase the drop-down list in the Log file field is unavailable. Once an image .log file has been created, if you export the imagebase again, the drop-down list is available. You have the option of selecting one of the following options:

- Overwrite/create new file: Click Overwrite/create new file to overwrite the existing log file or if you modified the log file name in the Log file field and want to create a new log file.
- Append to file: Click Append to file to add the exported contents of the imagebase to the end of the existing log file.

5. Click the **Export** button to create the image .log file.

The log file is created in the directory displayed in the Log file field.

6. Click the **Done** button to close the **Export Imagebase** dialog box.

Deleting imagebases

The imagebase may need to be deleted for various reasons. If you need to reimport all of your image information, you will need to delete the imagebase.

If you need to remove unwanted entries from the imagebase, export the imagebase to a log file, remove the unwanted entries from the log file, delete the imagebase's .dir and .vol files, and then reimport the updated log file into Concordance Image.

 To delete an imagebase:

1. Close Concordance and Concordance Image.
2. Locate the imagebase's .dir and .vol files.
3. Rename or delete the imagebase's .dir and .vol files.

Renaming the .dir and .vol files creates a backup of the imagebase, in case you need to restore the imagebase later.

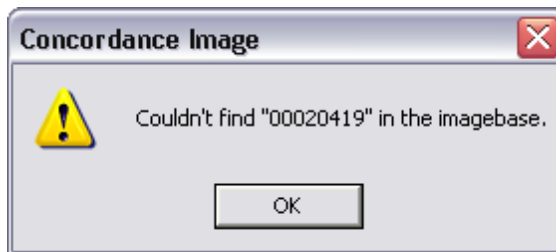
4. Create a new imagebase for the database.

 To create a new imagebase:

1. In Concordance, on the Dynamic toolbar, click the **View image** (camera) button.

Clicking the View image button generates the imagebase for the database. Creating an imagebase creates the database's .dir, .vol, and redlines .dcb file.

The first time you click the View image button, Concordance Image launches with an error message displayed.



2. Click **OK** to close the message.
5. Re-scan and register the images associated with the database.

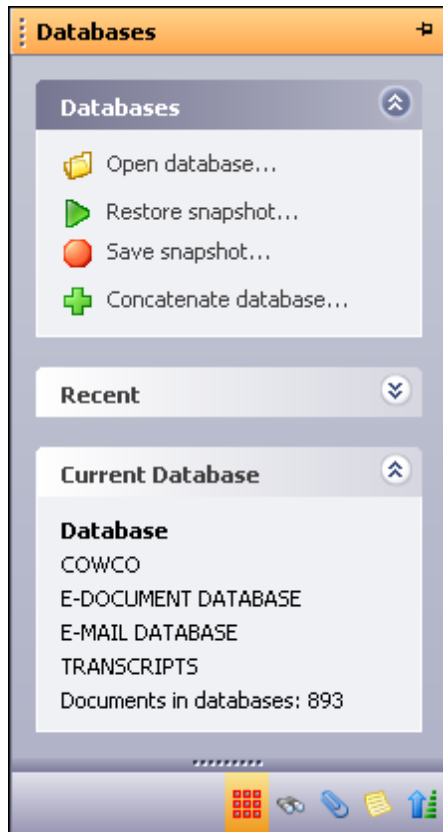
For more information about scanning and registering images, see [Scanning images](#).

Concatenating Databases

About concatenation

Concatenation is the joining together of two or more Concordance databases, allowing you to view multiple databases as if they were one database in Concordance.

Databases are concatenated using the Concatenate Database function in the Databases task pane.



With Database Concatenation You Can:

- Search up to 128 databases simultaneously. Concordance treats them as a single large file (not including Notes and Redlines databases), depending on network setup
- Open transcript and non-transcript databases together
- Use drop-down database lists on fields with selection functions
- Save indexing time when new records need to be imported into Concordance, by having a secondary database created and joined with the primary database
- Save maintenance time when indexing databases. With concatenation, you can perform full index updates offline and index multiple databases at the same time
- Automatically display tags from all databases
- Create field groups in INI files so reviewers can search multiple fields under one alias (copy into each .ini file for joined databases)

 Benefits of Concatenated Databases:

- Large record collections are often broken into smaller databases and concatenated for review.

This saves indexing time by reducing the number of records to be indexed, which increases processing speed. It also allows you to run multiple indexes on different workstations for all the databases, at the same time. You can also take one database offline for updates or maintenance while users still have access to review others.

- You can organize a record collection for review by creating databases based on document type, custodian, etc.

In Concordance, you can change the text color and font displayed in the Table view for each individual database in a concatenated set, allowing reviewers to quickly identify the type of record and its database, such as paper, emails, transcripts, or electronic documents – and who the custodian of the record is.

- Sometimes security is needed for a specific field, but not to all records.

Concatenation allows you to apply security to each database individually and retain the security settings for each database even though users are reviewing joined databases.

 Things to know about Concatenated Databases:

- Concatenation is not a structural change, records in each database stay the same
- Concatenation is not permanent
- Concatenated databases do not have to have any fields in common
- Saved .cat files are editable text-based files
- If a .cat file is saved in the same folder as the primary database's .dcb file, then the concatenated database launches automatically when the primary database is opened. Packing and database modifications are done in the primary database, indexing and reindexing are done on all the databases in the concatenated set in turn.
- Searches search each dictionary file one by one

 Unless you save a .cat file, concatenated databases are merged for only one Concordance session. The next time you open Concordance, you need to rejoin the databases to continue searching in this manner.

Designing concatenated databases

When large databases are split into multiple databases and then concatenated for ease of maintenance, all databases can be created with the same structure. The following Concatenated Database Sample table illustrates how this architecture is created.

As the administrator, this database design serves both you and the reviewer. The generic naming of the primary database prevents confusion for the reviewers because they can simply

launch the primary database (Columbia.dcb) without having to be concerned about multiple databases. The design also benefits you because databases are similarly named and the structure allows for ease of maintenance when indexing or reindexing is needed.

Concatenated Databases Sample 1	
Columbia.cat	Description
Columbia.dcb	Primary database with no records to associate with a .cat file.
Columbia1.dcb	Import first set of load files and link any images. Index and place database on network to begin review by concatenating to the primary database, Columbia.dcb.
Columbia2.dcb	Create a copy of the Columbia1 structure and load additional documents that were received. Index and concatenate to the primary database.
Columbia3.dcb	Repeat

In the format outlined in the table, you can index individual databases without having to take the all databases offline. This enables reviewers to continue working in other databases while you perform the maintenance. Simply notify the review team when records with Bates numbers x through y will be offline.

Organizing document types

There are various ways to organize the different types of documents imported into databases. Transcripts must be organized in a separate database because of the template structure required to import these files. In order to search a paper document database with transcript content, the two databases must be concatenated.

Concatenated Databases Sample 2	
Columbia Matter	Description
Hunter.dcb	Primary database with no records to associate with a .cat file.
Hunter Edoc.dcb	Database containing electronic documents.
Hunter Email.dcb	Database containing emails and attachments.
Hunter	Database containing transcripts.

Concatenated Databases Sample 2	
Columbia Matter	Description
Transcripts.dcb	

Hunter.cat	.cat file linking individual databases with the empty database, allowing viewers to launch them individually or as a concatenated set.

When various database types are concatenated and saved in a .cat file, all databases in the set automatically launch when the primary database is accessed in Concordance – as long as the .cat file has the same name as the primary database and is saved in the same directory folder as the primary database. This concept is useful when separating documents by source or custodian as well. Users can then choose to only view certain documents by custodian or document type by launching the individual database or review all records together by launching the primary database that has the associated .cat file.

Managing concatenated databases

When managing concatenated databases, be aware of the following:

- Index databases individually
- Reindexing is done on all the databases in the concatenated set in turn
- Pack databases individually
- Data imports only append to primary database
- Exports only use a selected database's field structure from a concatenated set
- Security is applied to databases individually
- Only run productions on individual databases
- Only replicate individual databases

 You can export from a concatenated set of databases as long as the field names are the same; however, the field type is inherited from only one selected database, so data may be truncated if the field size and data size of one of the concatenated databases exceeds the field size of the selected database structure.

Limitations for Concatenated Databases:

Using concatenated databases includes the following limitations:

- You can join databases with differing structures and they can be edited, sorted, and printed. However, the structures must be identical to use certain options such as Overlay and Export.

- You cannot replicate or create a production from a concatenated database.
- When using the Ditto feature, only documents in the primary database can be used for copying data.
- When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.
- When importing records into a concatenated database, records are updated when the fields of an imported record match an existing record. When the fields do not match, the imported record is appended to the main database, which is the first database in the concatenated set. However, when using the Overlay option, importing records with mismatched fields can cause a loss of data.
- Records cannot be packed from the concatenated database. They can only be packed from the original, unconcatenated database.
- Concordance displays an appropriate error message if you try to use one of the restricted options. Some options, such as Modify, operate only on the primary database in the concatenated list.

 Only files with the same file type can be concatenated together. For example, you can concatenate DCB files or FYI files but you can not concatenate DCB files with FYI files.

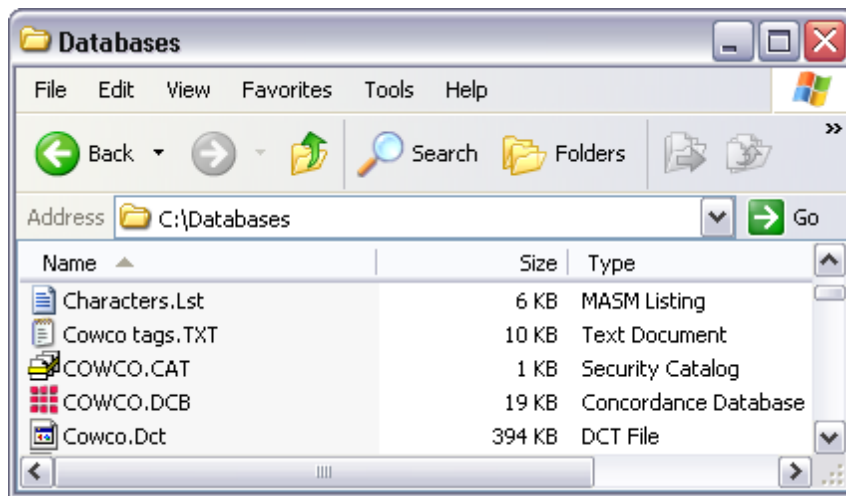
Security Guidelines for Concatenated Databases:

Setting up security for concatenated databases includes the following guidelines:

- Security settings need to be set up in each database. Setting security in a concatenated database set only affects the primary database.
- The user name and password must be the same for all databases in the concatenated set when security is enabled.
- When the user name and password in the primary database does not exist in a secondary database, and security is enabled, the concatenated database will not open. The user receives a message that they do not have access rights to the specific database.
- When a secondary database has security enabled and the primary database does not have security enabled, the user is prompted for the user name and password when using the secondary database. The user name and password entered becomes the user name and password for the concatenated database set.

Automatically Launching Concatenated Databases:

The concatenated text file is used to keep track of concatenated databases. The file contains the list of database names and their file paths for the databases in concatenated database set saved to the .cat file. If you open a database and Concordance finds a database .cat file by the same name in the same directory as the .dcb file, the databases in the list are automatically opened and concatenated. Since the Reindex function updates all actively concatenated databases, you can search, edit, and use the group as if they were one.



Indexing and reindexing concatenated databases

Edits and changes on various databases are occurring simultaneously by all users who are adding tags and comments, and editing records. Make sure that team members are updating the dictionary for searches by regularly reindexing all the databases in concatenated database sets.

When you Index a concatenated set of databases, Concordance indexes each database in the set. If you have access to multiple workstations, you can Index various databases simultaneously, saving time. When you Reindex a concatenated set of databases, each database in the concatenated set is reindexed, updating the whole concatenated database collection.

If a check mark is displayed next to Reindex on the File menu, the databases need updating. The check mark disappears from this setting after the process is completed. Collaborate with the review team lead to ensure that reindexing schedules coordinate with case review objectives.

Related Topics

About indexing databases
Indexing and reindexing updates

Joining multiple databases

When you concatenate a set of databases, the databases remain joined only for the duration of your current Concordance session unless you save the concatenated database set as a Concatenated (.cat) file.

Saving a .cat file allows you to easily reopen the same list of databases so that you can search across all the other joined databases in another session or restore saved queries that were previously run on the concatenated set.

There are some instances where setting up a concatenated set can affect other users. You should consult with your database administrator before saving a concatenated set of databases.

If you want to preserve your search history for the concatenated set, you need to save your queries during the current session while the databases are joined. You can restore the queries at a later time. When restoring saved queries for a concatenated database, you need to rejoin the databases before re-running the searches.

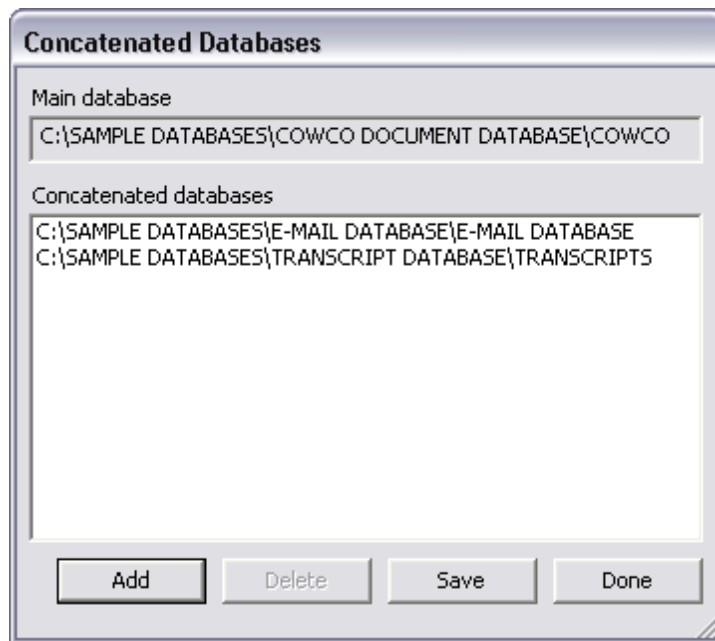
 When reviewing a concatenated dataset, all tags in all databases display in the Tags panel. If you apply a tag from one database to a record in another database, Concordance automatically writes that tag into the record's corresponding database.

For more information about saving and managing search queries, see [Saving search queries](#).

For more information about saving .cat files, see [Saving a concatenated file set](#).

To concatenate databases:

1. Do one of the following:
 - In the **Databases** task pane, click **Concatenate database**.
 - On the **File** menu, point to **Concatenate**, and then click **Add database**.



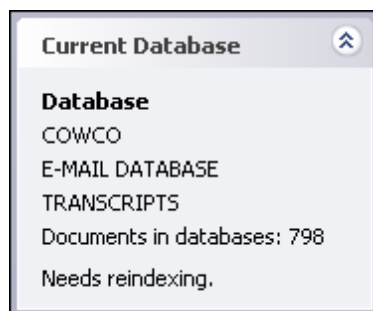
2. In the **Concatenated Databases** dialog box, click the **Add** button.
3. In the **Add Concatenated Databases** dialog box, locate and open the database file you want to join with your current database.

The file path is added to the Concatenated Databases box.

4. When finished, click the **Done** button to join the database files.

The Current Database panel in the Databases task pane displays all the concatenated databases, the total number of documents in the concatenated set, and whether the databases need reindexing.

You can also verify whether a database is concatenated in Properties dialog box.



Joined databases in a Concatenated database set only remain concatenated for the current session unless you save the concatenated database set. Once you close out of the database, the concatenation is removed from each of the databases in the set.

To remove the database concatenation, on the File menu, point to Concatenate, and then click Clear database.

To save the concatenated database set, see Saving a concatenated file set.

 The Table view layout corresponds to the active database you are reviewing. If you view a record from a concatenated database, your Table view layout changes to display the fields and sort order for that database. Remember to reference the Concordance Title bar to see what database you are viewing for a particular record.

 If you are reviewing multiple joined databases at a time, it may be helpful to change the font color or size in each database to help you differentiate between the databases at a glance.

Saving a concatenated file set

Always consult with your Concordance administrator before saving personal concatenated files to your hard drive or network to ensure you are following internal guidelines for this process. Saving .cat files can affect other users, so you need to exercise care and caution.

 If you name your personal concatenated file set's .cat file the same name as the primary database and store it in the same folder location as the primary database, then all the databases listed in the file launch automatically when the primary database is opened. This could create confusion and search problems for other team members.

You have two options for saving your personal concatenated files:

- Name the concatenated file as you wish and save it to your hard drive or network in a directory that is not the directory containing the primary database file.
- Name the file differently than the primary database and save it in the primary database's directory or another network or hard drive folder.

To save a personal concatenated file:

1. Join the databases you want to include in the concatenated file.

For more information about joining databases, see [Joining multiple databases](#).

2. After joining the databases, do one of the following:
 - In **Concatenated Databases** dialog box, click the **Save** button.
 - On the **File** menu, point to **Concatenate**, and then click **Save list**.
3. Browse to where you want to save the file, type the name of the .cat file in the **File name** field, and click **Save**.

Do not name the .cat file the same name as the primary database and place it in the same folder as the primary database. If the file has the same name and is saved in same folder as the primary database .dcb file, then all the databases listed in the .cat file launch automatically when the primary database is opened.

4. In the **Concatenated Databases** dialog box, click the **Done** button.

To open the .cat file, see Opening a concatenated file set.

- ✎ If you want to know which databases are joined together in a concatenated file, you can open the .cat file in Concordance, or you can open it in any text editor program to view the list of databases.

Opening a concatenated file set

When you open concatenated (.cat) files in Concordance, Concordance automatically opens each of the databases joined together in the file, and lets you search and review the databases as one database.

A concatenated file is an editable text file that you can open in any text editor program to review and edit the joined databases.

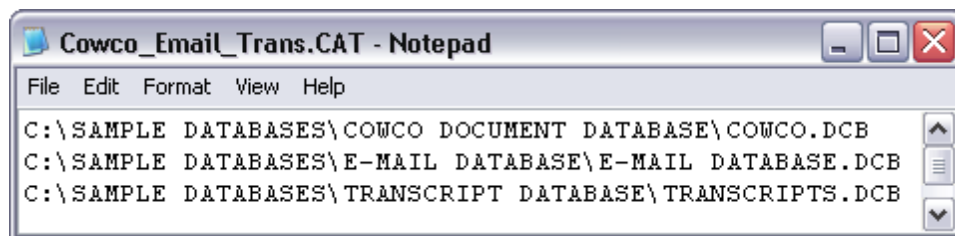
To open a concatenated file in Concordance:

1. In Concordance, on the **File** menu, point to **Concatenate**, and then click **Open list**.
2. Locate and open the .cat file.

When you open a .cat file, a new tab displays on the Workspace pane. The new tab name defaults to the name of the primary database in the concatenated file.

To open a concatenated file in a text editor:

1. Locate and right-click to select the .cat file on your hard drive or network.
2. Select **Open With** and select the text editor program.



The all the joined databases listed, along with their corresponding directory paths.

You can manually edit the .cat file, including cutting and pasting database directory paths directly into the text editor program and saving the file.

Deleting a concatenated file set

If you no longer want databases to be joined in a concatenated file or automatically launch each time the primary database is launched, simply delete or rename the .cat file in the directory you originally saved the .cat file.

Reviewing concatenated databases

When reviewing concatenated databases, it can sometimes be difficult to distinguish data from each database at-a-glance in the Table view. In the Table view, you can change the text font and color for each database and use table layouts to help you review concatenated databases.

Applying tags to concatenated databases is as simple as applying tags to individual databases. You can even add tags from one database to another database in a concatenated set.

Reviewing Concatenated Databases in the Table View

When you are viewing a concatenated database set, you can change the font color or size in the Table view for individual databases to help you differentiate between the databases at a glance.

DATE	GMT_DATE	MODDATE ▼	CREATIONDATE	PRINTD...	MESSAGE...	
00010278	00010280	10/13/1983	Correspondence	3	121	04/25/200
00010306	00010306	10/25/1983	Telex	1	126	04/25/200
00010319	00010319	10/20/1983	Correspondence	1	130	04/25/200
00020023	00020028	10/17/1983	Financial Report	6	166	04/25/200
Felten, Edward	10/03/1998	09:30:00 a.m.	I	1	25	0
Colburn, David M.	10/03/1998	09:40:00 a.m.	I	1	25	0
Decker, Stephen A.	10/14/1998	01:05:00 p.m.	I	1	25	0
Dertouzos, Michael	10/02/1998	09:40:00 a.m.	I	1	24	0
02/03/2003	02/03/2003	00/00/0000	00/00/0000	00/00/0000	0000000008	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000001	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000002	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000003	
02/06/2003	02/06/2003	00/00/0000	00/00/0000	00/00/0000	0000000004	

You can identify a database in a concatenated set in the following ways:

- Reference the Concordance title bar for an individual record's database and document name
- Reference field names for each database displayed in the Table view
- Change the font color and size for each database in the Table view

When you are searching data on multiple databases, the query results from a same name field intermingle in the Table view. The easiest way to distinguish between database information in the Table view is by font color and size.

Example: If each database has a same name DATE field, you can run a search on this field

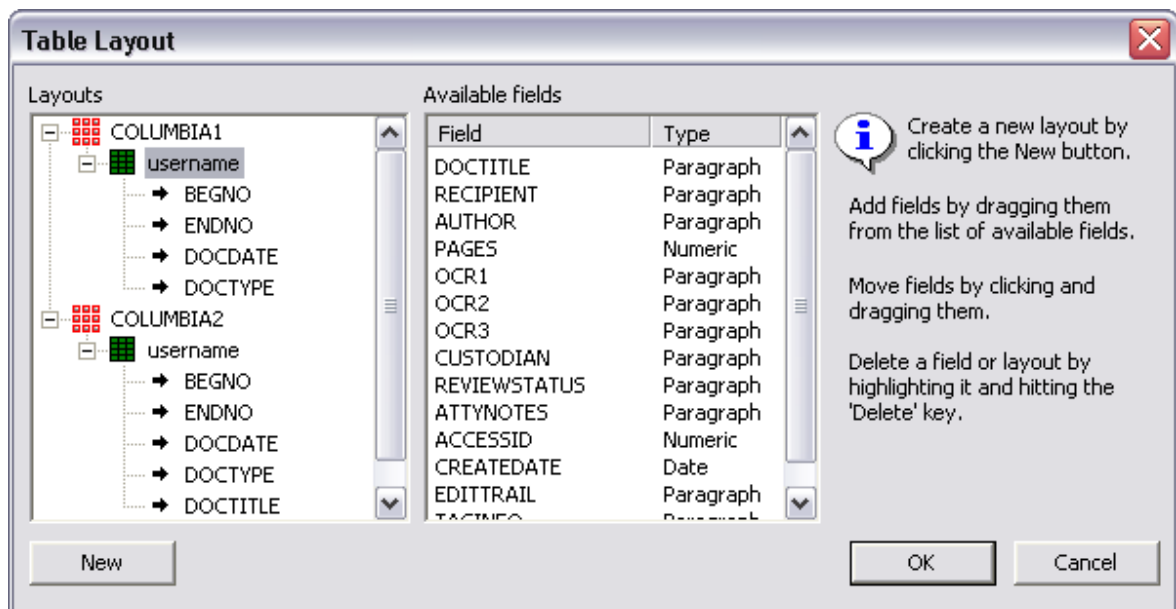
to gather subsets of documents by date.

date = 10/??/1983,10/??/1998,02/??/2003

This query located all documents within three different databases with a date of October 1983, October 1998, and February 2003. As shown in the example above, the Table view listings the black query results are from a paper database, the purple results are from a transcripts database, and the blue results are from an e-mail database.

Reviewing Concatenated Databases Using Table Layouts

You can also adjust your Table view layouts if field names are similar to sort across the joined databases. Each concatenated database will be listed in the Table Layout dialog box with private and any public layouts that have been created. You will need to manually rearrange fields to have them display in the same columns for sorting purposes.



 Copy the .LAYOUT file from one database to other concatenated databases to use the same table layouts in the Table view.

Tagging and Concatenated Databases

When databases are concatenated, all tags from both databases are displayed in the Tags task pane. If a reviewer applies a tag from one database to a document residing in another database, the tag is then added to the database where it never existed before.

Saving searches in concatenated databases

When searching concatenated databases, Concordance searches across all concatenated databases but because it searches each dictionary file one by one, searches may take a bit longer.

Saving queries executed on concatenated databases is the same process as saving them when reviewing one database at a time. All searches from all databases in the concatenated set are saved. Query files are stored in a .qry file, and can be restored on a concatenated set as you would a single database. You just need the databases to be joined when you save the query and when you re-run the query. Re-running the queries on a concatenated database set gathers any updates made since the last time any database was reindexed.

Related Topics

Saving search queries
Running previous search queries

Adding field groups to the INI file

You or reviewers may want to search across multiple data fields at the same time without having to construct a long search query.

Writing field groups directly to an .ini file allows you to use an alias name to search across multiple fields at the same time without having to construct a long search query.

Example: Aliasname = fieldname1, fieldname2

ALLDATES = DATE, DOCDATE

By creating an alias field named ALLDATES and associating it with all various date fields from a concatenated database set, users can search all date fields without having to modify date field names in each database. You can also create a field group for data fields in a non-concatenated database.

✍ The CREATEDATE and CREATIONDATE fields, or their equivalents, cannot be included in a field group because of the validation settings applied to them.

✍ Field groups written directly into an .ini file will also save into a Concordance database template.

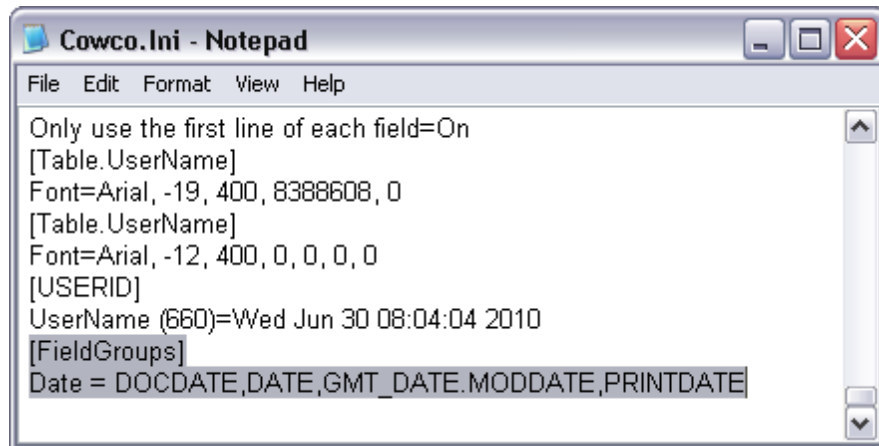
To add a field group to the .ini file:

1. In Microsoft Windows Explorer, navigate to the database .ini file you want to add a field group.

The .ini file is stored in the same directory as the database's .dcb file.

2. Right-click and open the .ini file in any text editor program.
3. Scroll to the bottom of the file.
4. In the next line after the last record, type **[FieldGroups]** and press Enter.
5. Type the Aliasname = fieldname1, fieldname2, fieldname3.

For example: Date = DOCDATE,DATE,GMT_DATE,MODDATE,PRINTDATE



You can add as many fields as you need to the field group.

6. Save the .ini file.
7. To test the field group you created, in Concordance, run a search for the field group alias you created.

For example: Date = ??/??/1982, ??/??/2000.

Your search results should include the applicable data from the fields within the field group you created.

To use a field group for concatenated databases, add the same field group to the other databases in the concatenated database set. When you search the concatenated database set, Concordance searches the all the fields in the field group in each of the databases in the concatenated set.

Printing from concatenated databases

When printing from a concatenated database set, you have the option to show or hide certain fields.

If you are printing a standard report in Concordance, you need to designate the database you

are printing from on the Fields tab in the Print documents dialog box. To open the Print documents dialog box, click the Print button on the Standard toolbar. You can also select the fields you want to print and can arrange the field order for printing on the Fields tab.

For more information about printing standard reports, see [Printing standard reports](#).

Exporting Data

About exporting data

Concordance offers a variety of options for exporting data in order to back up databases or save data into a format that can be imported into another database. Data exports are often required when there is a need to share data with other parties or for document production.

In Concordance you can export:

- As a Concordance database
- To an OPT file for use with Concordance Native Viewer
- To a delimited text file
- To a database structure for creating a database template
- Database transcripts into .PCF or delimited text files

Exporting data covers two scenarios:

- Exporting data for backup files and internal case review
- Producing images and information for third parties or opposing counsel

Related Topics

About Productions
[Exporting imagebases to log files](#)

Exporting databases

When you export a Concordance database, you have the option to export to an existing database or to create a new database. The export includes every record in the current query, in the sort order they are listed. By default, all fields, data, and tags, are also exported, but you also have the option to select only specific fields for export.

Security and tag history are not included in the export when you export a database. You can export a database's security settings from the Security dialog box. For more information about

exporting security settings, see Setting up security.

Before exporting a database, you can store the database's tag history in one of the database's fields using TagHistoryAndStoreIt_v10.00.

- ✍ When exporting to an existing database, fields are only copied if they exist in both databases.

To export a Concordance database:

1. Run a search query to locate the records you want to include in the export.

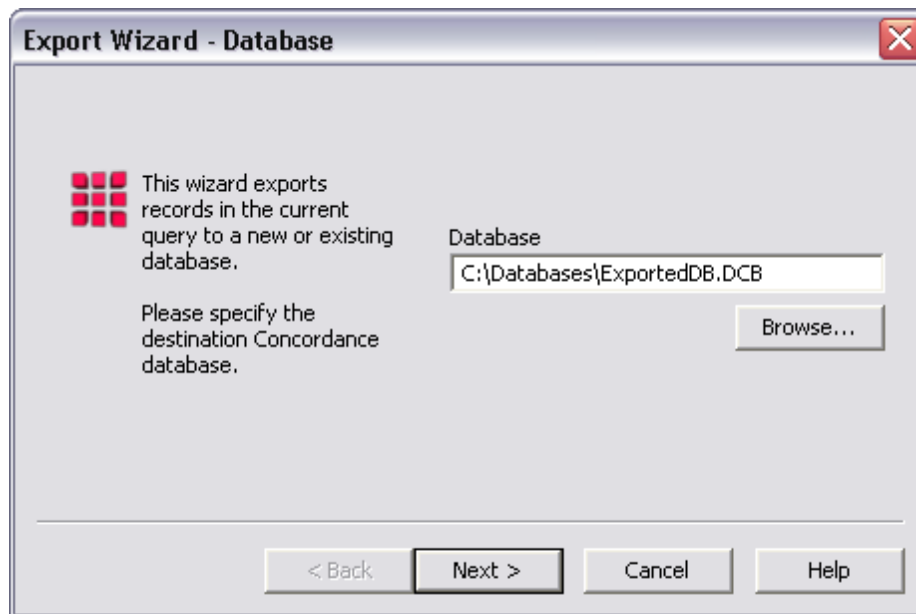
For more information about searching, see Available search tools.

When Concordance exports a database, Concordance can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

For more information about the Zero Query, see Reviewing search queries.

2. On the **Documents** menu, point to **Export**, and click **As a Concordance database**.

Clicking As a Concordance database opens the Export Wizard - Database dialog box.



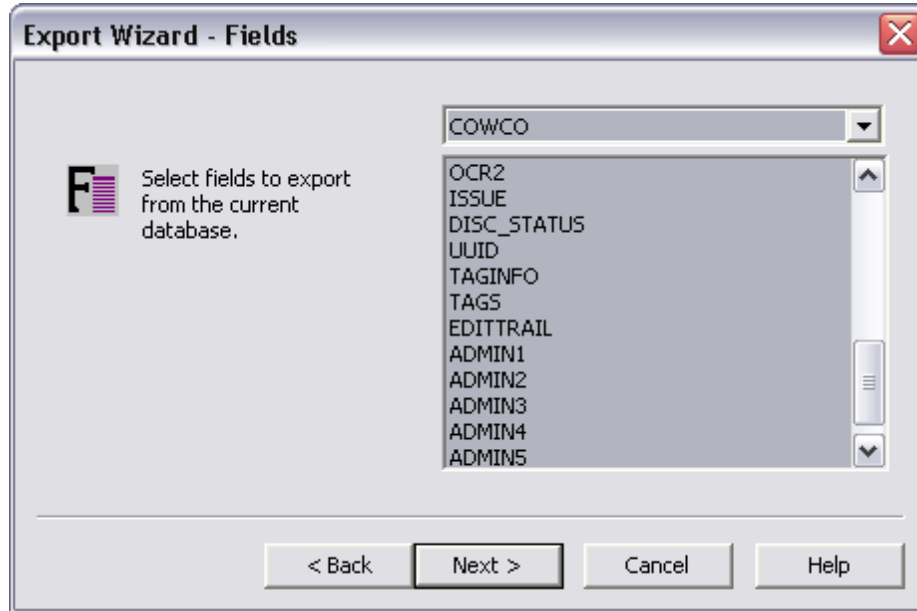
3. Click the **Browse** button to open the **Select database to merge** dialog box.
4. If you are exporting to an existing database, navigate to and open the .dcb or .fyi file for the database you are exporting to.

If you are exporting to a new database, navigate to where you want to store the database, type the database name in the File name field, and click Open.

Clicking Open adds the database file name and directory to the Database field in the

Export Wizard - Database dialog box.

5. Click **Next** to open the **Export Wizard - Fields** dialog box.



The database list defaults to the database currently opened and all the database's fields are selected in the field list.

- ✍ When exporting to an existing database, fields are only exported if the fields match the fields in the existing database.

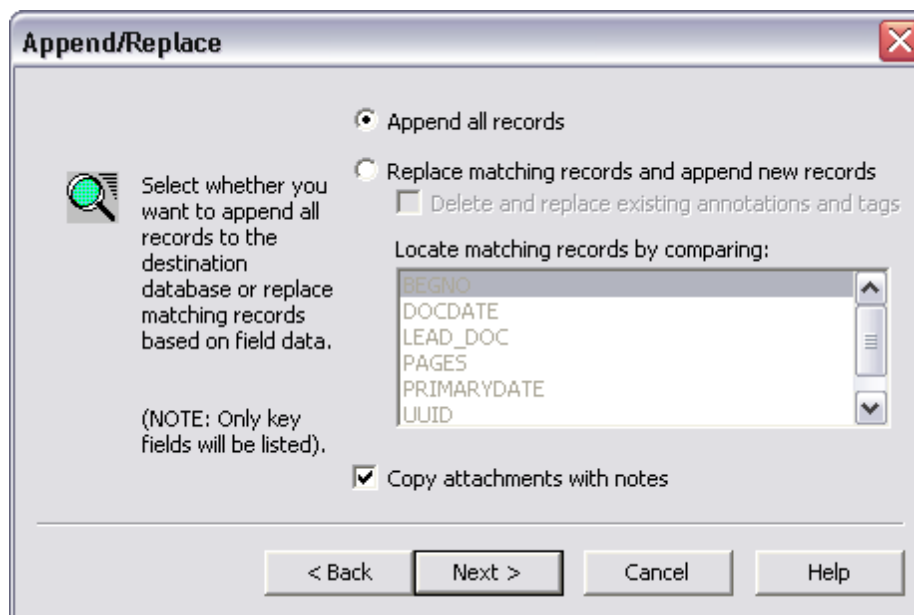
If the database is a concatenated database, the other databases in the concatenated set are also available for selection in the database list.

- ✍ When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

6. To include only some of the database fields in the export, in the fields list, click the fields you want to export.

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

7. Click **Next** to open the **Append/Replace** dialog box.



The Append/Replace dialog box allows you to control how documents are exported.

8. Choose one of the following options:

- **Append all records** - When you select this option, if you are exporting to a new database, the export adds all records in the query to the new database. If you are exporting to an existing database, the export appends all records in the query after the last record in the existing database.
- **Replace matching records and append new records** - When you select this option, the export searches for a matching record and replace it. If the export does not find a match, it appends the record.

The Delete and replace existing annotations and tags check box is only available when you select the Replace matching records and append new records option. The Delete and replace existing annotations and tags check box determines how annotations are copied when an existing record is updated. By default, the check box is not selected.

9. To have the export remove all existing tags and annotations for a record in the existing database when the export finds a matching record, select the **Delete and replace existing annotations and tags** check box.

When the check box is selected, any annotations from the matching exported record are added to the record.

To have the export ignore any existing tags and annotations for a record in the current database when the export finds a matching record, make sure that the Delete and replace existing annotations and tags check box is cleared.

The export uses the fields selected in the Locate matching records by comparing field to determine exact record matches between the two databases. The Locate matching records by comparing field is only available when you select the Replace matching records and append new records option. Only key fields are listed in the Locate matching records by comparing field.

Key fields are defined in the Modify dialog box. For more information about key fields, see Creating databases.

10. In the **Locate matching records by comparing** field, select the fields you want the export to use to determine record matches.

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

Full-text paragraph fields are considered a match if the first sixty characters or the first line, whichever is less, match, regardless of the remaining contents of the field.

11. To copy a record's attachments with notes during the export, select the **Copy attachments with notes** check box.

When the Copy attachments with notes check box is selected, the export automatically creates sequentially numbered attachment folders in the same directory as the Concordance database, and copies attachments into the subfolders. Folders are named in the format ATTACH-000000 and increment by one if the initial folder exceeds maximum capacity.

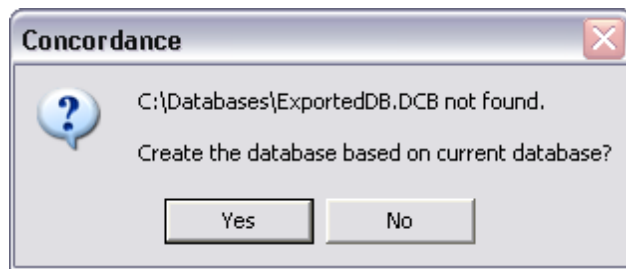
To exclude a record's attachments with notes from the export, clear the Copy attachments with notes check box.

12. Click **Next** to open the **Export Wizard - Export** dialog box.

The First and Last fields default to the first and last record in the current query.

13. To modify the range of the records to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.
14. Click the **Export** button.

If you are exporting to a new database clicking the Export button opens the following message:



15. Click **Yes** to start the export and have the export create the new database.

If you are exporting to an existing database, clicking the Export button starts the export.

You can click the Cancel button at any time to cancel the process.

When the export finishes, the Export Wizard - Export dialog box automatically closes.

Exporting to Concordance Native Viewer

Concordance load file formatting

A load file (.opt, .log, .txt) format is a delimited ASCII file containing all information necessary to insert links into the imagebase. The load file consists of seven delimited entries. Reference the following table and examples when formatting images.

Image Load Files	
Format	Description
ALIAS	Should match your media (image) key from the Concordance database. Concordance stores this key in order to reference the image.
VOLUME	Name of the volume where the documents and images reside, typically the volume name of a CD or DVD server.
PATH	Full path and file name (and extension) of the image.
DOC_BREAK	Enter a Y to denote whether this image marks the beginning of a document.
PAGES	Number of pages associated with the image
Character	Description

Image Load Files	
Format	Description
Y	First page of a document
Comma (,)	Indicates a page break or pages

Example: Concordance Native Viewer format for single-page TIFF files

```
00010002,NROTEK001,NROTEK001\001\00010002.tif,Y,,,1
00010003,NROTEK001,NROTEK001\001\00010003.tif,Y,,,1
00010004,NROTEK001,NROTEK001\001\00010004.tif,Y,,,3
00010005,NROTEK001,NROTEK001\001\00010005.tif,,,,
00010006,NROTEK001,NROTEK001\001\00010006.tif,,,,
```

Example: Concordance Native Viewer format for Multiple-Page PDF files

```
00010036,NROTEK001,NROTEK001\001\00010036.pdf,Y,,,29
00010065,NROTEK001,NROTEK001\001\00010065.pdf,Y,,,2
00010067,NROTEK001,NROTEK001\001\00010067.pdf,Y,,,3
00010070,NROTEK001,NROTEK001\001\00010070.pdf,Y,,,1
00010071,NROTEK001,NROTEK001\001\00010071.pdf,Y,,,1
```

 A load file does not necessarily need the volume name, but still needs the parameter for the volume name (the commas). Example format: Imagekey/Alias,Volume Name,Pathname,Doc Break,Folder Break, Box Break, Page Count - without the VOL name would look like this: 0000001,,D:\VOLO001\001\0000001.tif,Y,,,1

 A document or image file path cannot contain a comma (,) when exporting to Concordance Native Viewer from Concordance. The comma is used as a delimiter in the exported OPT file.

Unique Identifier (Media Key)

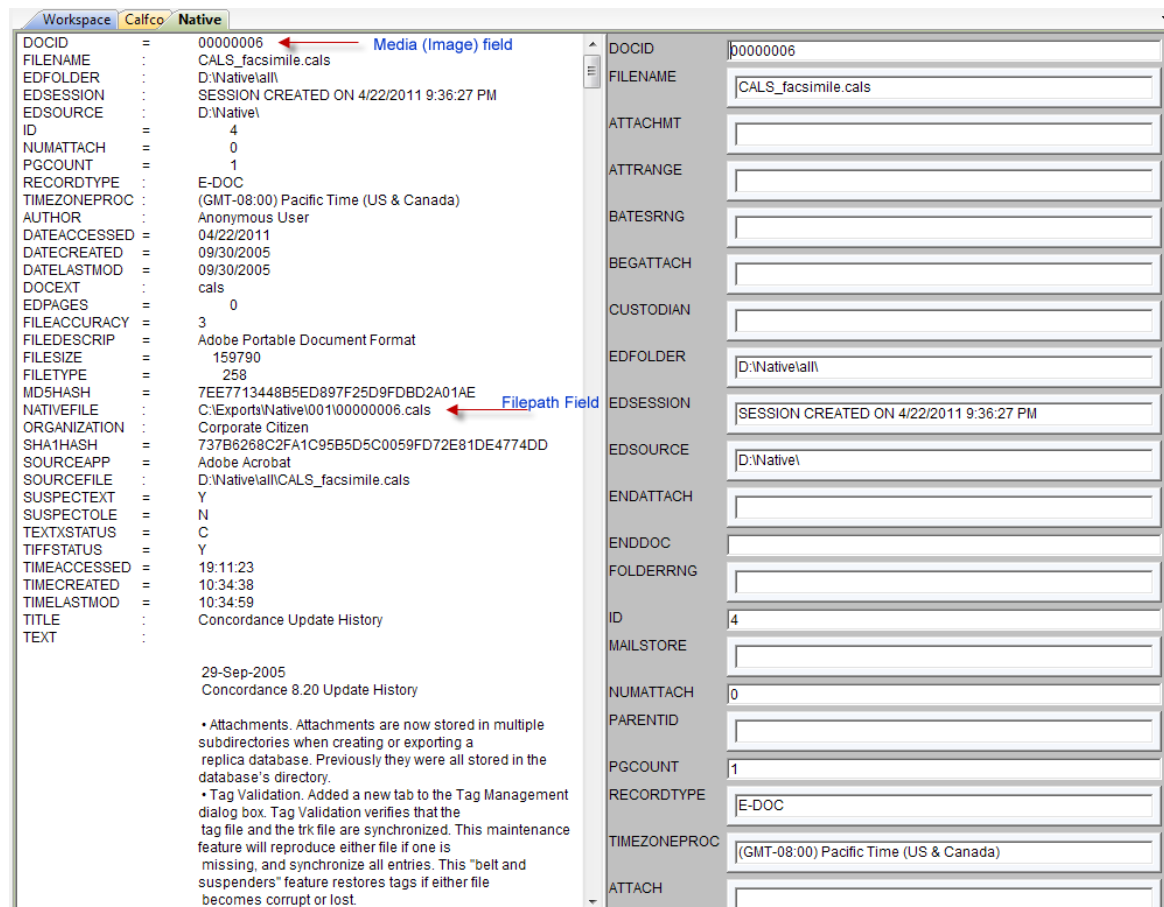
Your load file format's alias (media key) should match your image key from the Concordance database. Concordance stores this key in order to reference the image.

 The alias in your load file matches the database field that has the Image check box selected on the Modify dialog box for the database in Concordance. For more information about the Image check box, see About fields.

 Concordance Native Viewer will not load documents and images if the media (image) key contains over 1000 characters or a comma (,).

To export native files for use in Concordance Native Viewer:

1. In Concordance, create the database you want to use with Concordance Native Viewer. For information on creating a database, see Creating native file databases.



Field	Value
DOCID	00000006
FILENAME	CALS_facsimile.cals
EDFOLDER	D:\Native\all\
EDSESSION	SESSION CREATED ON 4/22/2011 9:36:27 PM
EDSOURCE	D:\Native\
ID	4
NUMATTACH	0
PGCOUNT	1
RECORDTYPE	E-DOC
TIMEZONEPROC	(GMT-08:00) Pacific Time (US & Canada)
AUTHOR	Anonymous User
DATEACCESSED	04/22/2011
DATECREATED	09/30/2005
DATELASTMOD	09/30/2005
DOEXT	cals
EDPAGES	0
FILEACCURACY	3
FILEDESCRIP	Adobe Portable Document Format
FILESIZE	159790
FILETYPE	258
MD5HASH	7EE7713448B5ED897F25D9FDBD2A01AE
NATIVEFILE	C:\Exports\Native\001\000000006.cals
ORGANIZATION	Corporate Citizen
SHA1HASH	737B6268C2FA1C95B5D5C0059FD72E81DE4774DD
SOURCEAPP	Adobe Acrobat
SOURCEFILE	D:\Native\all\CALS_facsimile.cals
SUSPECTEXT	Y
SUSPECTOLE	N
TEXTXSTATUS	C
TIFFSTATUS	Y
TIMEACCESSED	19:11:23
TIMECREATED	10:34:38
TIMELASTMOD	10:34:59
TITLE	Concordance Update History
TEXT	29-Sep-2005 Concordance 8.20 Update History • Attachments. Attachments are now stored in multiple subdirectories when creating or exporting a replica database. Previously they were all stored in the database's directory. • Tag Validation. Added a new tab to the Tag Management dialog box. Tag Validation verifies that the tag file and the trk file are synchronized. This maintenance feature will reproduce either file if one is missing, and synchronize all entries. This "belt and suspenders" feature restores tags if either file becomes corrupt or lost.

2. Import the data into the database.
3. Verify that each record has a unique identifier in the field that you marked as the media (image) key field and the filepath field displays the path to the native document.
4. From the **Documents** menu, click **Export**, and then click **Concordance Native Viewer**.
5. In the **Export to Concordance Native Viewer**, select the database field where the file path is stored. Note the output file path. This is where the .opt file will be exported for importing in Concordance Native Viewer.

- Each time you perform an export, a unique OPT filename is generated with the date and time the file is created, DBNAME_YYYYMMDDhhmmssfff (i.e. CALFCO_20110517105932021.opt).
- 6. When finished, click the Camera button to view the documents and images in Concordance Native Viewer.
- 7. In the **Exported Load File** section of the **Imagebase Conversion Source Selection** dialog box, select the OPT file you exported, and then click **Convert**.
- 8. Concordance Native Viewer opens and displays the documents and images.

Exporting delimited text files

In Concordance you can export data directly to another Concordance database or save the records as delimited text files.

The benefit of exporting to delimited ASCII files is that this format is universal and works in other database management systems. Some forethought in planning the export of these files includes understanding that there are certain features in Concordance that have no parallel in other database managers such as Microsoft SQL Server and Microsoft Access. These features include record tags, issue coding, annotations, attachments, and hypertext links. Exporting in Concordance delimited text files does not preserve record mark-ups.

When you export database records to a delimited text file, the export includes every record in the current query, in the sort order they are listed. If you want to export the entire database, run the Zero Query. For more information about the Zero Query, see *Reviewing search queries*.

when you export records to a delimited text file you can export the records using the Export Wizard to guide you through the export process or you can manually export the records using the Export Delimited ASCII dialog box.

- When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

To export to a delimited text file using the Export Wizard:

1. Run a search query to locate the records you want to include in the export.

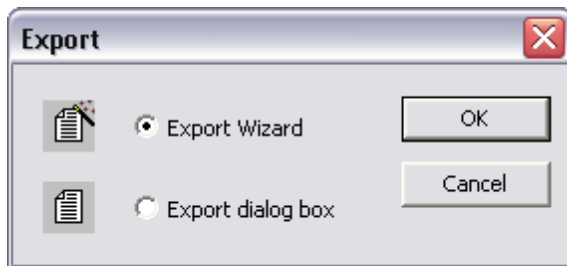
For more information about searching, see *Available search tools*.

When exporting from Concordance, Concordance can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

For more information about the Zero Query, see *Reviewing search queries*.

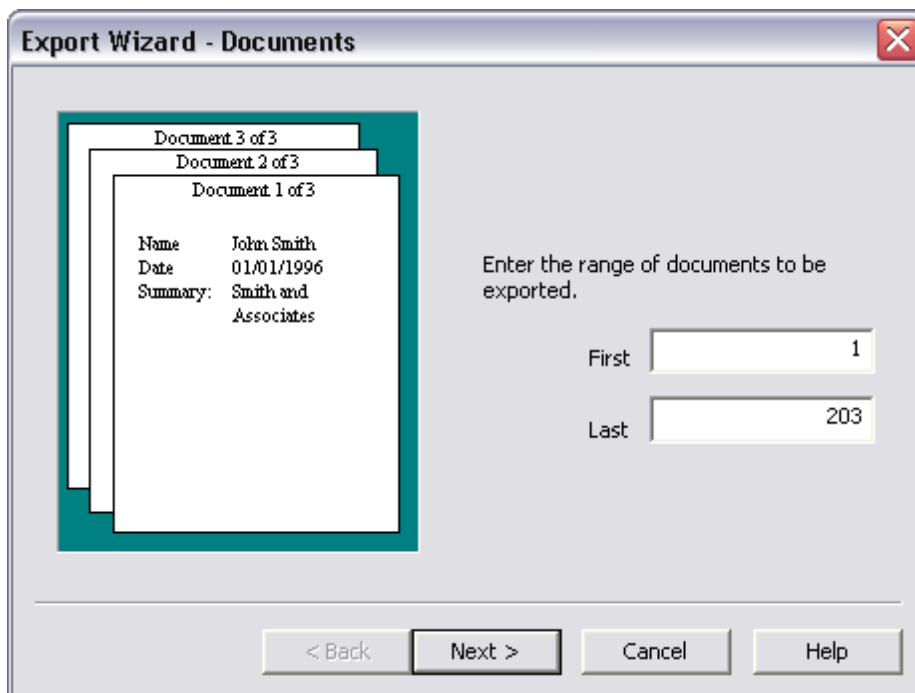
2. On the **File** menu, point to **Export**, and click **To a delimited text file**.

Clicking the option To a delimited text file opens the Export dialog box.



3. Click the **Export Wizard** option and click **OK**.

Clicking OK opens the Export Wizard - Documents dialog box.



The First and Last fields default to the first and last record in the current query.

4. To modify the range of the records in the query to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.
5. Click the **Next** button to open the **Export Wizard - Format** dialog box.



Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Format field defaults to Concordance default.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

Default Delimiters for Concordance

The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254

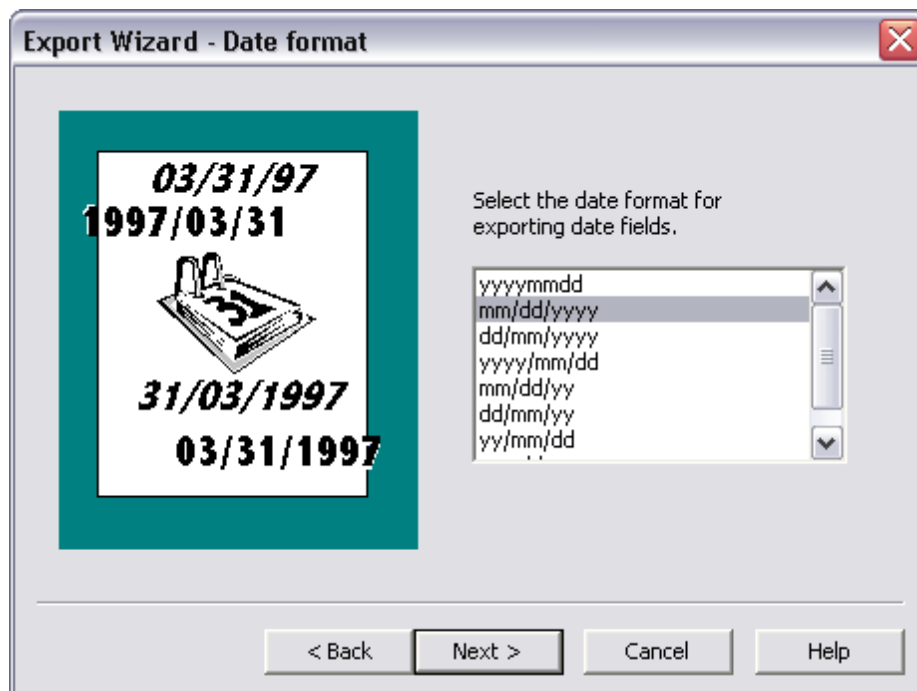
Concordance Default Delimiters

Delimiter Character	Function	Numeric Value
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

- ✎ The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

- Click **Next** to open the **Export Wizard - Date format** dialog box.



7. Click the date format you want to use in the delimited text file.

The dates exported from the database to the delimited text file will be exported using the date format you select in the Export Wizard - Date format dialog box.

8. Click **Next** to open the **Export Wizard - Fields** dialog box.



By default, all of the database fields are added to the **Selected fields** list for the export.

9. To only select some of the fields for the export, click the double arrow (<<) button to move all the fields to the **Available fields** list.
10. In the **Available fields** list, select the fields you want to include in the export, and click the right arrow (>) button to add the fields to the **Selected fields** list.
11. To change the order of the fields in the export, in the **Selected fields** list, click the field you want to move and click the **Up** or **Down** button to move the field.

The field order in the Selected fields list will be the field order in the delimited text file.

12. To display hidden system fields in the **Export Wizard - Fields** dialog box, select the **Show system fields** check box.

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

13. To include field names in the export, select the **Export field names** check box.

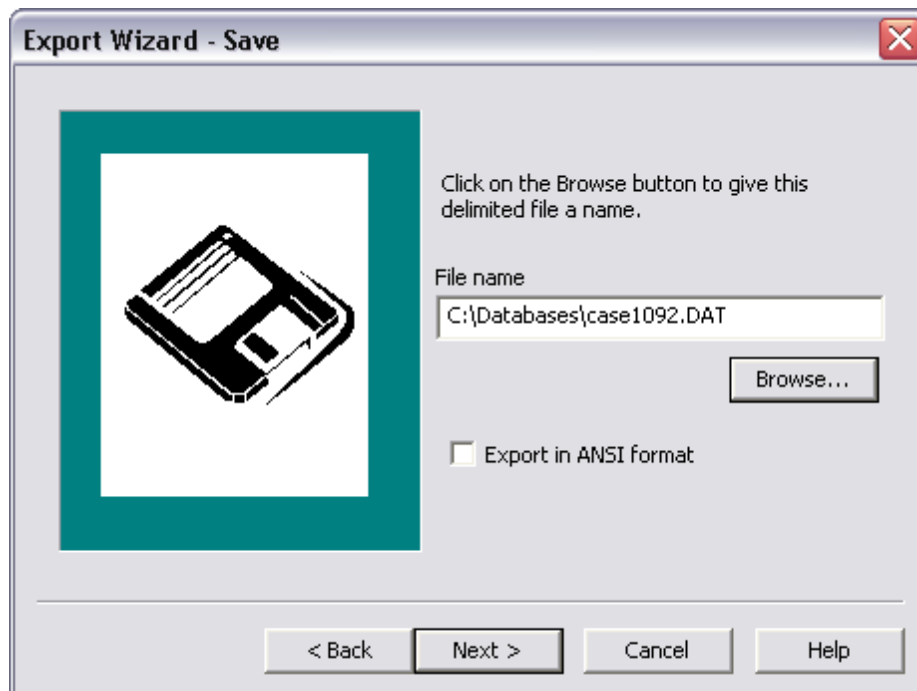
If the Export field names check box is selected, field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.

14. To export Concordance data with rich text, select the **Export rich text** check box.

Full text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance database. Do not export rich text if the data is destined for another program.

If the Export rich text check box is not selected, all text formatting is stripped from the exported data during the export.

15. Click **Next** to open the **Export Wizard - Save** dialog box.



16. Click the **Browse** button to open the **Save As** dialog box.

17. Navigate to where you want to save the delimited text file, in the **File name** field, type the file name, in the **Save as type** field, select the type of text file you want to create, and click **Save**.

Clicking Save adds the delimited text file name and directory to the Database field in the Export Wizard - Database dialog box.

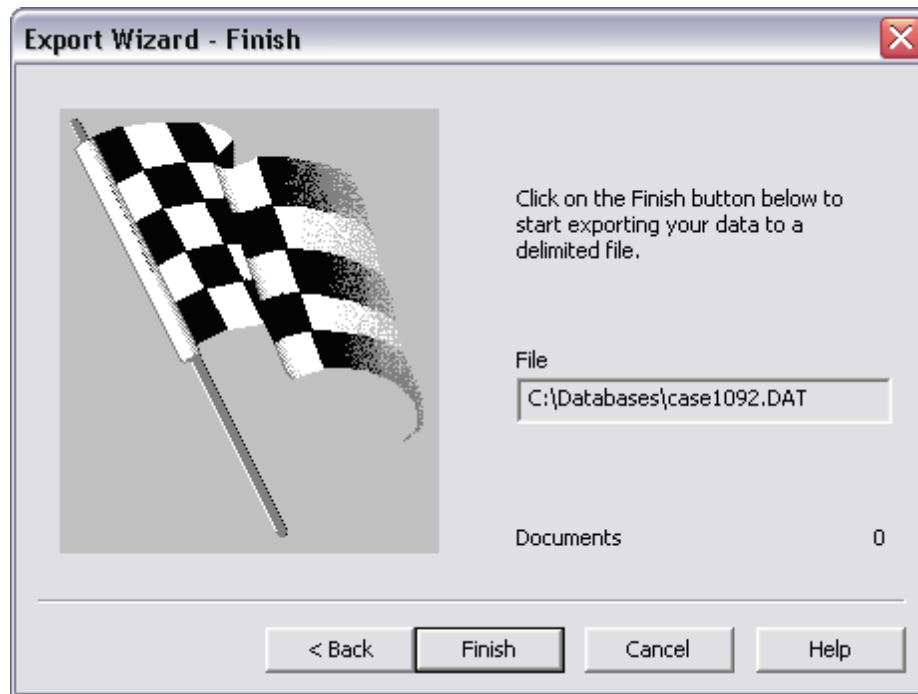
18. To export the data in ANSI (American National Standards Institute) format, select the **Export in ANSI format** check box.

You will want to select the Export in ANSI format check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance version 2007 or earlier.

For more information about the Unicode Standard and Concordance, see About the Unicode Standard.

⚠ When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

19. Click **Next** to open the **Export Wizard - Finish** dialog box.



20. Click the **Finish** button to export to the delimited ASCII file.

The Export Wizard - Finish dialog box automatically closes when the export finishes.

☐ **To export to a delimited text file using the Export Delimited ASCII dialog box:**

1. Run a search query to locate the records you want to include in the export.

For more information about searching, see Available search tools.

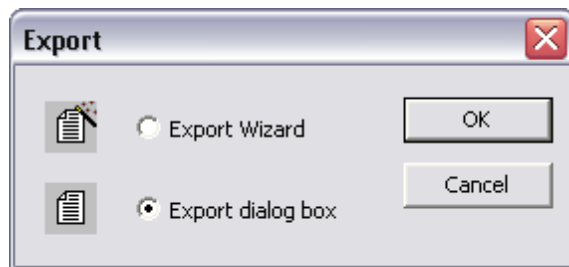
When Concordance exports a database, Concordance can export just the records in the current query or can export all the records in the database. If you want to export all the records, you can run the Zero Query.

For more information about the Zero Query, see Reviewing search queries.

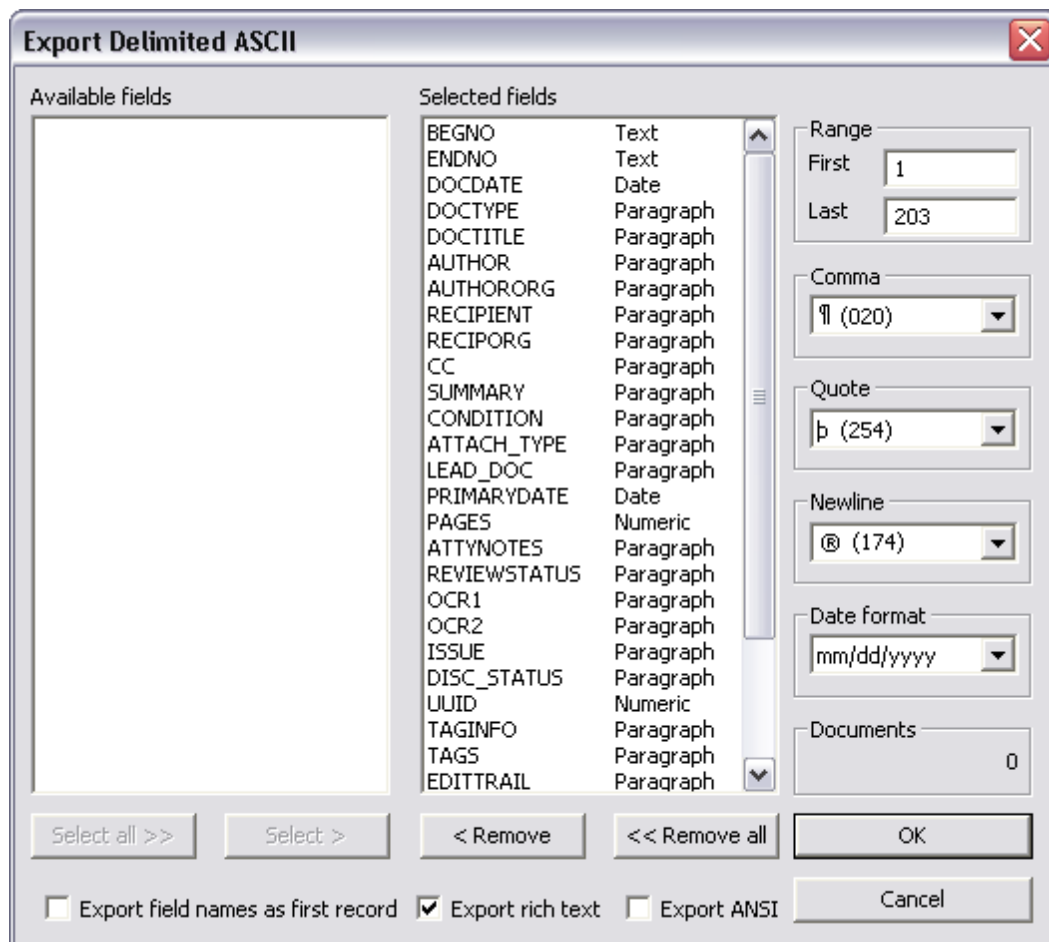
2. On the **File** menu, point to **Export**, and click **To a delimited text file**.

Clicking To a delimited text file opens the Export dialog box.

3. Click the **Export** dialog box option and click **OK**.



Clicking OK opens the Export Delimited ASCII dialog box.



By default, all of the database fields are added to the Selected fields list for the export.

4. To only select some of the fields for the export, click the **Remove all** button to move all the fields to the **Available fields** list.
5. In the **Available fields** list, select the fields you want to include in the export, and click the **Select** button to add the fields to the **Selected fields** list.

To change the order of the fields in the export, click the Remove all button to add all the fields to the Available fields list and then add each field to the Selected fields list in the order you want the fields to be listed. The field order in the Selected fields list will be the

field order in the delimited text file.

6. To include field names in the export, select the **Export field names as first record** check box.

If the Export field names as first record check box is selected, field names are exported as the first record, with each field name taking the place of its field's data for that record. Exporting field names can help manage data if the data is imported into another program.

7. To export Concordance data with rich text, select the **Export rich text** check box.

Full text paragraph fields in Concordance can contain rich text. Rich text contains font changes, bullet lists, and other word processor commands that other database programs cannot handle. You can export with rich text if the data is destined for another Concordance database. Do not export rich text if the data is destined for another program.

If the Export rich text check box is not selected, all text formatting is stripped from the exported data during the export.

8. To export the data in ANSI (American National Standards Institute) format, select the **Export ANSI** check box.

You will want to select the Export ANSI check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance version 2007 or earlier.

For more information about the Unicode Standard and Concordance, see About the Unicode Standard.

 When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

The First and Last fields in the Range section default to the first and last record in the current query.

9. To modify the range of the records in the query to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.

Concordance is a full-text database manager. Its documents are likely to contain text delimiters — commas, quotes, and carriage returns — that may confuse other programs, or Concordance itself, when reading the delimited text file.

To avoid this problem, Concordance allows you to specify the characters recognized as the comma, quote, and newline delimiters in delimited text files.

The Comma, Quote, and Newline fields default to the default delimiters for Concordance.

If you are exporting and importing documents within the Concordance system, then you won't need to change these default values. Change them only if you are using these characters in the text of your documents.

[Default Delimiters for Concordance](#)

The default delimiter characters used by Concordance are listed below. To the right of each delimiter character is the delimiter's numeric value.

Concordance Default Delimiters		
Delimiter Character	Function	Numeric Value
Comma	The field delimiter separates one field from the other.	20
Quote	The text qualifier encloses text to differentiate it from field delimiters which may appear in the data.	254
Newline	Substitute carriage return. Some programs use this character to designate multi-level fields or fields-within-fields. Concordance replaces all carriage returns or carriage return linefeed combinations with the newline code within the data of a field. The record itself is still terminated with a real carriage return and a line feed.	174

 The delimiters available from the Comma, Quote, and Newline fields may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment. The delimiters listed in the About delimiter characters topic use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed in the delimiter character list can be selected as the delimiter, even if the symbols they represent do not appear in the Comma, Quote, and Newline fields.

To see the list of available delimiter characters, see About delimiter characters.

10. In the **Date format** field, click the date format you want to use in the delimited text file.

The dates exported from the database to the delimited text file will be exported using the date format you select in the Date format field.

11. Click the **OK** to open the **Unload delimited file** dialog box.

12. Navigate to where you want to save the delimited text file, in the **File name** field, type the file name, in the **File of type** field, select the type of text file you want to create, and click **Open**.

Clicking Open initiates the export to the delimited ASCII file.

The Export Delimited ASCII dialog box automatically closes when the export finishes.

Exporting database structures

You can export a copy of the database structure to create a duplicate database or to create a new database template based off a current database. The structure is stored in a .dcb file and contains the original field names and their types. Data exported from a database can be loaded into another database that has been exported.

Before exporting a database structure, you can save the structure to a .txt file that you can print for your reference. The text file contains a list of all the database's fields and field types.

Keep the following in mind when exporting concatenated databases:

- Concordance exports data from all databases within a concatenated set only when the concatenated databases have identical database structures.
- When exporting from a concatenated set with different database structures, the contents from the secondary database gets exported only for the fields that match the primary database. The remaining field contents will not be exported.

To export a database structure to create a template, see [Using a database template](#).

To populate a database with data from another database, see [About importing files](#).

To save a database structure to a .TXT file:

1. In Concordance, open the database with the database structure you want to save.
2. On the **File** menu, click **Modify**.
Clicking Modify opens the Modify dialog box.
3. Click the **Save to File** button to open the **Save Field Definitions** dialog box.
4. Navigate to where you want to save the file, in the **File name** field, type the file name, and click **Save**.

To export a database structure:

1. In Concordance, open the database with the database structure you want to export.
2. On the **Documents** menu, point to **Export**, and click **Structure**.
Clicking Structure opens the Copy Structure dialog box.
3. Navigate to where you want to save the database structure .dcb file, type the name of the database file in the **File name** field, and click **Save** to export the database structure.

Exporting transcripts

Administrators are not typically involved in the general printing of transcripts, but may be asked to export transcript files from Concordance into another application such as West LiveNote.

Transcripts can be exported to the West LiveNote standard Portable Case Format (.pcf) file structure or to a delimited text file. This allows you to export several transcripts to a single file, keeping annotations, quick marks, notes, and issue codes intact. Hyperlinks are also transferred, but any external files they link to are not transferred and must be copied manually.

Transcripts can also be exported to delimited text files. For more information about exporting to delimited text files, see [Exporting delimited text files](#).

- ✍ When exporting concatenated databases, only the data in fields that are identically named and formatted in the concatenated set will be exported.

To export transcripts to a .pcf file:

1. In Concordance, open the database containing the transcripts you want to export.
2. Run a search query to locate the transcripts you want to include in the export.

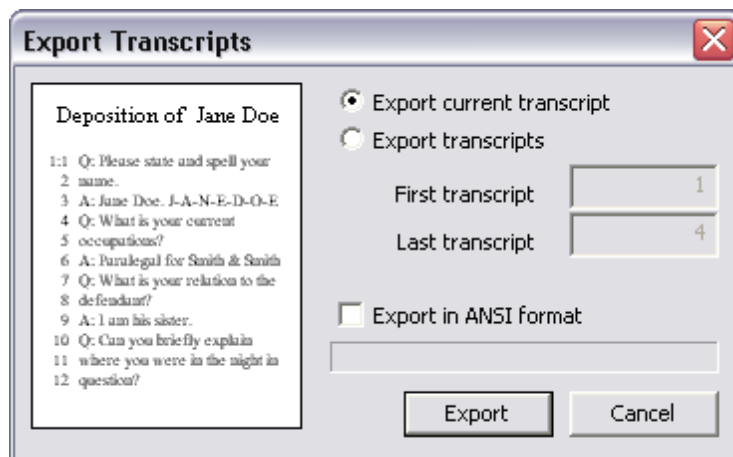
For more information about searching, see [Available search tools](#).

When exporting from Concordance, Concordance can export just the records in the current query or can export all the records in the database. If you want to export all the records, run the Zero Query.

For more information about the Zero Query, see [Reviewing search queries](#).

3. On the **Documents** menu, point to **Export**, and click **Database transcripts**.

Clicking Database transcripts opens the Export Transcripts dialog box.



4. To export only the current transcript, select the **Export current transcript** option.
5. To export multiple transcripts, select the **Export transcripts** option.

When you select the Export transcripts option, the First transcript and Last transcript fields become available. The First transcript and Last transcript fields default to the first and last record in the current query.

To modify the range of the transcripts in the query to be exported, in the First transcript field, type the record number for the first transcript in the range you want to export, and in the Last transcript field, type the record number for the last transcript in the range you want to export.

6. To export the data in ANSI (American National Standards Institute) format, select the **Export in ANSI format** check box.

You will want to select the Export in ANSI format check box if you will be importing the delimited text file into an application that does not support the Unicode Standard, such as importing into Concordance version 2007 or earlier.

For more information about the Unicode Standard and Concordance, see About the Unicode Standard.

 When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. For an example, see the "Export Issues and Tips" section in the About the Unicode Standard topic.

7. Click the **Export** button to open the **Save As** dialog box.
8. Navigate to where you want to save the transcript .pcf file, type the name of the transcript file in the **File name** field, and click **Save** to export the transcripts.

Once the transcript .pcf file is created, the file can be imported in to West LiveNote. For more information about importing .pcf files into LiveNote, see the West LiveNote documentation.

Preparing Productions

About productions

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

Concordance provides two production options:

- Standard production - produces a set of TIF or PDF files, .opt and a .dat load file.
- Native production - copies original native files out to a production destination directory and the files can be renamed with the production numbers. No redactions or other production

type operations happen, simply a copy and rename. for more information about Native File production, see Running a native file production.

⚠ It is recommended that a production run, executed from Concordance, be performed on a machine that is not currently running any other applications. This is due to the integration of a 3rd-party tool with Concordance that currently switches the input focus while the production process is running.

✍ Before running a production, make sure that all users are logged out of the database.

Managing Rolling Productions

Due to the ever-increasing size of electronic productions, litigation support staff are often faced with the task of handling and tracking large volumes of data that are incoming and outgoing during the life cycle of an e-discovery project. As a best practice, we recommend establishing an organized tracking method to ensure that all data is properly handled and nothing is missed.

Examples of Data Types Handled during E-discovery:

Here are some examples of data that can be handled during a large e-discovery:

- Data coming from clients that needs to be processed. This could include paper documents, electronic files, e-mail files, images, metadata load files, transcripts, graphics, and audio/video files.
- Data being produced from opposing parties to be loaded into a review tool, such as Concordance, for review by attorneys, paralegals, experts or investigators.
- Data going out to vendors for processing, scanning, coding, or printing.
- Data to be processed in-house using an e-discovery processing software, such as LAW PreDiscovery.
- Data such as exhibits, graphics, and presentations being prepared for trial to be loaded into trial presentation software.
- Transcripts and audio/video files from court reporters to be loaded into a transcript database for review and analysis.
- Data being copied or produced to other parties for review such as co-counsel and experts.
- Data being produced to opposing parties.
- Data that is to be archived from the network to disk or hard drive storage.
- Data that requires special handling, such as compliance with destruction or preservation orders.

When handling forensically collected data, be sure to follow appropriate legal procedures for preservation, handling, and chain of custody to avoid spoliation issues.

Tracking Data

There are many ways that data can be tracked using database software tools specifically designed to help facilitate data tracking for e-discovery, such as Concordance, Microsoft Access, or Microsoft Excel.

CDs, DVDs, and external hard drives are typically labeled using some sort of uniform numbering system so that it is possible to track all incoming and outgoing volumes. Production volumes are also usually numbered in a series for record-keeping purposes. It is also important to keep track of production Bates number series to avoid accidental production of documents with overlapping Bates numbers.

Archiving Data

Establishing a uniform system for archiving data that must be preserved, but is no longer being actively used is also important. Maintaining a uniform archival tracking system makes it easier to locate data in the event that it must be recovered from storage and uploaded to the network at a later date.

We also recommend that you become familiar with your organization's backup, retrieval, and data retention policies so that you are prepared in the event that you need to recover data on short notice.

Related Topics

About backing up databases
About archiving databases

Production Elements

Numbering Documents

As part of the production process, a new set of files are generated for documents that need to be produced. A Bates number series is then applied to all pages of all documents included in the production, with the option of *burning* or *fusing* the numbers to the image during the process. This number series usually differs from that of your internal collection. You can then track what has actually been produced and your Bates number series for the production is sequential with no gaps in the numbering.

Fusing Annotations

Redactions or other redlines can be *burned* or *fused* to the images during production so that they cannot be altered. Confidentiality headers or footers can also be fused to the images during production. Production numbers are usually cross-referenced to those in the original review collection.

If the Concordance 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 PRODBEG1/PRODEND1, PRODBEG2, PRODEND2, etc.

Production Output

The output generated by a production run in Concordance is a set of TIF images or PDF files and a load file. The output generated by an electronic production in Concordance Image is a set of images and an image load file. Both the production set and the load file are typically burned onto CDs or DVDs (or for very large collections, an external hard drive). Output volumes, such as CDs or DVDs, are labeled to track the production series.

Native Files

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

Non-Production Documents

Non-production documents and images from Concordance may also need to be shared with outside counsel, experts, clients, or other parties. Concordance Image's production tool is used to generate a non-production set of images and load files for this distribution.

For shared document reviews, you can use Concordance FYI, FYI Reviewer and Hosted FYI from LexisNexis.

Generating Load Files and Images

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

Production load files enable recipients to import images into their own viewer software. Images and load files are generated for either single or multi-page TIFF format. Load files for data are generated during the export process.

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

Concordance export processes work well with most of the review tools on the market, or Concordance data can be converted to something that will work. Native review productions are usually handled a bit differently than non-native productions, since native productions do not have image files for the documents.

Productions and Concatenated databases

- When running productions on a set of concatenated databases for Concordance Native Viewer files, all the databases in concatenated set must have identical database structures and have matching Media (Image) key field names across the concatenated set.
- Concordance Native Viewer productions will only be performed on the primary database when differing database structures (any one of the field names is different between the primary and secondary databases or any additional fields exist in any one of the databases) are included a concatenated set.
- Productions for differing database structures should be run separately for each database.
- Productions should be run on a stand-alone machine without any other applications running.

Running a standard production

Creating a production

Concordance provides the tools you need to permanently fuse headers, footers, and annotations onto the new .tif or .pdf files. This ensures that your files are branded properly and that opposing counsel and any internal review staff do not receive original copies or view privileged content.

-  If you are using Concordance and Concordance Native Viewer, the Production command is available in Concordance (Tools > Production).

Production Process Overview:

1. Generate new production numbers and cross-reference them back to the Concordance database.
2. Create new files.
3. Burn in redactions and other selected annotations.
4. Create CD/DVD productions.
5. Create subsets of imagebases.
6. Create load files.

Each time you produce a batch of records, a new set of production files are created. This ensures that original records are never changed, and that there is always a backup copy of document changes.

-  When creating productions, close any other database tabs so Concordance does not synchronize with a different database incorrectly. We recommend having no more than

three tabs or databases open during this process.

When exporting a concatenated set for productions, you can only export fields from one selected database structure.

Selecting Image File Types

Reference the Supported Image File Types table when making adjustments as needed to match the images you are producing for image type, compression, and number of colors.

Supported Image Types	Compression	Colors
TIFF	None	
	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
	24-bit	16.7 million colors
<i>(Concordance Image Only)</i>	Group 3	
	1-bit	Black & White
<i>(Concordance Image Only)</i>	Group 3 2D	
	1-bit	Black & White
<i>(Concordance Image Only)</i>	Group 3 TIFF	
	1-bit	Black & White
<i>(Concordance Image Only)</i>	Group 4	
	1-bit	Black & White
	Pack Bits	
	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
	24-bit	16.7 million colors
PCX	PCX	
<i>(Concordance Image Only)</i>	1-bit	Black & White
	4-bit	16 colors
	8-bit	256 colors
CALS	Group 4	
<i>(Concordance Image Only)</i>	1-bit	Black & White
JPEG	JPEG	
<i>(Concordance Image Only)</i>		

Supported Image Types	Compression	Colors
	24-bit	16.7 million colors

Production Checklist

Refer to the Pre-Production Checklist to ensure all steps are completed before running a production.



Pre-Production Checklist

File Numbering

- ☐ Have you determined a file numbering and naming convention for your images?
- ☐ Have you created fields in your database to store your new production numbers?

Delivery Media

- ☐ Do you have the proper production request file formats and media delivery types from opposing counsel or other third parties?

Tagging

- ☐ Have you reviewed documents categorized for production for possible tagging inconsistencies by reviewers?
- ☐ Did you run the Tag To Field command, Tools > Manage Tags/Issues, on production documents to capture tag activity at the time of production? Tag names can be placed into a field called PRODTAGS1.

Back-ups and File Storage

- ☐ Did you save a backup copy of your media files before production?
- ☐ Did you back up your imagebase files?
- ☐ Did you create a subdirectory folder for your new files?

Final Review

- ☐ Have you reviewed the [database name]-Redlines.dcb database for all markings and make global edits on redaction text and highlight colors, as needed? (*Concordance Image only*)

Production Training

Anyone tasked with preparing productions should receive Concordance Administration training before attempting to produce documents from a live database. The litigation industry guidelines regarding how discovery documents are handled, processed, and shared between parties is a sensitive matter.

If you or anyone on your IT or Litigation Support Team are interested in learning more about productions, please contact our Client Training Administrator at 1-800-227-9597 ext. 1252111, visit LexisNexis University for additional information on Concordance certification courses, or email us at litservtraining@lexisnexis.com to register for the Concordance Administration Fundamentals and the Certified Concordance Software Administrator courses.

Executing a production run with Concordance Native Viewer in Concordance

1. Locate the documents to produce
2. Marking up documents for production
3. Capture the tag activity
4. Defining production parameters
5. Verify the produced images
6. Create a production database

Executing a production run in Concordance Image

If you are using Concordance Image, the redlines database allows you to access the image annotations to remove, add, or alter an applied graphic later. Printing documents also produces a slightly smaller output: single images are automatically reduced by two percent, and multiple images by four percent.

1. Locate the documents to produce
2. Annotating documents for production
3. Capturing tag activity in Concordance
4. Produce the images
5. Verify the produced images
6. Create a production database

Locating documents to produce

Whether you are using Concordance Native Viewer or Concordance Image for a production, you first need to identify and locate the documents you want to produce.

To locate documents for a production:

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

For more information about searching, see Available search tools.

3. Create a tag specific to this production, such as PROD1, and apply the tag to the applicable documents.

For more information about creating and applying tags, see Creating and applying tags.

Annotating documents for production

Make sure that the proper annotations have been applied to the records you want to include in a production.

Annotations to consider adding to records for productions:

- Redactions to indicate and/or cover confidential or privileged information.
- White redaction to hide internal control numbers, vendor branding, and other information you do not need to include in the production.

Related Topics

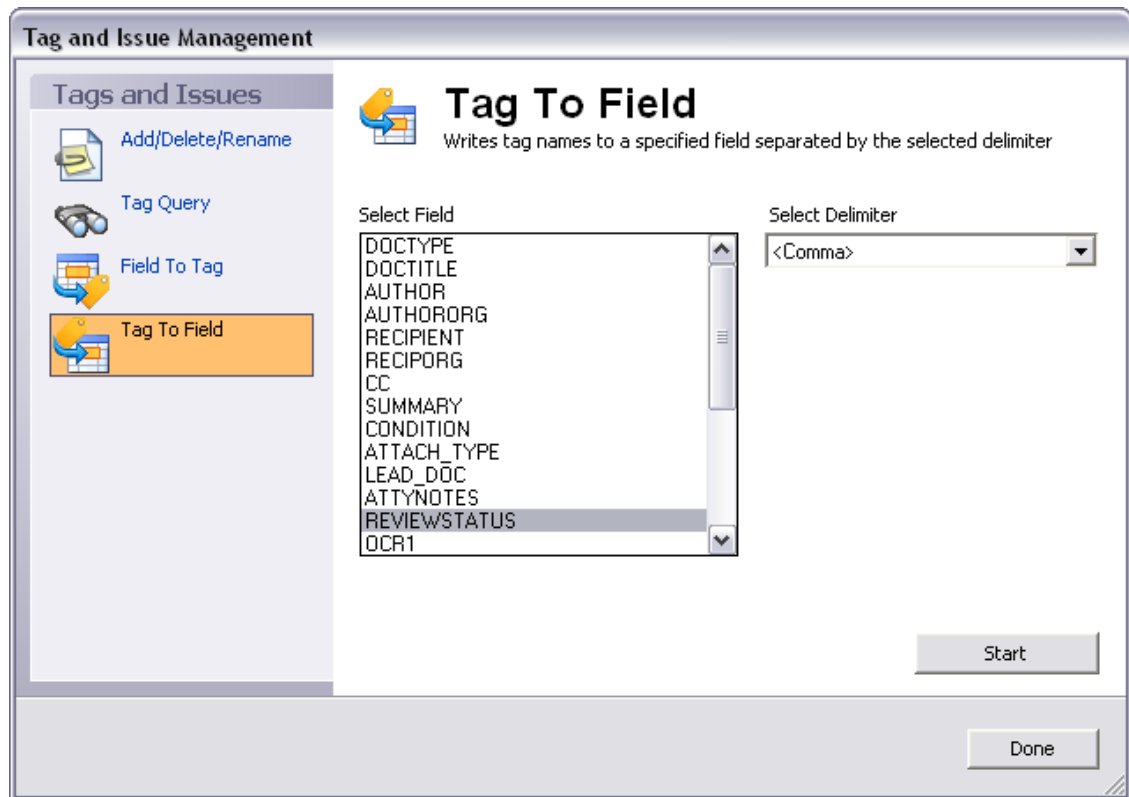
Adding markups in Concordance Native Viewer
Applying redlines to images in Concordance Image

Capturing tag activity in Concordance

Before running a production, you need to run the Tag To Field command, Tools > Manage Tags/Issues. The Tag To Field command copies the contents in tags to a specific field in a database. Executing this command before creating the production captures tags that were applied to each record just before the production was created. See also, TagToField_v[version#].cpl.

Running the Tag To Field command

1. In Concordance, create a database field, such as PRODTAGS1, to store the tag information.
2. For more information about database fields, see [About fields and Creating databases](#).
3. On the **Tools** menu, click **Manage Tags/Issues**.
4. In the **Tag and Issue Management** dialog box, click the **Tag To Field** button.



5. From the **Select Field** list, select the field you want to copy the tag names.
6. From the **Select Delimiter** list, select the delimiter to separate the tag names in the field.
7. Click the **Start** button.
8. When prompted, do one of the following:
 - Click **Yes** to confirm that you want to write the tag names in the selected field.
 - Click **No** to append the tag names to the existing field contents.
 - Click **Cancel** to abandon the changes.
9. When finished, click **Done**, and verify that the selected field displays the tag names separated by the selected delimiter.

Producing TIFF and PDF output with CNV

When you run a production, you may choose to create production numbers and write the numbers back to the database. The create production number option saves the new production numbers to the new or appended .cib file and writes the beginning and ending production numbers for each document back to the Concordance database to cross-reference the information in the original record.

The Production Preferences options provide both whole number production numbers and productions numbers that include a suffix.

For example, the production has three documents (A, B, C) and document B contains four pages. The image below defines the production settings.

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: Default

1 Production Run Parameters

Document Range	All
Create Production Numbers	Yes
Prefix	DAR
Starting Number	000001
Add a Numeric Suffix	No
Use Production Numbers for File Names	Yes
Use Production Numbers for New Media Keys	Yes
Beginning Production Number Field	PRODBEG1
Ending Production Number Field	PRODEND1

2 Output Location Run Parameters

CIB Database Output Mode	Create
CIB File	C:\Concordance_Training\My_Databases\Production\
Root Destination Folder	C:\Concordance_Training\My_Databases\Production
Create Volume Folders	Yes
Prefix	PROD
Starting Number	0000001
Maximum Volume Size	650MB
Create File Folders	No
Production Output Type	TIFF Single Page [LZW - NOT compatible]

Production Output Type
Select either TIFF or PDF as the Production Output file type.

Headers / Footers

Edit Headers and Footers ☒ Include Hdr/Ftr Spec.

Production Run Control

Start Help

Size: 580 x 764

The whole number production numbers are generated and written back to Concordance as follows:

Document	Begin Production Number	End Production Number
A	DAR000001	DAR000001
B	DAR000002	DAR000005
C	DAR000006	DAR000006

Productions with the suffix added, are generated and written back to Concordance as follows:

Document	Begin Production Number	End Production Number
A	DAR000001.0001	DAR000001.0001
B	DAR000002.0001	DAR000002.0004
C	DAR000003.0001	DAR000005.0001

Each document is produced with the corresponding production and page number. Therefore, in the above example, each page of document B is produced with one of the following production numbers: DAR000002.0001, DAR000002.0002, DAR000002.0003, DAR000002.0004.

Production is the generation of a sub-set of document TIFF or PDF files, some of which have been redacted. Similar to other batch processes in Concordance, Concordance production parameter settings can be saved and used each time you create a production.

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: Default

1 Production Run Parameters

Document Range	All
Create Production Numbers	Yes
Prefix	DAR
Starting Number	000001
Add a Numeric Suffix	No
Use Production Numbers for File Names	Yes
Use Production Numbers for New Media Keys	Yes
Beginning Production Number Field	PRODBEG1
Ending Production Number Field	PRODEND1

2 Output Location Run Parameters

CIB Database Output Mode	Create
CIB File	C:\Concordance_Training\My_Databases\Production\
Root Destination Folder	C:\Concordance_Training\My_Databases\Production
Create Volume Folders	Yes
Prefix	PROD
Starting Number	0000001
Maximum Volume Size	650MB
Create File Folders	No
Production Output Type	TIFF Single Page [LZW - NOT compatible]

Production Output Type
Select either TIFF or PDF as the Production Output file type.

Headers / Footers

Edit Headers and Footers ☒ Include Hdr/Ftr Spec.

Production Run Control

Start Help

Size: 580 x 764

Before starting a production run, you need to run a query to locate all the documents for the production, then define the production run parameters or load a saved parameter set.

To run a production:

1. If you have not done so already, run a search query to locate the documents you want to produce. See, Locating documents to produce.
2. Create a directory folder to store the production files.
3. In Concordance, from the **Tools** menu, click **Production**.
4. Specify the following production parameters:

To set production run parameters:

1. From the **Production Run Parameters** section, in the **Document Range** list, click one of the following:
 - To include all the documents in the query, click **All**.
 - To include a selected set of documents from the query, select **Range**, and then specify the range of documents you want to produce. The default range is the complete range of documents in the current Concordance query.
2. To create production numbers, do the following:
 - In the **Create Production Numbers** field, click **Yes**.
 - 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.
 - 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.

The Starting Number field accepts a zero-filled number up to 10 digits in length (maximum number of two billion).

- In the **Add a Numeric Suffix** field, click **Yes** or **No** to add an incrementing numeric value to a production number for each page in a document.

When adding a numeric suffix, the pages within document will be produced with a beginning .0001 suffix and incremented accordingly. Therefore, if a single document within the production set contains more than 10000 pages, page 9999 will contain the suffix .9999 and page 10000 will contain the suffix .10000. This may cause sorting issues for other applications used to view documents/images if not loaded into the application with a corresponding OPT file.

- In the **Use Production Numbers for File Names**, click **Yes** or **No** to replace the current file name with the generated production number.
- In the **Use Production Numbers for New Media Keys**, click **Yes** or **No** to replace the current media key with the generated production number in the .cib file you specified.
- In the **Beginning Production Number** list, click the field you want to use to store the beginning production number in the corresponding Concordance database.
- In the **Ending Production Number** list, click the field you want to use to store the ending production number in the corresponding Concordance database.

When producing single-page .tiff formatted files, the Use Production Numbers for File Names and Use Production Numbers for New Media Keys options must be set to Yes.

As a best practice, when you write the production beginning and ending numbers back to Concordance, select an empty field to ensure that the numbers do not append a field with existing data. If the production number appends to an existing field, the numbers may truncate if the content exceeds the field length.

To set the output location parameters:

1. In the **Output Location Run Parameters** section, in the **CIB Database Output Mode** list, do one of the following:
 - To add the documents to an existing CIB database, click **Append**.
 - To create a new CIB database, click **Create**.
2. To generate the CIB database file to store references to the production files, in the **CIB File** field, do one of the following:
 - To append a current CIB database, click **Browse** , and then navigate to and select the CIB file you want to append.
 - To create a new CIB database, click **Browse** , navigate to where you want to store the file, and then enter a new .cib file name and click **Open**.
3. To specify location where the output files are to be stored, in the **Root Destination Folder** field, click **Browse** , and then navigate to and select the folder.

The Root Destination Folder path including the folder name should not exceed 250 characters as this may cause the application to close unexpectedly.

4. To create volume folders for the production files, in the **Create Volume Folders** list, click **Yes**, and then do the following:
 - In the **Prefix** field, type the prefix you want to use to precede the volume number. The prefix can be any combination of letters, numbers, or punctuation; however, the characters must be valid folder and file name characters.
 - In the **Starting Number** field, type the number, you want to use for the starting number for the volume folders.
 - In the **Max Volume** list, click the maximum size for the folders or create a custom size.

The contents of the volume directories can be copied to a CD or DVD for distribution. If you plan to copy the production files to a CD or DVD, make sure that you know the the recording capacity of the CD or DVD prior to setting the Max Volume value. This ensures that the entire contents of the volume can be copied without running out of disk space.

After a volume fills to the maximum size, a new volume folder is created and, if requested, will continue sequentially. Production files will not be split across volumes.

5. To organize the production files within the volume folder, in the **Create File folders** list, click **Yes**, and then do any of the following:
 - In the **Prefix** field, type the prefix you want to use precede the file folder number. The prefix can be any combination of letters, numbers, or punctuation.
 - In the **Starting Number** field, enter the number, you want to use as the starting number for the file folders. Zero fill your starting number to determine the desired number width.
 - In the **Maximum Record Count** field, type the maximum number of records to include in each folder.
 - To use the first file name in each folder as the folder name, click **Yes**.
6. To specify the output type and image compression, in the **Production Output File Type** list, do one of the following:
 - Click **PDF Single Page** to convert the documents to single-page .pdf formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.
 - Click **PDF Multi Page** to convert documents to multi-page .pdf formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.
 - Click **TIFF Multi Page (LZW - Color)** to convert the documents to multi-page LZW compressed .tif formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.
 - Click **TIFF Single Page (LZW - Color)** to convert the documents to single-page LZW compressed .tif formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.
 - Click **TIFF Multi Page (Black & White)** to convert the documents to multi-page CCITT Group-4 compressed .tif formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.
 - Click **TIFF Single Page (Black & White)** to convert the documents to single-page CCITT Group-4 compressed .tif formatted files that can be loaded into a new or existing Concordance Native Viewer imagebase.

LZW compression produces a small file size image, which cannot be used with Concordance Image.

7. To specify the output color settings, from the **Color Settings** list, select one of the following:
 - To convert the documents to shades of gray, click **Grayscale**.
 - To produce the files with original colors, click **Color**.
8. From the **Fit Image Inside Headers/Footers** list, click **Yes**.

This option reduces the size of the produced document or image to accommodate the space needed for the number of lines of text and font size for the specified headers and footers.

9. To generate a .opt file for the production files, do the following:
 - In the Create OPT file, click **Yes**.
 - Click the **Output path for OPT file** field, click **Browse** , and then navigate to and enter a name for the .opt file.

It is recommended that you create an OPT file when using the Numeric Suffix option to ensure the produced documents/images can be loaded properly in Concordance Native Viewer and Concordance Image, as well as other Viewer applications.

 To specify markup types to include in the production:

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

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

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

 To set header/footer and watermark parameters:

1. In the **Headers/Footers** section, to include a header, footer, or watermark within the output files, select the **Include Hdr/Ftr Spec** check box.
2. Click the **Edit Headers/Footers** button, and then type the information you want to include. For more information about editing headers, footers and watermarks, see Editing headers/footers and watermarks.

If you specified to create production numbers in the production parameter settings, you need to add the %BatesPgNo() macro to one of the header or footer folders. See the list of Available Macros.

3. When finished, click **OK**.

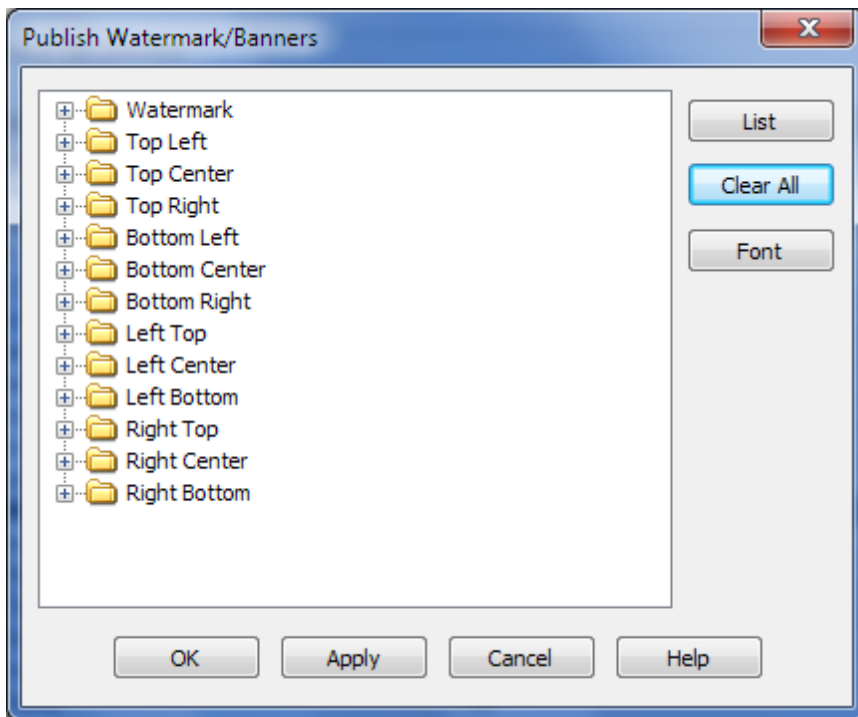
Printing and Production headers/footers and watermark settings are separate entities. Parameters you set in the CNV Printing dialog box are only available for printing.

5. After all production parameters have been specified, click **Start**.
6. Verify the header/footer and watermark settings, and then click **Ok**.

The **Production Control** dialog box opens. For more information about the **Production Control** dialog box, see Monitoring the production run.

7. When the production is finished, in the **Production Control** dialog box, click **Close**.

Headers and footers are a string of text assigned to a specific location within a document. Headers and footers contain information such as date, time, page number, user name, etc. For productions and printing, the text is not restricted to just the top and bottom of a document, you can also place them in the right and left the margins of a document. Each margin may be 10 lines deep giving you 120 individual strings of text.



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

PRIV

**Fidelity Security Bank
Internal Note**

Attorney's Eyes Only

RE: Goniff J.A. Cash Flows for 1982-83

TO DO

1. Compare estimated cash flow with actuals (1982/83)
2. Compare June 1983 balance sheet with July 1982 and July 1983

NB. March 1983, Goniff, J.A. cash flow projections prepared as recently as 12/82 and 3/83 have not even come close to the co's actual results and therefore have little credibility.

03/83 Goniff J.A. trying to convert from reliance on milking to butter and cream sales.

1

Confidential

1

4/22/2011 10:57 AM

Similar to markups and redactions, headers, footers, and watermarks are integrated into a production file as a fixed element that cannot be moved, changed, or deleted.

To edit a header, footer or watermark:

1. In Concordance, from the **Tools** menu, click **Production**.
2. In the **Production Parameters** dialog box, select the **Include Hdr/Fts Spec** check box.
3. Click the **Edit Headers/Footers and Watermarks** button.
4. Click the (+) sign next to the Header/Footer folders or the watermark folder you want to edit.
5. For each header, footer, or watermark, do one of the following:
 - Type the text you want to be displayed.
 - Type **%** to display the available macros list, and then select the macro(s) you want to add.

Available macros:

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

- Each line of header or footer can use multiple macros. For example, you can add % Date %Time to the Top Left header. This prints 09/22/2010 02:10 PM in the location you specified on each page of the production.
- All macro values are case insensitive, except for the %FIELD_ macro, this must remain all uppercase.

When producing Concordance Native Viewer documents/images in Concordance, do not modify the %BatePgNo() macro as this will cause the creation of new production numbers to fail.

Macro	Description
%FIELD_	Inserts database field data up to 60 characters for a each specified field. For example, %FIELD_OCR1 %FIELD_OCR2, would produce the first 60 characters of the OCR1 field and the first 60 characters of OCR2 field. If security is enabled, only those fields with a minimum of "Read" access are displayed.
%Date	Inserts the current date
%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 production is executed based on a 12-hour clock
%MilTime	Inserts the current time the production is executed based on a 24-hour clock

%Title	Inserts the current title of the document
%Page	Inserts the page number
%TotalPages	Inserts the total number of pages
%BatesPgNo()	Indicates the starting number for each page within a document. The generated number is appended to the production number creating a unique document ID for each page of a document stored in the corresponding Concordance database. For example, a production run of three single page documents are generated as ABC00001, ABC00002, ABC00003.
%Login, %User	Inserts the user name of the person who executed the production
%Hostname	Inserts the hostname of the machine where the production was executed from
%IPAddress	Inserts the IP address of the machine where the production was executed from
%%	Inserts a single % character
©	Inserts a copyright symbol
®	Inserts a registered trademark

6. To edit the font for the all the text, click the **Font** button, and then in the **Font** dialog box, specify the font name, style, and size.

 Overlapping of text in headers and footers may occur if the specified font size is too large.

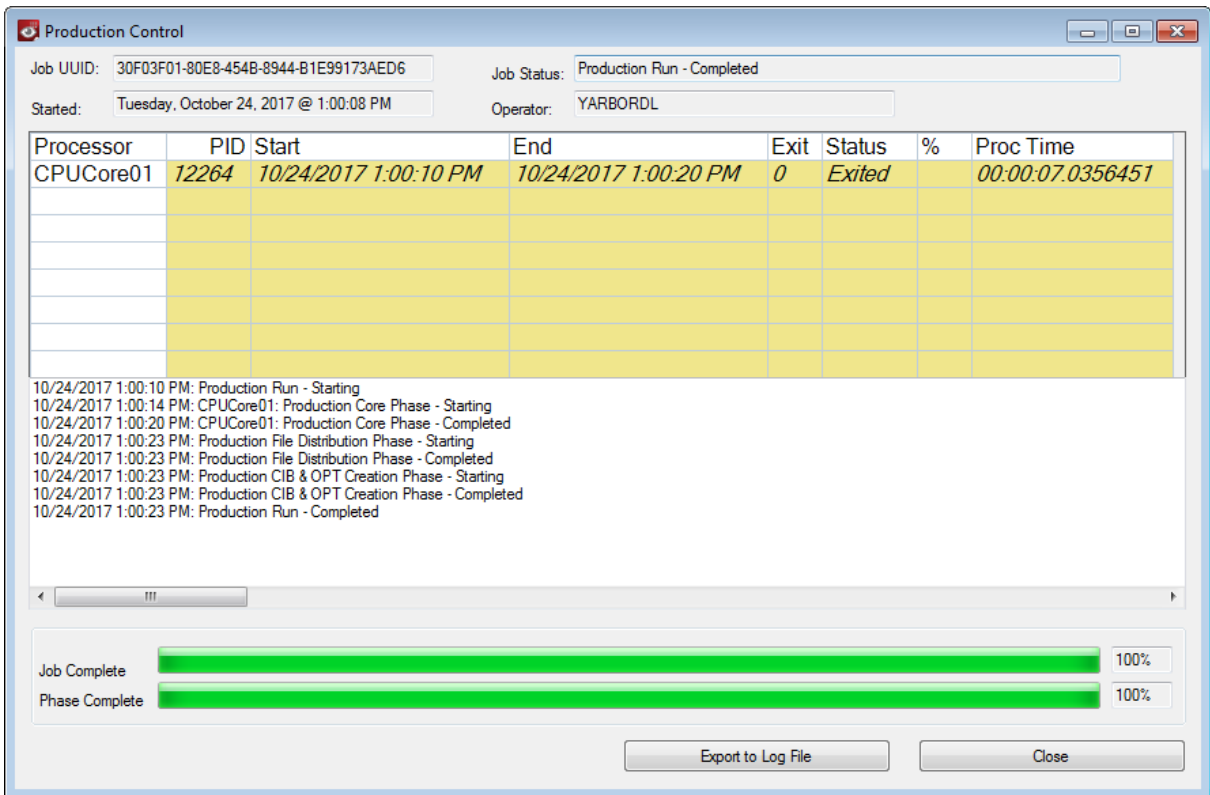
7. Click **List** to review the applied header/footer and watermark text and macros set for the production.
8. Click **Edit** to make any changes.
9. When finished, **OK**.

 Production and Printing headers/footers and watermark settings are separate entities. Parameters you set in the Production dialog box are only available for production.

When a production is executed, the Production Console is displayed. The production control displays the progress of the files as they are converted, distributed to the production volumes and file folders, creation of the CIB and OPT files, and production information written back to the specified fields in Concordance.

Export to Log File

1. If you want any error messages encountered during the production to be written to a log file, select the **Export to Log File** option.
2. Navigate to where you want to save the log, in the **File name** field, type the log name and click **Save**.



Production Control

Job UUID: 30F03F01-80E8-454B-8944-B1E99173AED6 Job Status: Production Run - Completed

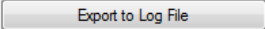
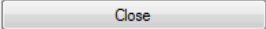
Started: Tuesday, October 24, 2017 @ 1:00:08 PM Operator: YARBORDL

Processor	PID	Start	End	Exit	Status	%	Proc Time
CPUCore01	12264	10/24/2017 1:00:10 PM	10/24/2017 1:00:20 PM	0	Exited		00:00:07.0356451

10/24/2017 1:00:10 PM: Production Run - Starting
 10/24/2017 1:00:14 PM: CPUCore01: Production Core Phase - Starting
 10/24/2017 1:00:20 PM: CPUCore01: Production Core Phase - Completed
 10/24/2017 1:00:23 PM: Production File Distribution Phase - Starting
 10/24/2017 1:00:23 PM: Production File Distribution Phase - Completed
 10/24/2017 1:00:23 PM: Production CIB & OPT Creation Phase - Starting
 10/24/2017 1:00:23 PM: Production CIB & OPT Creation Phase - Completed
 10/24/2017 1:00:23 PM: Production Run - Completed

Job Complete  100%

Phase Complete  100%

In order to save time for production runs that are similar in nature, you can save your production parameters for future use. You can also save a parameter set as the default settings, so that the next time you want to run a production, all the parameters are already predefined when you open the Production dialog box.

To save production parameters:

1. Specify all production parameters you want to save. See, Setting production parameters.
2. In the **Parameter Set Selection** section, in the **Parameter Set Selected** field, enter a

parameter set name.

3. Click **Save User Parameter** set.

 To save defined production parameters as the default set:

1. Specify all production parameters you want to save. See, Setting production parameters.
2. When finished, click **Save As Default Parameter Set**.

 To load a saved parameter set:

1. In Concordance, click **Tools**, and then click **Production**.
2. In the **Concordance Production** dialog box, from the **Parameter Set Selected** list, click the parameter set you want to use for the production.
3. Click **Load User Parameter Set**.

 To remove a saved parameter set:

1. In Concordance, click **Tools**, and then click **Production**.
2. In the Concordance Production dialog box, from the **Parameter Set Selected** list, click the parameter set you want to remove.
3. Click **Remove Current Parameter Set**.

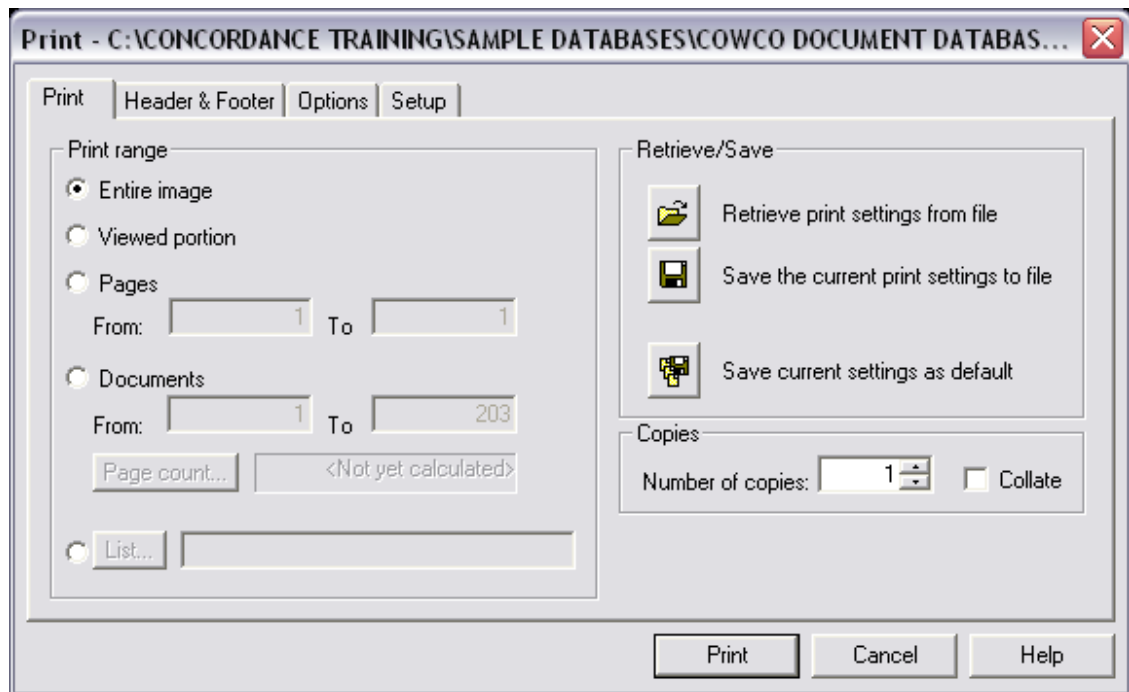
Producing images with Concordance Image

The fourth step in creating a production is to produce the images. Images are produced using the Production Wizard in Concordance Image. In the Production Wizard, you can produce images from scratch in the Production Wizard or use the Production Wizard settings from a previously saved production settings .psf file.

 To produce images using the Production Wizard:

1. Create a directory folder to store the production files.
2. In Concordance Image, on the **File** menu, click **Print**.

Clicking Print opens the Print tab in the Print dialog box.



3. On the **Print** tab, select the **Documents** option.

When you select the Documents option, the From and To fields and the Page count button become available.

4. Click the **Page count** button to calculate the total number of pages in your production set.
5. Make note of the number of pages you will be producing.

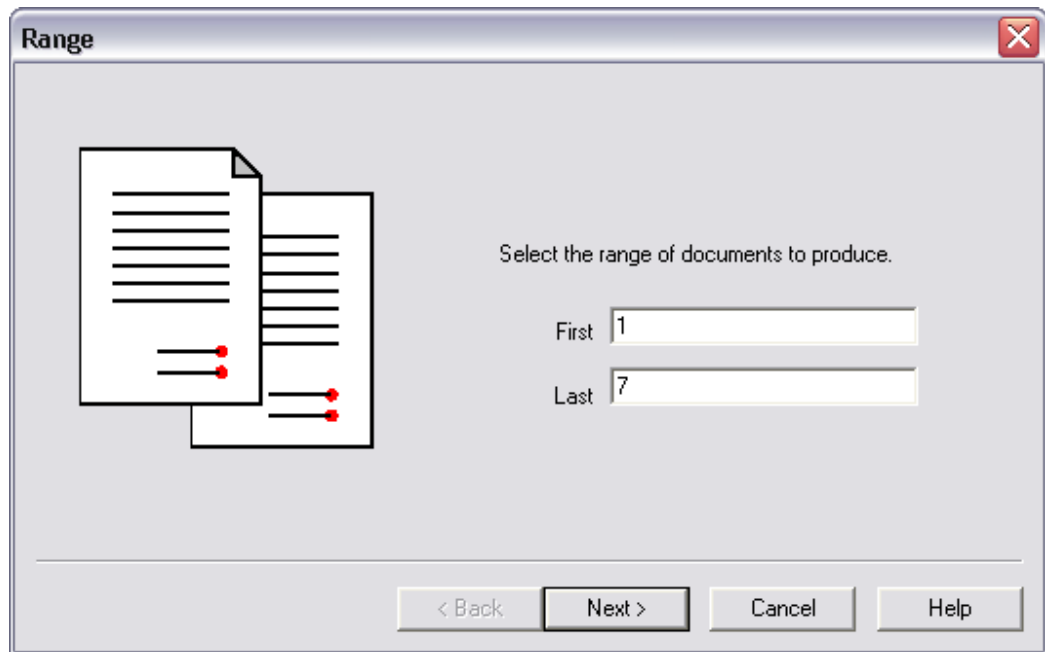
You need to know the number of pages in your production set to ensure that you have enough padding for the production numbers you will be creating later in the process.

6. Click the **Done** button to close the **Print** dialog box.
7. On the **Tools** menu, click **Produce**.



8. In the Production dialog box, the first time you create a production or when you want to run a production using new production settings, click the **Select this option to start the Production Wizard** button.
9. In the **Range** dialog box, define the production record range settings.

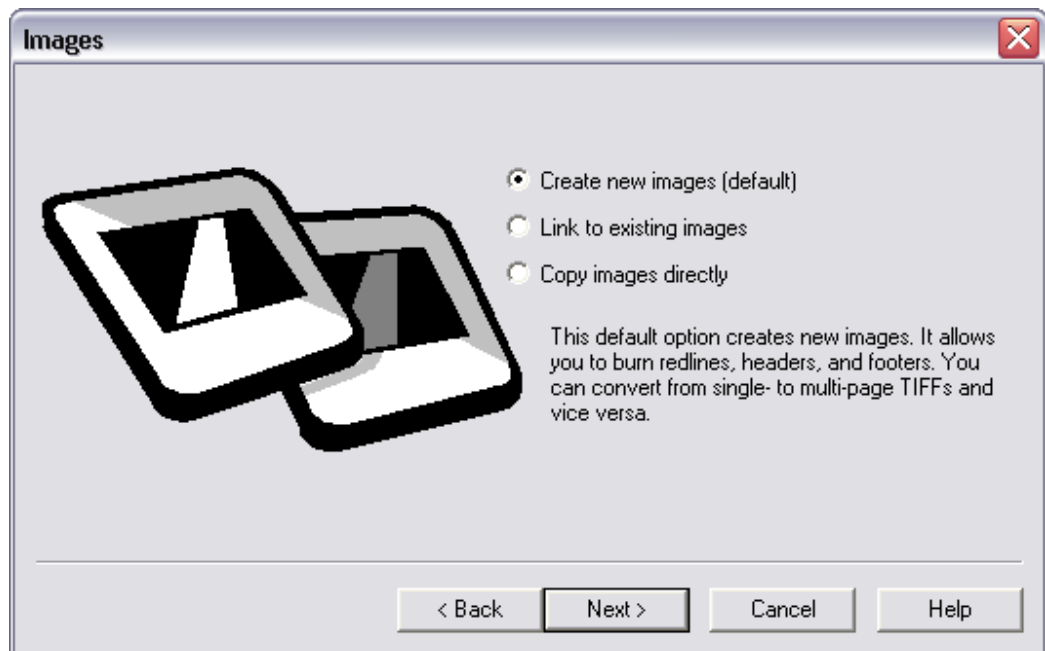
 To define the settings in the Range dialog box:

The image shows a software dialog box titled "Range". On the left side, there is a graphic of two overlapping documents with horizontal lines representing text. On the right side, the text "Select the range of documents to produce." is displayed above two input fields. The first field is labeled "First" and contains the number "1". The second field is labeled "Last" and contains the number "7". At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

In the Range dialog box, the First and Last fields default to the first and last record in the current Concordance query.

1. To modify the range of the records to be produced, in the **First** field, type the record number for the first record in the range you want to produce, and in the **Last** field, type the record number for the last record in the range you want to produce.
 2. Click **Next** to open the **Images** dialog box.
10. In the **Images** dialog box, define the production image settings.

 To define the settings in the Images dialog box:



1. Select one of the following options:

- **Create new images (default)** - creates new images based on the original images. It allows you to burn headers and footers as well as redlines onto the images. You can also convert from single to multi-page TIFFs and vice-versa. This is the default images setting.
- **Link to existing images** - creates a production set that links to the existing set of images. Most of the time you will also create an imagebase or log file that links to the subset of images you are producing. This option does not allow you to burn headers, footers, or redlines onto the images.
- **Copy images directly** - copies the image directly from the source directory to the destination directory, but you cannot burn headers, footers, or redlines onto the images. Typically, the **Copy images directly** option is not used for productions, but is used for large print jobs.

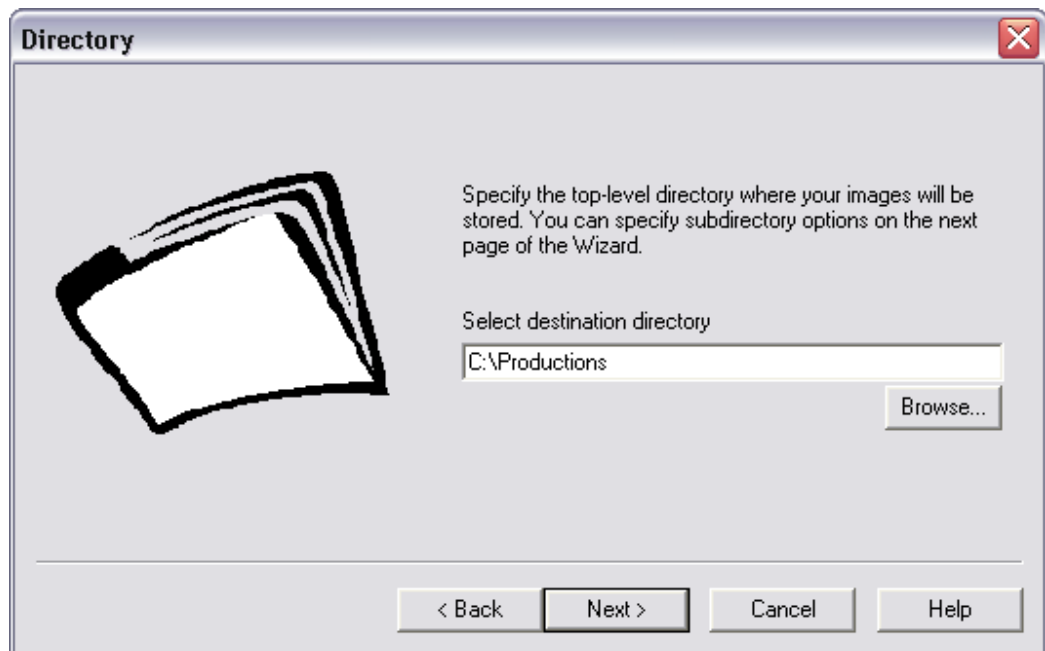
2. Click **Next**.

If you selected the Create new images (default) or Copy images directly option, clicking Next opens the Directory dialog box.

If you selected the Link to existing images option, clicking Next opens the Imagebase dialog box. When you select the Link to existing images option, you do not need to define settings in the Directory or Subdirectory dialog boxes. To fill out the Imagebase dialog box, skip ahead to step 13.

11. In the **Directory** dialog box, define the image directory settings.

☐ To define the settings in the Directory dialog box:



The Directory dialog box is used to specify the top-level directory where you want to save the production images.

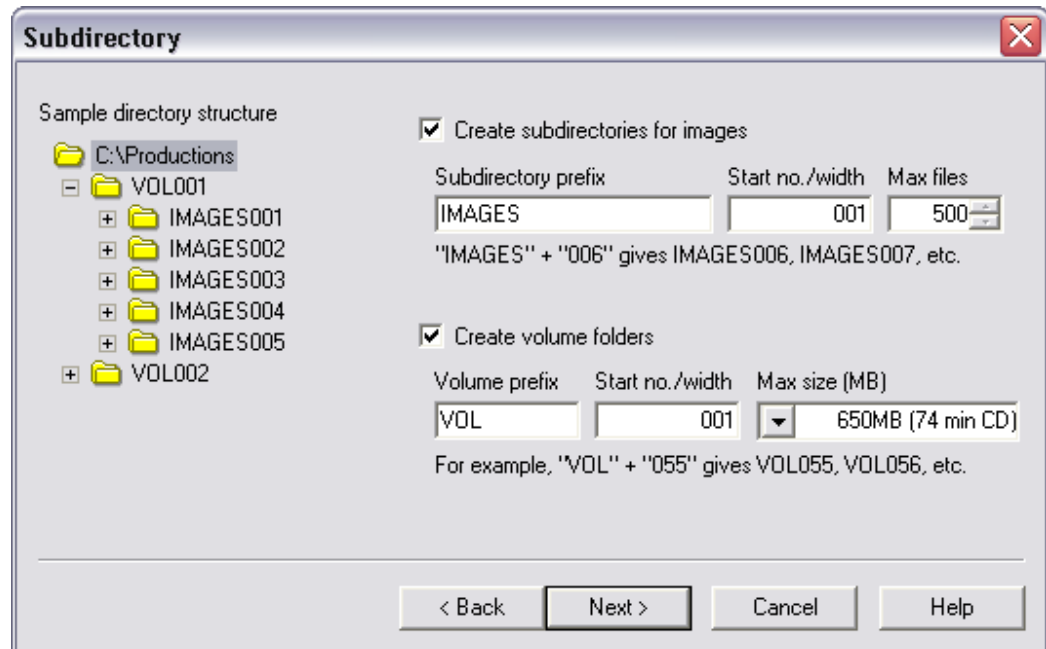
1. Click the **Browse** button to access the **Open** dialog box.
2. Navigate to and open the folder where you want to save the production images.

The folder directory is added to the Select destination directory field.

3. Click **Next** to open the **Subdirectory** dialog box.

12. In the the **Subdirectory** dialog box, define the image volume folder and subdirectory settings.

☐ To define the settings in the Subdirectory dialog box:



In the Subdirectory dialog box, you can create image subdirectories and volume directories in the top-level directory you specified in the Directory dialog box. If you create both image and volume subdirectories, volume directories are created below the top-level directory and image subdirectories are created below each volume directory. You can copy the contents of the volume directories directly to a CD or DVD for distribution.

Examples of image and volume subdirectories:

Image subdirectory example:

If you entered C:\temp\ in the Directory dialog box, and entered a subdirectory prefix of IMAGES and starting number and width of 00001 in the Subdirectory dialog box, your first image subdirectory will be labeled:

C:\temp\IMAGES00001

This directory will be filled with the maximum number of files you specified in the Max files field. Once this directory is filled, another image subdirectory is created:

C:\temp\IMAGES00002

This process is continued until all images have been copied. If you specify an imagebase, Concordance Image records the placement of these images so that they can be retrieved later on.

Volume directory with image subdirectories example:

Volume directories are created below the top-level directory. Subdirectories are created below each volume directory. For example, if you create volume directories with the prefix *VOL* and starting number width of *0005* (remember to zero fill), your first directory created would be:

If you entered *C:\temp* in the Directory dialog box, and entered a subdirectory prefix of *IMAGES* and starting number and width of *00001*, and entered a volume prefix of *VOL* and starting number and width of *0005* in the Subdirectory dialog box, your first volume directory and image subdirectory will be labeled:

C:\temp\VOL0005\IMAGES00001

After the image subdirectory fills, the next directory is created according to the subdirectory rules:

C:\temp\VOL0005\IMAGES00002

After the volume fills to the maximum size, a new volume directory is created and the subdirectories start renumbering from the beginning. Documents will not be split across volumes.

C:\temp\VOL0006\IMAGES00001

This process is continued until all images have been copied. If you specify an imagebase, Concordance Image records the placement of these images so that they can be retrieved later on.

1. Define the image subdirectory settings.

 To create image subdirectories:

1. Select the **Create subdirectories for images** check box.

The Subdirectory prefix field determines the prefix used in the image subdirectory folder name and defaults to *IMAGES*.

2. In the **Subdirectory prefix** field, type the prefix you want to use for the image subdirectory folder names.

The Start no./width field determines the starting number to use in the image subdirectory folder name and defaults to *001*.

3. In the **Start no./width** field, type the number you want to start with in the image subdirectory folder names. Zero fill your starting number to determine the desired number width.

The Max files field determines the maximum number of images files allowed in each image subdirectory folder and defaults to *500*.

4. In the **Max files** field, type or scroll to the maximum number of files you want to allow in each image subdirectory folder.

2. Define the image volume settings.

 To create volume directories:

1. Select the **Create volume folders** check box.

The Volume prefix field determines the prefix used in the image subdirectory folder name and defaults to **VOL**.

2. In the **Volume prefix** field, type the prefix you want to use for the volume subdirectory folder names.

The Start no./width field determines the starting number to use in the volume subdirectory folder name and defaults to 001.

3. In the **Start no./width** field, type the number you want to start with in the image subdirectory folder names. Zero fill your starting number to determine the desired number width.

The Max size (MB) field determines the maximum file size allowed for each volume subdirectory folder in megabytes and defaults to 650MB (74 min CD).

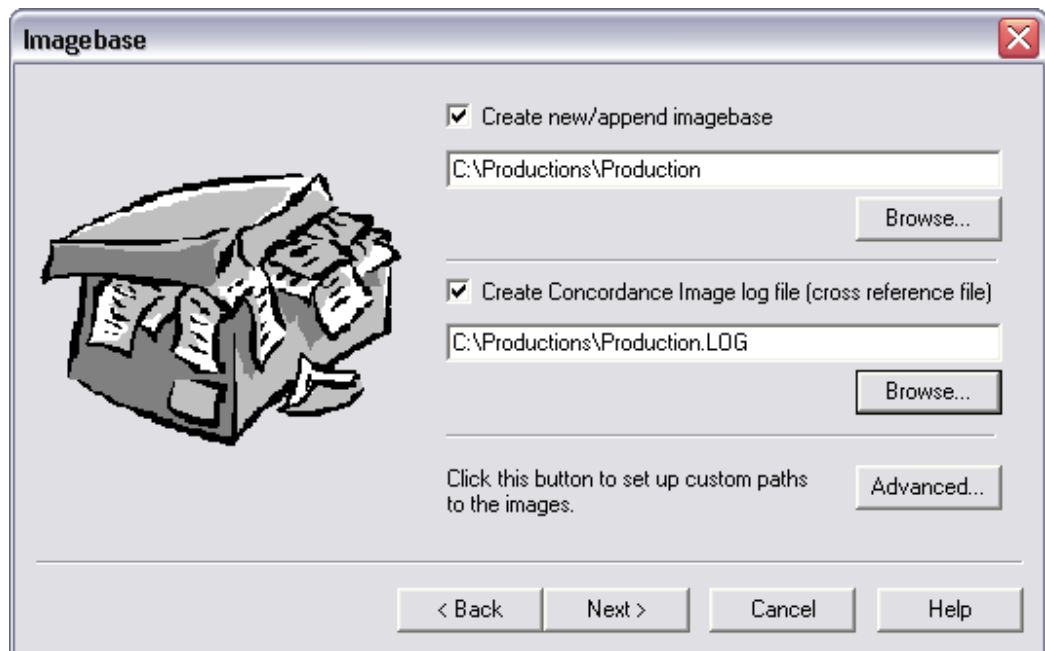
4. In the **Max size (MB)** field, select the maximum file size to allow in each volume subdirectory folder.

After a volume fills to the maximum size, a new volume directory is created and the image subdirectories start renumbering from the beginning. Documents will not be split across volumes.

3. When you have finished setting up the image subdirectories and/or volume directories, click **Next** to open the **Imagebase** dialog box.

13. In the **Imagebase** dialog box, define the production imagebase settings.

 To define the settings in the Imagebase dialog box:



1. To create an imagebase to store references to the images you are producing, select the **Create new/append imagebase** check box.

If you are referencing these images from a Concordance database, you need to create an imagebase. If you do not create an imagebase, the Production Wizard creates a subset of images with no database link.

2. Click the **Browse** button to open the **Save As** dialog box.
3. If you are creating a new imagebase, navigate to where you want to create the imagebase, in the **File name** field, type the imagebase name, and click **Save**.

Clicking Save opens the *File not found. Create as new?* message.

4. Click **Yes**.

Clicking Yes adds the imagebase file name and path to the imagebase directory field in the Imagebase dialog box.

5. If you are adding the production image information to an existing imagebase, navigate to and click the imagebase .dir file, and click **Save**.

Clicking Save adds the imagebase file name and path to the imagebase directory field in the Imagebase dialog box.

6. If you want Concordance Image to create a log file, select the **Create Concordance Image log file (cross reference file)** check box.

The .log log file created by Concordance Image contains the image alias, path and file name for each of the images in the imagebase. The Concordance Image .log file is a delimited ASCII file, and the log file can be used later to create an imagebase.

7. Click the **Browse** button to open the **Save As** dialog box.
8. If you are creating a new log file, navigate to where you want to save the file, in the **File name** field, type the log file name, and click **Save**.

Clicking Save opens the *File not found. Create as new?* message.

9. Click **Yes**.

Clicking Yes adds the .log file name and path to the log file directory field in the Imagebase dialog box.

10. If you are adding the production log file information to an existing log file, navigate to and click the Concordance Image log .log file, and click **Save**.

Clicking Save adds the log file name and path to the log file directory field in the Imagebase dialog box.

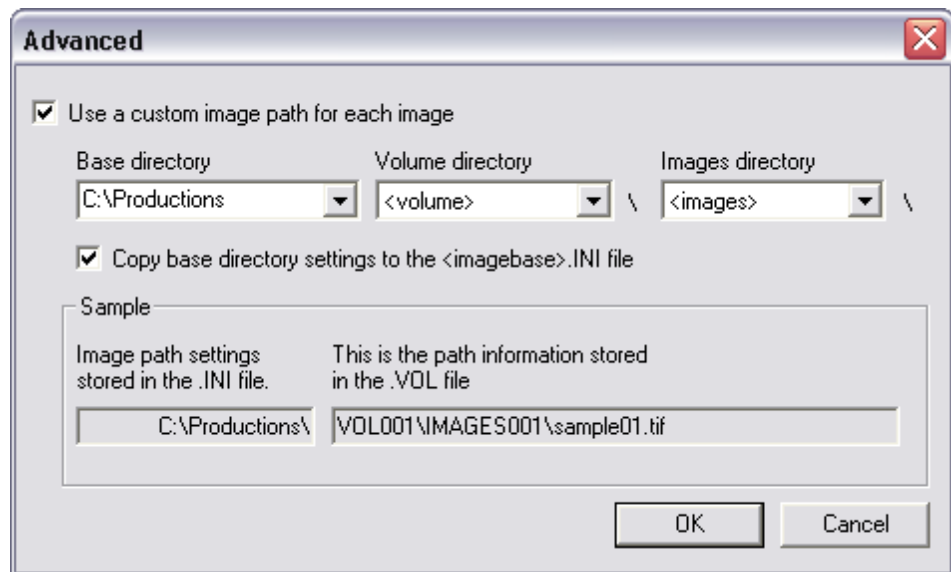
11. To create a custom image path for each image in the imagebase, click the **Advanced** button.

Clicking the Advanced button opens the Advanced dialog box.

12. Using the **Advanced** dialog box, you can have Concordance Image store partial paths to the images. By storing partial paths, vendors and clients can create imagebases for distribution that are ready for use on workstations.

☐ To create custom image paths:

1. In the **Advanced** dialog box, select the **Use a custom image path for each image** check box.



2. In the **Base directory** field, select the top-level directory where your

images will be stored.

The directory must be visible from the users' workstations. For example, if all your images will be on CD, you can set the base directory as D:\. This setting can be *hard-coded* into the path setting or can be a run-time setting that is stored in the .ini file.

If you do not know the final destination for the images, select <none> in the Base Directory field. Later, when you know the image path, you can add the image path to the imagebase on the Imagebase Management dialog box.

The Volume directory field defaults to <volume>. When <volume> is selected in the Volume directory field, the custom path organizes the images in volume directories. For example, D:\VOL001\sample01.tif.

3. If you do not want to include image volumes in your custom image path, in the **Volume directory** field, select **<none>**.

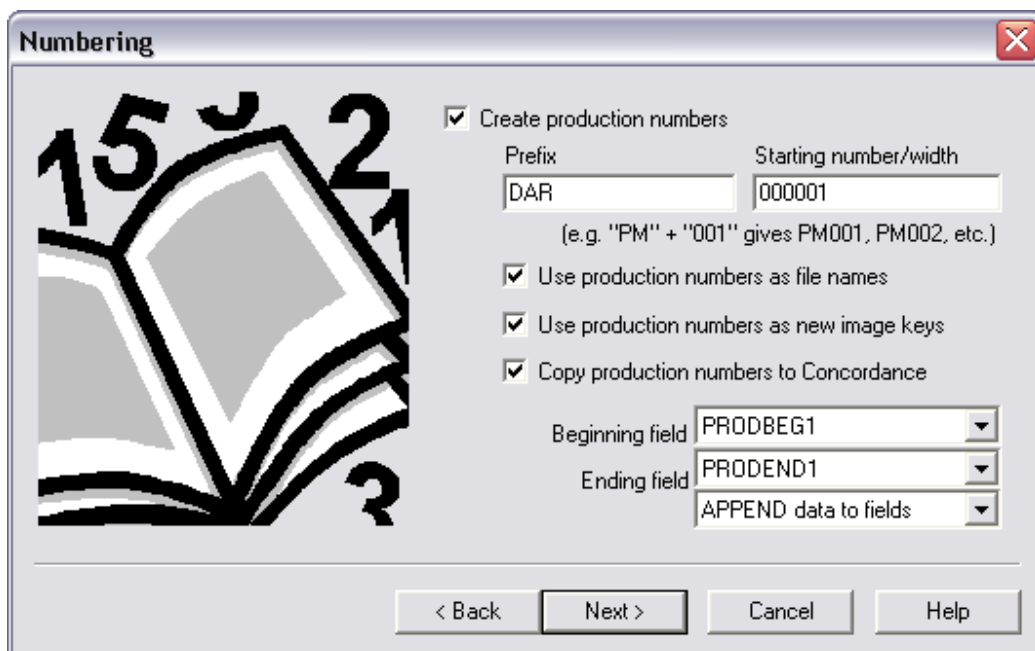
The Images directory field defaults to <images>. When <images> is selected in the Images directory field, the custom path will organize images in image subdirectories. For example, D:\IMAGES001\sample01.tif. If <volume> is selected in the Volume directory field and <images> is selected in the Images directory field, the custom path organizes images in image subdirectories within volume directories. For example, D:\VOL001\IMAGES001\sample01.tif.

4. If you do not want to include image subdirectories in your custom image path, in the **Images directory** field, select **<none>**.
5. To make the custom image path to be a run-time setting, select the **Copy base directory settings to the <imagebase>.INI file** check box.
6. Click **OK** to save your custom image path settings and close the **Advanced** dialog box.

13. Click **Next** to open the **Numbering** dialog box.

14. In the **Numbering** dialog box, define the production numbering settings.

 To define the settings in the Numbering dialog box:



The Numbering dialog box allows you to sequentially renumber the images of a production set.

1. To create production numbers for the production images, select the **Create production numbers** check box.
2. In the **Prefix** field, type the production number prefix.

The prefix precedes each production number and can be any combination of letters, numbers, or punctuation.

3. In the **Starting number/width** field, type the production number you want to start with. Zero fill your starting number to determine the desired number width.

The starting number must be padded to the correct number of digits. For example, if you have 1000 images, you should pad to at least 3 digits (000 to 999).

If you entered PM in the Prefix field and 0009 in the Starting number/width field, the first image will be numbered PM0009. The next image will be numbered PM0010. You must be careful to use an appropriate width for your starting number. If you have 1000 pages to produce, and start numbering from *PM01*, eventually you will run out of numbers. After the 99th page, your images will be incorrectly numbered.

4. To replace the image file names with the production numbers, select the **Use production numbers as file names** check box.

When the Use production numbers as file names check box is selected, Concordance Image renames the image using the same file extension. So if your image was previously named DF000001.tif and your production number is PM0009, your new image file name will be PM0009.tif.

5. To use the production numbers as image keys, select the **Use production numbers as new image keys** check box.

When the Use production numbers as new image keys check box is selected, the production numbers will be used to access the image from Concordance and is stored in the imagebase.

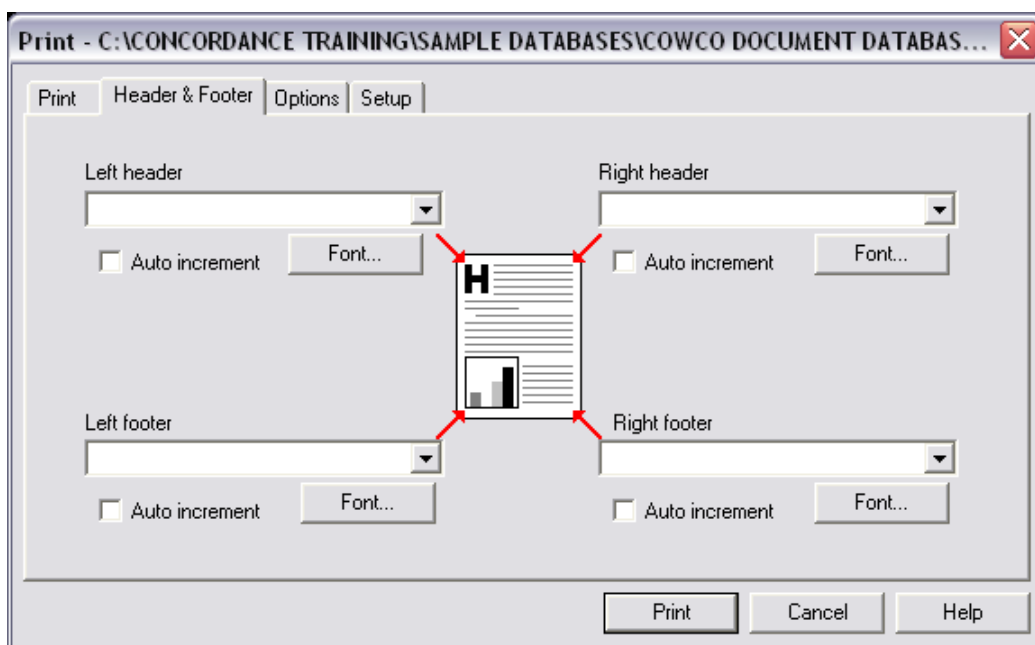
6. To store the beginning and ending production number for each document in the Concordance record, select the **Copy production numbers to Concordance** check box.
7. If you are copying the production numbers to Concordance, in the **Beginning field** field, select the field you want to use to store the beginning production number, in the **Ending field** field, select the field you want to use to store the ending production number, and to append the production numbers to the existing data in the fields, select **APPEND data to fields** or to overwrite existing data in the fields, select **OVERWRITE data in fields**.

If you do not specify an ending field, Concordance Image places both the beginning and ending production numbers in the field you selected in the Beginning field.

8. Click **Next** to open the **Header & Footer** dialog box.

15. In the **Header & Footer** dialog box, define the image header and footer settings.

 To define the settings in the Header & Footer dialog box:



The Header & Footer dialog box allows you to permanently place or *burn* headers and/or footers on any or all of the four corners of the production images. When you place headers and/or footers on a production image, the headers and footers

do not cover any portion of the image. Instead, the image is scaled to accommodate the headers and footers on the image.

Concordance only supports headers and footers in TIFF image files when creating images for a production. Concordance does not burn headers and footers onto non-TIFF images.

1. In the **Left header**, **Right header**, **Left footer**, and/or **Right footer** fields, type or select the header and/or footer text you want to place on the production images.

For each header and footer, you have three options for the text as shown in the following table:

 Header & Footer dialog box options and definitions

Header and Footer Option	Definition
Manually typed text	You can manually type any text in the field, such as Defendant, and this text will appear on all production images.
System command	You can select one of the following system commands from the header or footer drop-down list. The system commands are denoted by the angle brackets around the command (<Time>). • <Date & Time> – The date and time the image was produced • <Date> – The date the image was produced • <Document number> – The document number of the current image (<i>Document 4 of 10</i>) • <Image key> – The image key as it appears in Concordance • <Page number> – The current page number (<i>Page 1 of 4</i>) • <Time> – The time the image was produced Concordance Image will automatically format and add the appropriate text for the selected system command.
Concordance field	If there is an active link to the associated documents in Concordance, the drop-down list contains a list of the Concordance fields. You can select a Concordance field to place the contents (up to the first line and first 60 characters) of a Concordance field into a header or footer.

2. To increment a header or footer value, select the **Auto increment** check box.

Concordance Image can add an auto-incrementing header and footer. If the Auto increment check box is selected, for each image, Concordance Image will

increment the header or footer by 1. For example, if you type the header text PM-00001 and select the Auto increment check box, Concordance Image prints the text PM-00001 on the first image, print PM-00002 on the second image, and so on. This feature is helpful for creating sequentially numbered production sets.

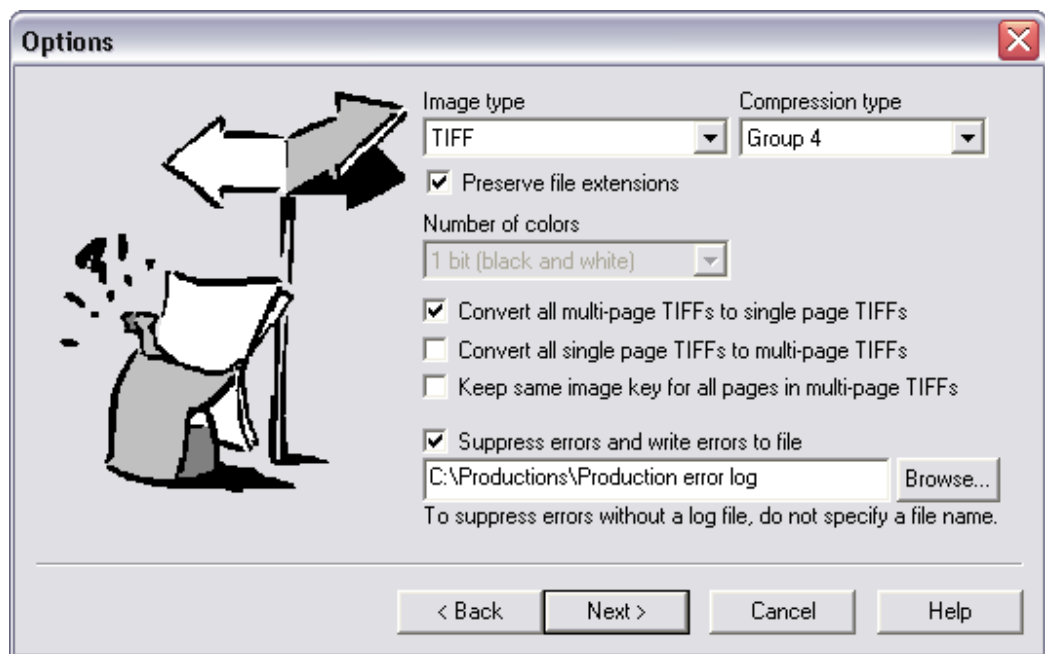
3. To customize the header or footer text font, click the **Font** button.

Clicking the Font button opens the Font dialog box. Modify the font settings and click OK to apply the custom font settings.

4. Click **Next** to open the **Options** dialog box.

16. In the **Options** dialog box, define the image file type settings.

 To define the settings in the Options dialog box:



The Options dialog box allows you to define the type of image file to create during the production, the single or multi-page TIFF file settings, and the error log settings.

1. In the **Image type** field, select the image file type to create.

For a complete list of the supported image file types and their associated compression and color types, see the "Selecting Image File Types" section in the Creating a production topic.

2. In the **Compression type** field, select the image compression type.

The compression types available for selection in the Compression type field are determined by the image field type selected in the Image type field.

3. To preserve the file extensions, select the **Preserve file extensions** check box.
4. In the **Number of colors** field, select the image colors you want to use for the images.

The image color available for selection in the Numbers of colors field are determined by the image field type selected in the Image type field.

5. To convert all multi-page TIFF files to single-page TIFF files, select the **Convert all multi-page TIFFs to single page TIFFS** check box.

In order to properly convert multi-page TIFF files to single-page TIFF files, your images should be properly named with a numeric suffix. For example, PM0001.tif as opposed to PM0001a.tif.

6. To convert all single-page TIFF files to multi-page TIFF files, select the **Convert all single page TIFFs to multi-page TIFFS** check box.
7. To use the same image key for all pages in multi-page TIFF files, select the **Keep same image key for all pages in multi-page TIFFs** check box.
8. If you want any error messages during the production to be suppressed and have the errors written to an error log file, select the **Suppress errors and write errors to file** check box.

If you want error messages to be displayed while the production runs, clear the Suppress error and write errors to file check box.

9. Click the **Browse** button to open the **Open** dialog box.
10. Navigate to where you want to save the error log, in the **File name** field, type the error file name, and click **Open**.

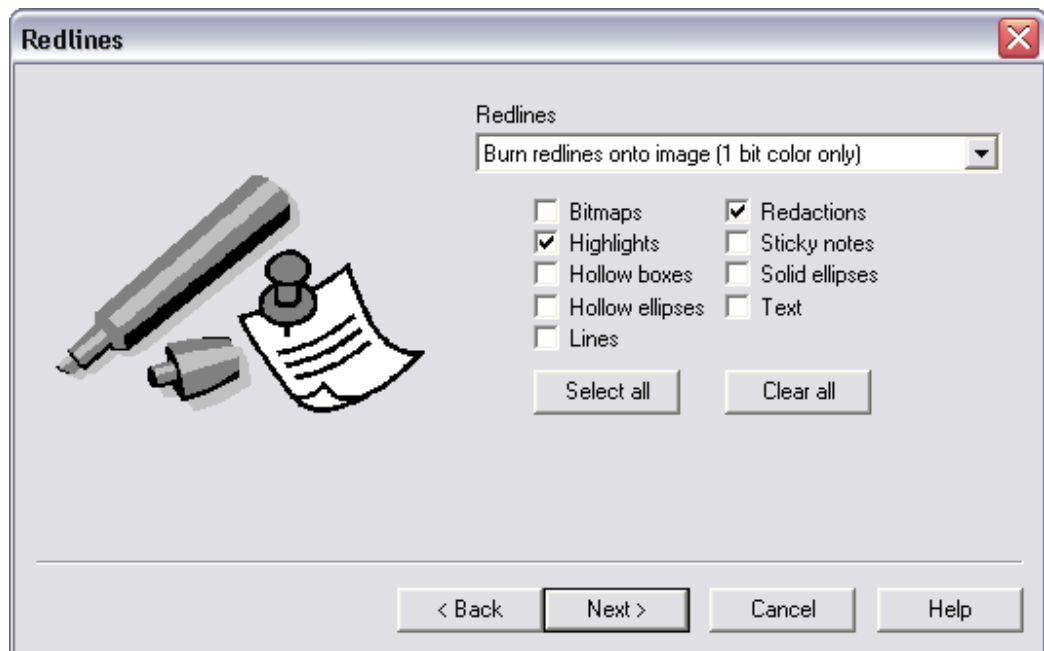
Clicking Open adds the error log text file name and directory to the Options dialog box.

To suppress the error messages without generating an error log file, leave the error log directory field blank.

11. Click **Next** to open the **Redlines** dialog box.

17. In the **Redlines** dialog box, define the image redlines settings.

 To define the settings in the Redlines dialog box:



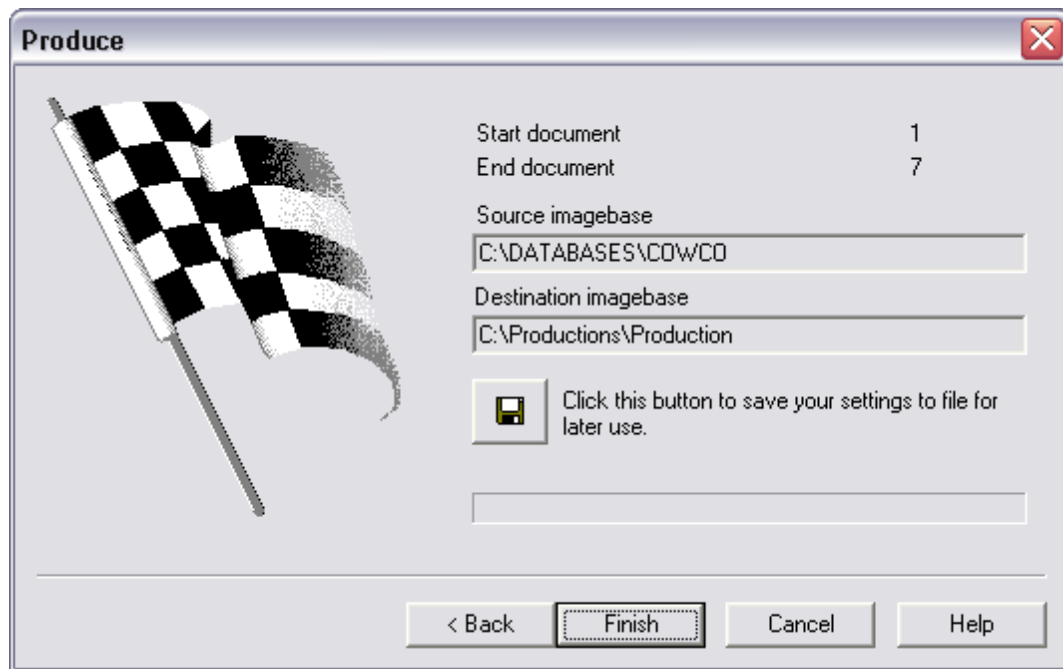
The Redlines dialog box allows you to define the redlines settings for the production.

1. In the **Redlines** field, select one of the following options:
 - **No redlines** - ignores all redlines on the images being produced. No redlines will be burned onto the images and will not be saved to a redlines database. When No redlines is selected, the redlines check boxes are unavailable in the Redlines dialog box.
 - **Copy redlines to redlines database** - copies the redlines from the images you are producing to a redlines database. A redlines database is a database that tracks redlines for each image in the imagebase. Whenever you add or move redlines on an image, the redlines database is updated. If you select this option, redlines for the produced images can be moved, deleted, and altered.
 - **Burn redlines onto image (1 bit color only)** - redlines are permanently placed or *burned* onto the produced images. Redlines become permanent parts of the produced image. Overlays on the new set of images, such as redactions or highlights, cannot be moved, deleted or altered in any way.
2. If you selected the **Copy redlines to redlines database** or the **Burn redlines onto image (1 bit color only)** in the **Redlines** field, select the check box for the redlines you want to copy to the redlines database or burn onto the images, and clear the check boxes for the redlines that you do not want to copy or burn.

To select every redlines check box, click the Select all button. To clear every redlines check box, click the Clear all button.

3. Click **Next** to open the **Produce** dialog box.

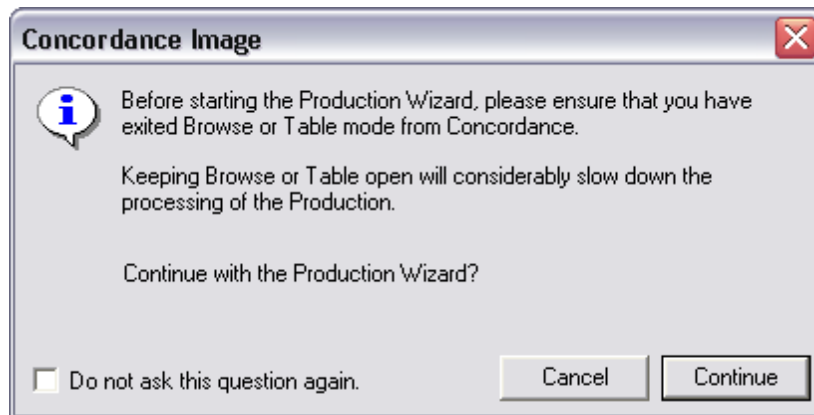
After defining the production redlines settings and clicking Next, the Produce dialog box opens. The Produce dialog box displays the start and end document numbers and the production's source and destination imagebase file names and directories.



18. To save your Production Wizard settings for future productions, click the save button in the **Produce** dialog box. For more information, see the To save your Production Wizard settings section in this topic.

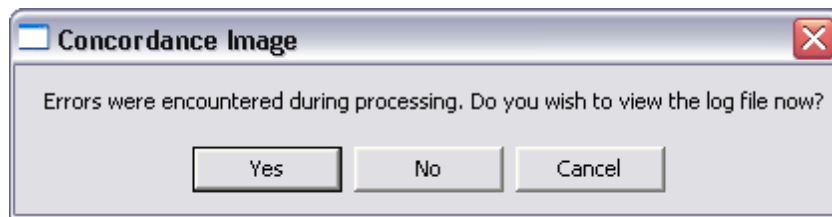
19. To produce the images, click the **Finish** button.

Clicking the Finish button opens the following message:



20. If you have the **Browse** and/or **Table** view open in Concordance, close the **Browse** and/or **Table** view in Concordance and click the **Continue** button.

If the Production Wizard encounters errors, the following message is displayed:



21. To view the error log, click **Yes**. If you do not want to view the error log, click **No**.

22. When the image production is completed, click the **Done** button to close the **Produce** dialog box.

After completing the image production, it is best practice to export the production numbers and other necessary field data from Concordance to a delimited text file. This information may be needed later for opposing counsel or an internal production review. For more information about exporting Concordance field data to a delimited text file, see [Exporting delimited text files](#).

 To save your Production Wizard settings:

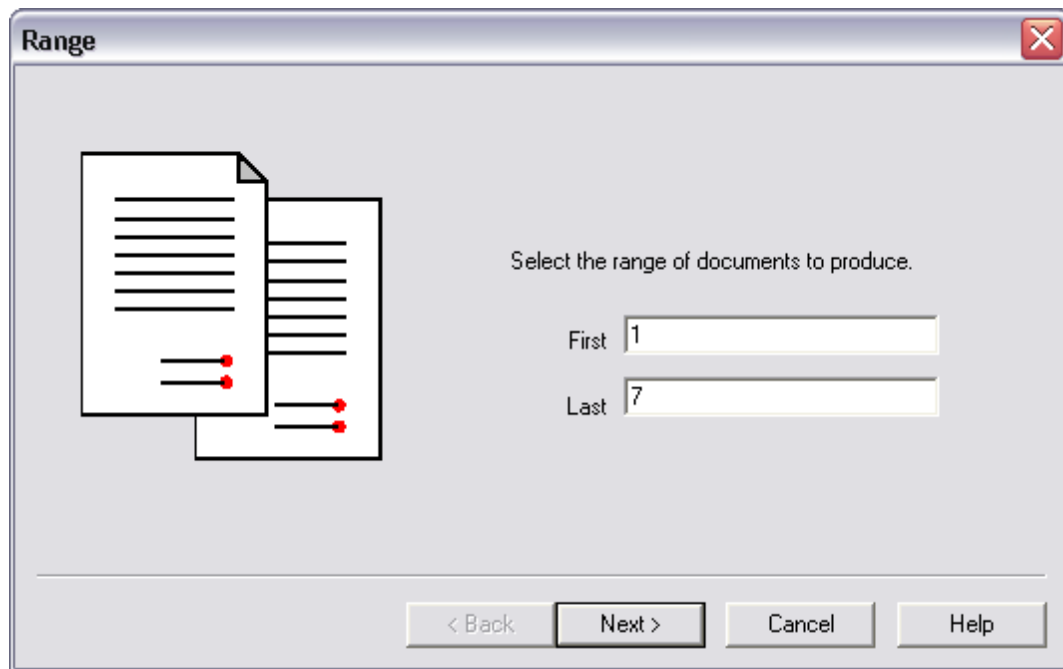
1. On the **Tools** menu, click **Produce**.

Clicking Produce opens the Production dialog box.



2. Click the **Select this option to start the Production Wizard** button.

Clicking the Select this option to start the Production Wizard button opens the Range dialog box.

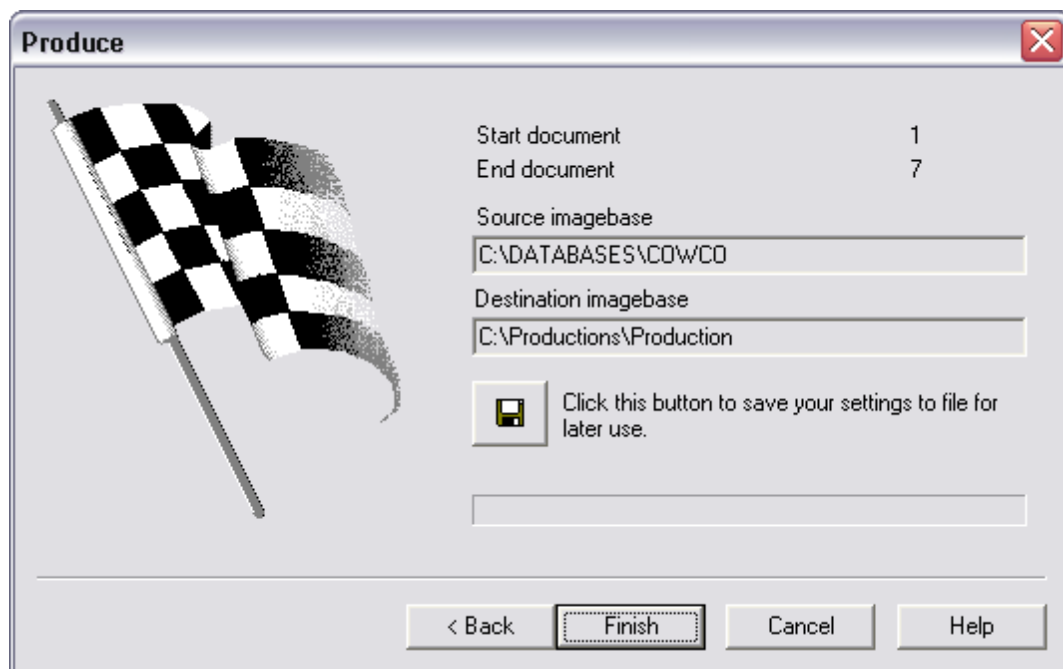


3. Define your production settings in each of the Production Wizard dialog boxes.

For more information about filling out each of the Production Wizard dialog boxes, see the To produce images using the Production Wizard section in this topic.

4. Click the save button in the **Produce** dialog box.

The Produce dialog box is the last dialog box in the Production Wizard.



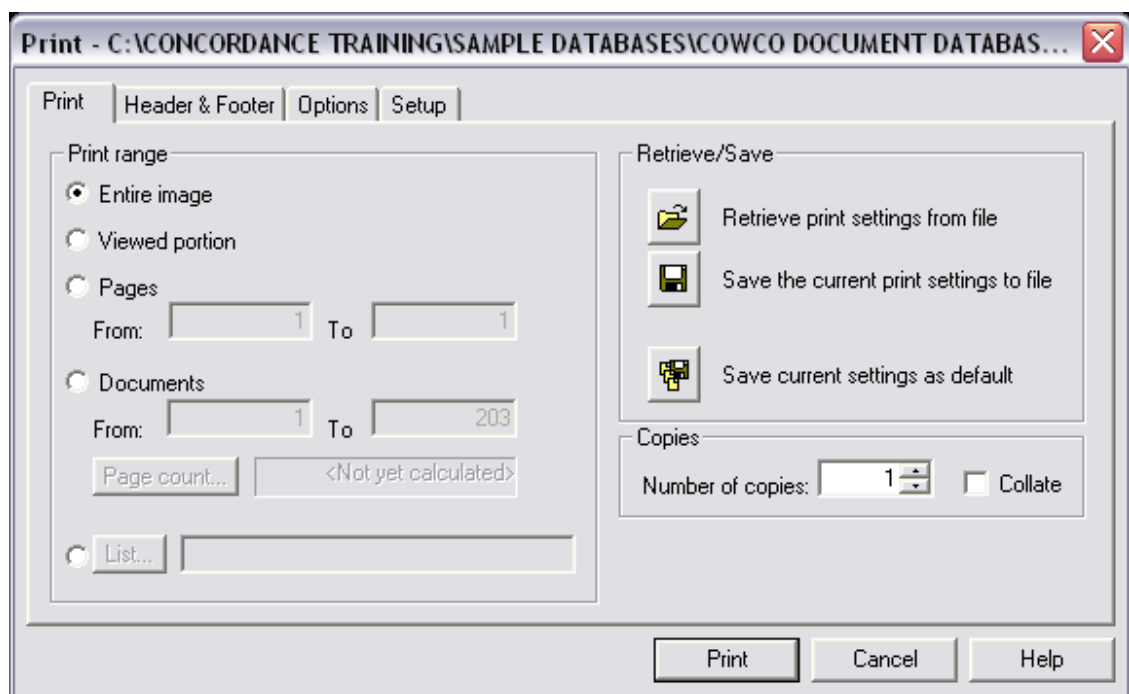
5. Clicking the save button opens the **Save As** dialog box.
6. Navigate to where you want to save the file, in the **File name** field, type the production settings file name, and click **Save**.

Clicking Save saves all the production settings. The production settings file can be used to create future productions using the same settings. The production settings file uses the .psf file extension. For more information about producing images using a production settings file, see the To produce images using an existing production settings file section in this topic.

 To produce images using an existing production settings file:

1. Create a directory folder to store the production files.
2. In Concordance Image, on the **File** menu, click **Print**.

Clicking Print opens the Print tab in the Print dialog box.



3. On the **Print** tab, select the **Documents** option.
When you select the Documents option, the From and To fields and the Page count button become available.
4. Click the **Page count** button to calculate the total number of pages in your production set.
5. Make note of the number of pages you will be producing.

You need to know the number of pages in your production set to ensure that you have

enough padding for the production numbers you will be creating later in the process.

6. Click the **Done** button to close the **Print** dialog box.
7. On the **Tools** menu, click **Produce**.

Clicking Produce opens the Production dialog box.



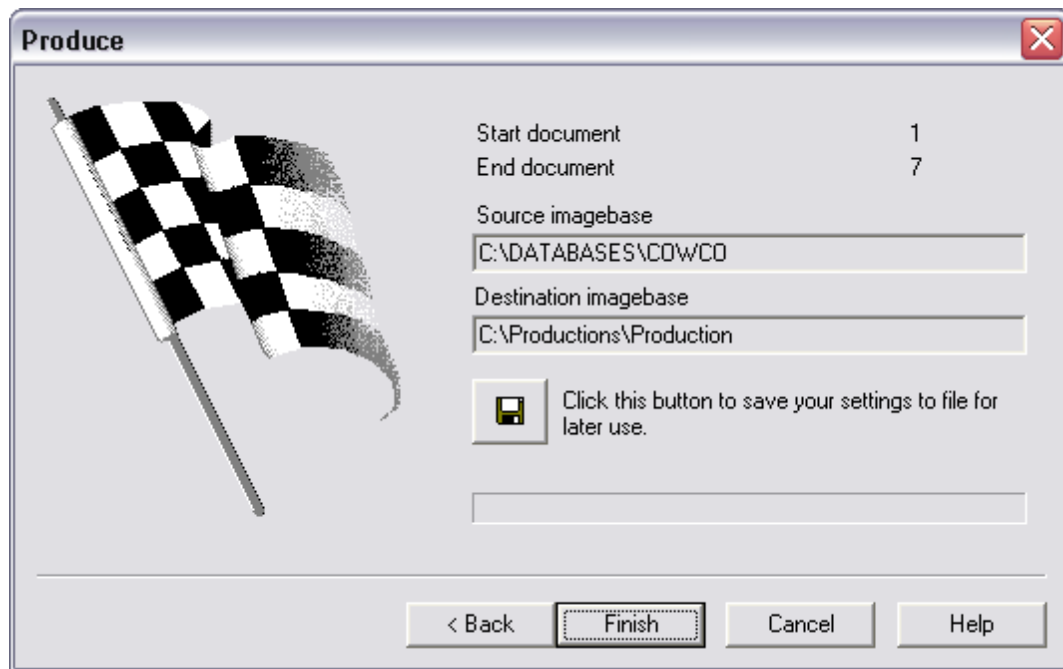
8. Click the **Select this option to open an existing Production settings file** button.

Clicking the Select this option to open an existing Production settings file button opens the Open dialog box.

9. Navigate to and open the production settings .psf file you want to use to create the production.

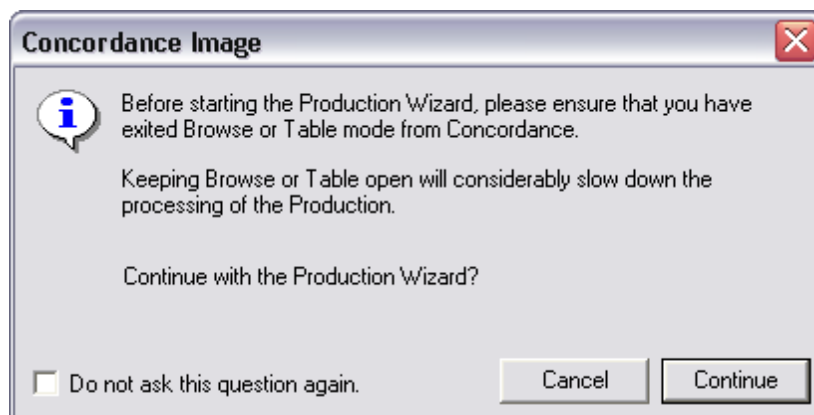
The Produce dialog box opens in the Production Wizard.

Each dialog box in the Production Wizard contains the settings saved to the .psf file you opened. The Produce dialog box displays the start and end document numbers and the production's source and destination imagebase file names and directories.



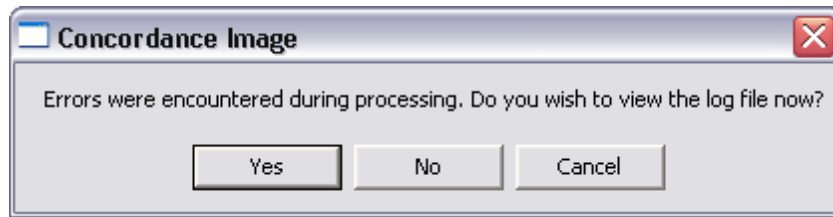
10. If you need to modify any of the settings, such as the production document range, imagebase, or redlines settings, click the **Back** button in the **Produce** dialog box to locate the settings you want to change, make the applicable changes, and click the **Next** button until you return to the **Produce** dialog box.
11. To save your Production Wizard settings for future productions, click the save button in the **Produce** dialog box. For more information, see the To save your Production Wizard settings section in this topic.
12. To produce the images, click the **Finish** button.

Clicking the Finish button opens the following message:



13. If you have the **Browse** and/or **Table** view open in Concordance, close the **Browse** and/or **Table** view in Concordance and click the **Continue** button.

If the Production Wizard encounters errors, the following message is displayed:



14. To view the error log, click **Yes**. If you do not want to view the error log, click **No**.

15. When the image production is completed, click the **Done** button to close the **Produce** dialog box.

After completing the image production, it is best practice to export the production numbers and other necessary field data from Concordance to a delimited text file. This information may be needed later for opposing counsel or an internal production review. For more information about exporting Concordance field data to a delimited text file, see [Exporting delimited text files](#).

Related Topics

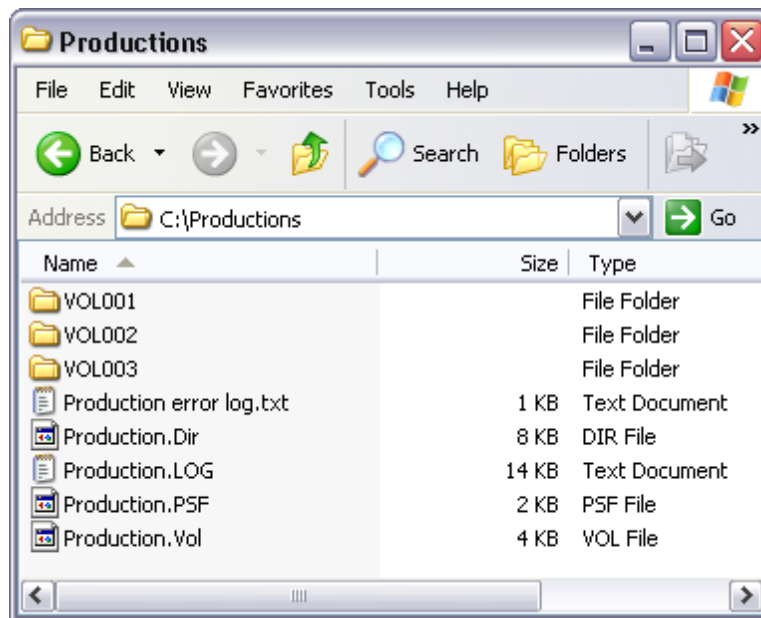
- Creating a production
- Locating documents to produce
- Annotating documents for production
- Capturing tag activity in Concordance
- Verifying produced images
- Creating a production database

Verifying produced files

After running a production, it is best practice to verify the produced images and the production data in Concordance.

To verify produced images and production data in Concordance:

1. In Windows Explorer, navigate to where you created the directory folder to store the production files.



2. Review the produced images and corresponding files.
3. If the image load file is being produced to opposing counsel, you will want to modify the directory path information before handing it over.
4. In Concordance, return to your document set and navigate to the next record to refresh the database.
5. Scroll to the bottom of the produced records to view the production numbers for the records and the tags applied to each record at the time of the production.

PRODTAGS1	:	PROD1
		Status>>Responsive
		Witness Kits>>Darling
		Witness Kits>>Goniff
PRODBEG1	=	DAR000008
PRODEND1	=	DAR000009

Related Topics

Creating a production
 Locating documents to produce
 Annotating documents for production
 Capturing tag activity in Concordance
 Producing images
 Creating a production database

Running a native file production

A native file production produces copies of the original native files to a specified production destination. The native file production does not include any markups or other production settings, Concordance simply copies the existing native files and renames them according to the parameters you specify.

Concordance renames the files using one of the following options:

- **Native File Name** - copies the name of the original native file name
- **Image Key** - names the files based on the corresponding image key
- **Field** - names the files based on the contents of a selected field
- **Custom** - names the files using a specified prefix and starting number

A native file production can be executed for all the documents in the database, for a specific set of documents from a query, or documents that have been tagged with a specific tag.

✍ The Native File Production operation cannot be used with a Concordance Image imagebase files. If you need to produce the files, convert the Concordance Image imagebase to a Concordance Native Viewer compatible imagebase (creating a CIB file) before using the Native File Production tools. For information on converting the imagebase, see [Converting Existing CI Imagebases](#).

✍ Make sure that the original native file name does not contain any Unicode characters as this may result in the production of a blank text file.

To run a native production:

1. In Concordance, open the database containing the documents you want to produce.
2. Do any of the following:



- To produce all the documents in the database, click the **All**  button to make sure that all the documents are available.
 - To produce a specific set of documents, run a search query to locate the documents you want to produce.
3. On the Tools menu, click **Production > Native File Production**.
 4. In the Native File Production dialog box, click the **Browse** button, and then navigate to the folder location where you want to store the produced files.
 5. Do any of the following:
 - To create a new folder, click the **Make New Folder**, in the Folder field type the folder name, and then click **OK**.
 - To use an existing folder, select the folder, and then click **OK**.

 The production folder must be empty.

 Keep in mind that Microsoft Windows limits file path names to a maximum of 260 characters. Therefore, the folder path, including the folder and production file name, should not exceed the 260 character limit as this may cause the application to close unexpectedly.

6. In the **Production Type** section, do one of the following:

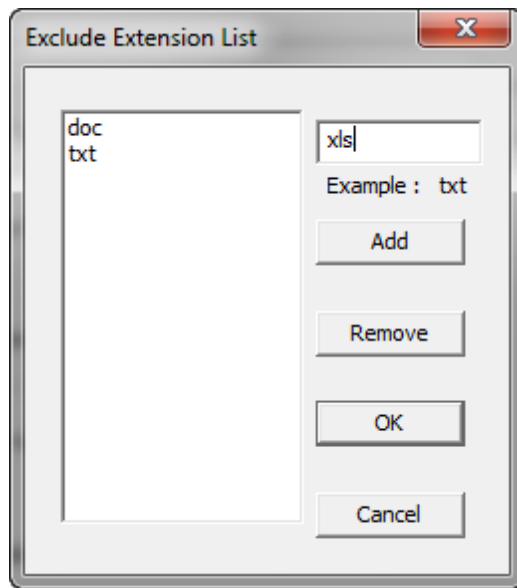
- To rename the produced files using the current native file, select **Native File Name**.
- To rename the produced files using the current Image Key and auto-increment the file names, click **Image Key**.
- To rename the produced files using the contents of a selected field, click **Field** and then select the field from the list.
- To rename the produced files using a specific name prefix and numbering, click **Custom**, in the first field type the prefix you want to precede the production number, and then in the second field type the number to use as the starting number for the production files.

 A maximum number of digits allowed for the starting number field is nine. The produced native files are automatically incremented from the starting number.

 Keep in mind that Microsoft Windows limits file path names to a maximum of 260 characters. Therefore, the folder path, including the folder and production file name, should not exceed the 260 character limit as this may cause the application to close unexpectedly.

7. (Optional) To exclude specific file types from the production and insert a placeholder page, click the **Exclusion List** button, do any of the following:

- To add a file, in the small field type the file type extension, and then click **Add**.
- To remove a file type from the exclusion list, click the file type, and then click **Remove**.



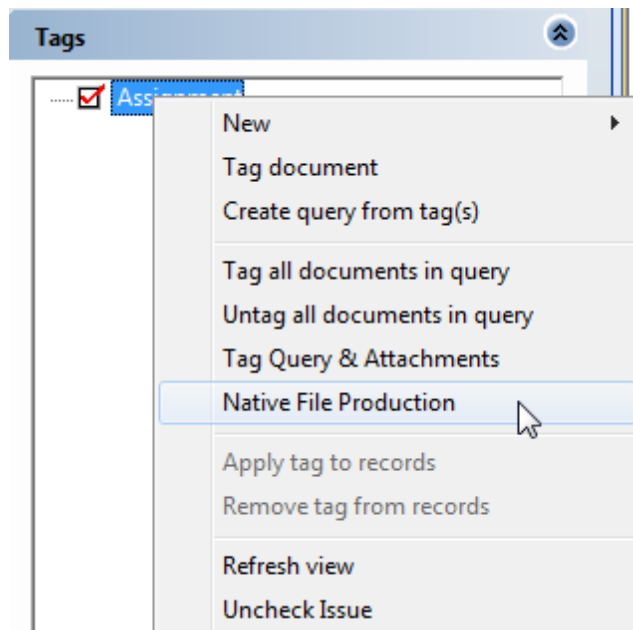
8. When finished, click **OK**.
9. To run the production, click **Start**.

 To run a native production for tagged documents:

1. In Concordance, open the database containing the documents to produce.
2. Create a tag specific to this production, such as PROD1, and apply the tag to the applicable documents.

For more information about creating and applying tags, see Creating and applying tags.

3. In the **Tags** task pane, right-click the tag, and then click **Native File Production**.



4. In the **Native File Production** dialog box, for the folder path, click the Browse button, navigate to the folder location, and then do one of the following:

- To create a new folder, click the Make New Folder, in the Folder field type the folder name, and then click OK.
- To select an existing folder, select the folder, and then click OK.

The production folder must be empty.

The Folder path including the folder name should not exceed 260 characters as this may cause the application to close unexpectedly.

5. Navigate to the folder where you want to store the production files, and then click **OK**.

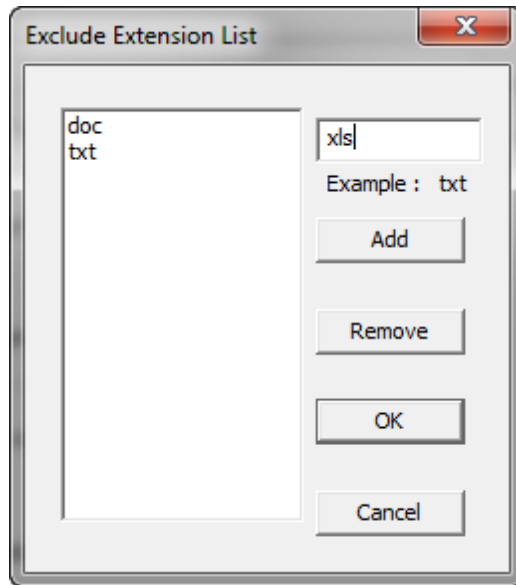
6. In the Production Type section, do one of the following:

- To use the current native file for naming the documents, select **Native File Name**.
- To use the current Image Key and auto-increment the file names, click **Image Key**.
- To use a field name and auto-increment the production file names, click **Field** and then select the field from the list.
- To rename the produced files using a specific name prefix and numbering, click **Custom**, in the first field type the prefix you want to precede the production number, and then in the second field type the number to use as the starting number for the production files.

A maximum number of digits allowed for the starting number field is nine. The produced native files are automatically incremented from the starting number.

7. (Optional) To exclude specific file types from the production, click the **Exclusion List** button, do any of the following and then click **OK**:

- To add a file, in the small field type the file type extension, and then click **Add**.
- To remove a file type from the exclusion list, click the file type, and then click **Remove**.



8. When finished, click **Start**.

Creating a production database

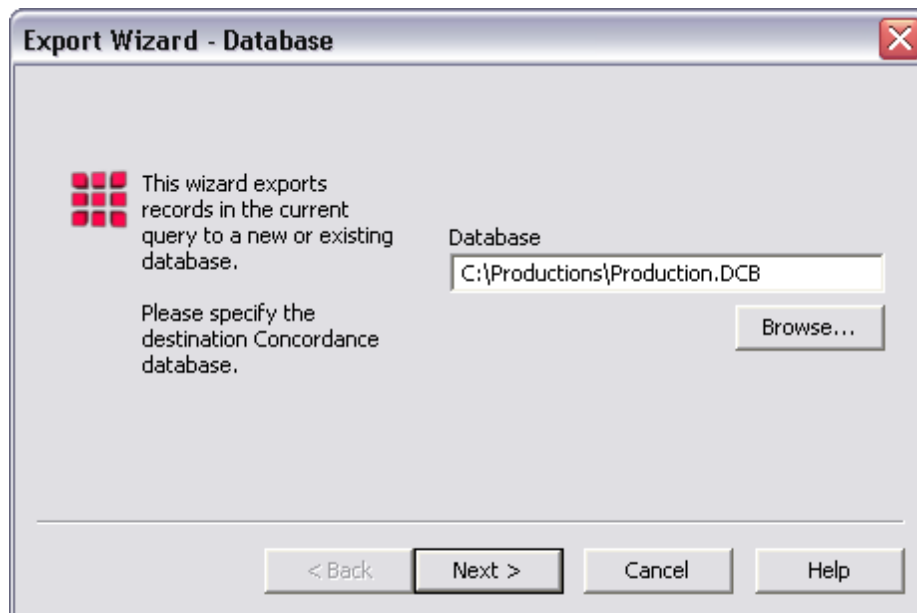
After running a production and verifying the produced images, it is best practice to create a database for the production.

For more information about exporting databases, see Exporting databases.

To create a production database:

1. In Concordance, make sure that the same production query is still active in the database or rerun the same production query in the database.
2. On the **Documents** menu, point to **Export**, and click **As a Concordance database**.

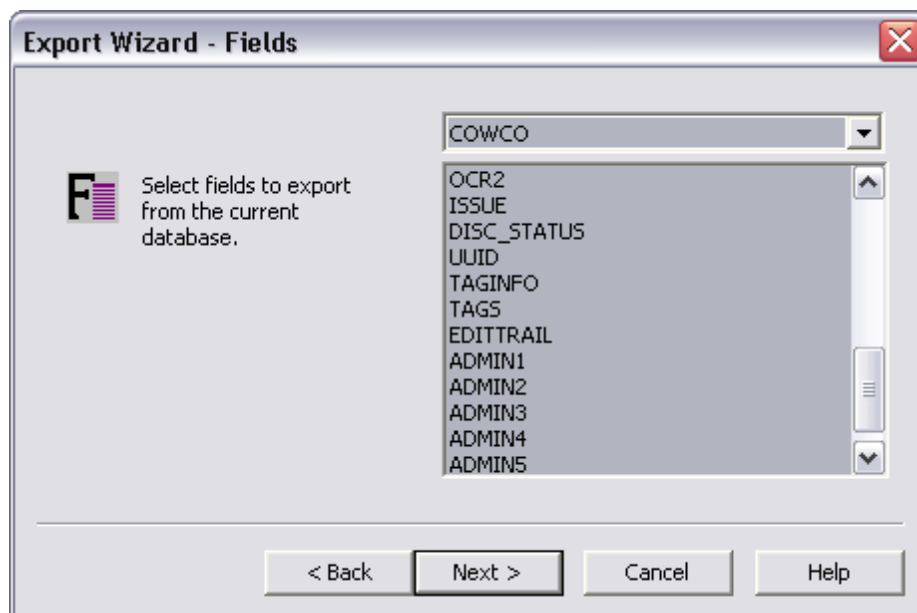
Clicking As a Concordance database opens the Export Wizard - Database dialog box.



3. Click the **Browse** button to open the **Select database to merge** dialog box.
4. Navigate to the directory where the production imagebase is stored, type the database name, using the same name as the production imagebase, in the **File name** field, and click **Open**.

When creating your production database, the database needs to be created in the same directory with the same name as the imagebase that was created in the production wizard. This will ensure that the production imagebase will link to the corresponding database.

5. Click **Next** to open the **Export Wizard - Fields** dialog box.



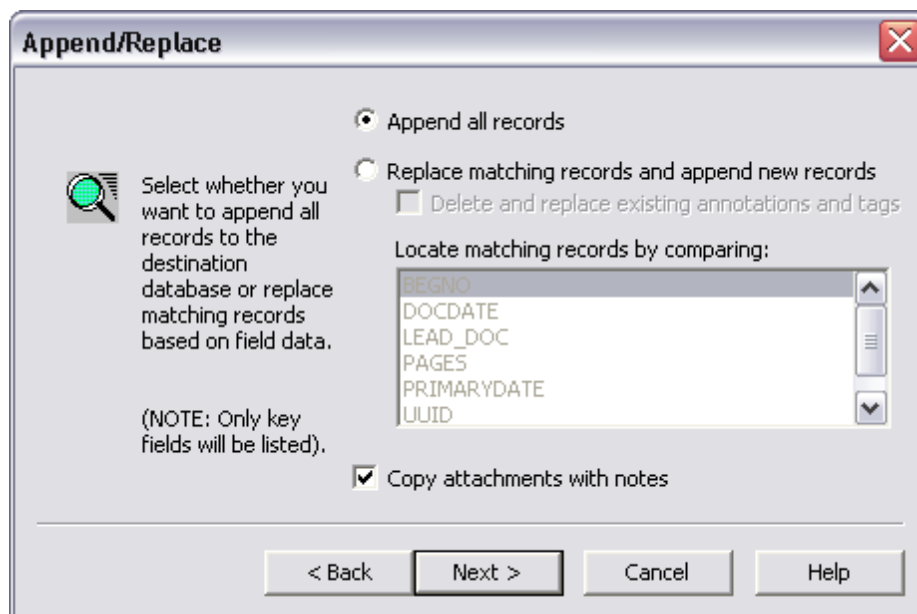
The database list defaults to the database currently opened, and all the database's fields are selected in the field list.

- ✎ When exporting to an existing database, fields are only exported if the fields match the fields in the existing database.

6. To only include some of the database fields in the export, in the fields list, click the fields you want to export.

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

7. Click **Next** to open the **Append/Replace** dialog box.



The Append/Replace dialog box allows you to control how documents are exported.

8. Select the **Append all records** option.

When you are exporting to a new database, if the Append all records option is selected, the export adds all records in the query to the database. If you are exporting to an existing database, the export appends all records in the query after the last record in the existing database.

9. To copy a record's attachments with notes during the export, select the **Copy attachments with notes** check box.

When the Copy attachments with notes check box is selected, the export automatically creates sequentially numbered attachment folders in the same directory as the Concordance database, and copies attachments into the subfolders. Folders are named in the format ATTACH-000000 and increment by one if the initial folder exceeds maximum capacity.

To exclude a record's attachments with notes from the export, clear the Copy attachments with notes check box.

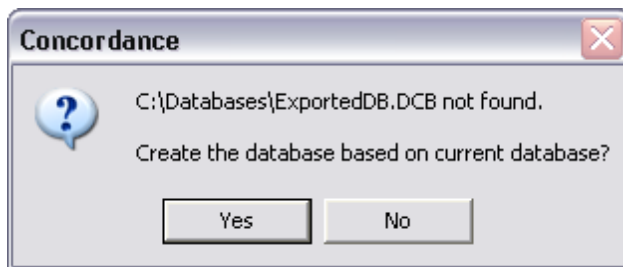
10. Click **Next** to open the **Export Wizard - Export** dialog box.

The dialog box is titled "Export Wizard - Export" and has a close button (X) in the top right corner. On the left, there is a green arrow icon and text: "Enter the range of documents to be exported from the current Concordance database. Click on the Export button to begin exporting the database." On the right, there are two text boxes: "Export database (destination):" with the value "C:\Databases\ExportedDB.DCB" and "Current database (source):" with the value "C:\DATABASES\COWCO". Below these are two spin boxes: "First" with the value "1" and "Last" with the value "203". At the bottom right, there is a label "Documents exported" with the value "0" and an empty text box below it. At the bottom, there are four buttons: "< Back", "Export", "Cancel", and "Help".

The First and Last fields default to the first and last record in the current query.

11. To modify the range of the records to be exported, in the **First** field, type the record number for the first record in the range you want to export, and in the **Last** field, type the record number for the last record in the range you want to export.
12. Click the **Export** button.

If you are exporting to a new database clicking the Export button opens the following message:

The dialog box is titled "Concordance" and has a close button (X) in the top right corner. On the left, there is a question mark icon. The text in the center reads: "C:\Databases\ExportedDB.DCB not found. Create the database based on current database?". At the bottom, there are two buttons: "Yes" and "No".

13. Click **Yes** to start the export and have the export create the new database.

If you are exporting to an existing database, clicking the Export button starts the export.

You can click the Cancel button at any time to cancel the process.

When the export finishes, the Export Wizard - Export dialog box automatically closes.

14. On the **File** menu, click **Open** to open the **Open** dialog box.
15. Navigate to and open the production database you created, to open the database in Concordance.

16. On the **File** menu, click **Modify**.

Clicking Modify opens the Modify dialog box.

17. In the **Modify** dialog box, change the database's image alias.

To change the database's image alias, click the current database image field name in the field list and clear the Image check box (often the BEGNO field or its equivalent is used as the image key field), and then click the field you created to store your production numbers, such as PRODBEG1, and select the Image check box.

By identifying the new production numbers as the image alias, Concordance and Concordance Image will be able to synchronize the produced images with their corresponding records in the database.

Field Name	Type	Length
PAGES	Numeric	20.0
ATTYNOTES	Paragraph	
REVIEWSTATUS	Paragraph	
OCR1	Paragraph	
OCR2	Paragraph	
ISSUE	Paragraph	
DISC_STATUS	Paragraph	
REPLICATION	Paragraph	
UUID	Numeric	10.0
TAGINFO	Paragraph	
TAGS	Paragraph	
EDITTRAIL	Paragraph	
ADMIN1	Paragraph	
ADMIN2	Paragraph	
ADMIN3	Paragraph	
ADMIN4	Paragraph	
ADMIN5	Paragraph	
PRODTAGS1	Paragraph	
PRODBEG1	Text	30
PRODEND1	Text	30

Status
Documents: 7
Fields: 35

Punctuation: -/.,'@&

Name: PRODBEG1
Type: Text
Length: 30
Places:
Format:

☒ Image ☒ Key ☐ Accession
☐ System ☐ Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

18. Click **OK** to save your changes.
19. On the **File** menu, click **Index** to index the database.
20. Close Concordance and Concordance Image to refresh the image alias value for the database.
21. Reopen the production database in Concordance.
22. On the **Dynamic** toolbar, click the **View image** (camera) button to open Concordance Image and the produced images linked to the production database you created.

Related Topics

Creating a production
Locating documents to produce
Annotating documents for production
Capturing tag activity in Concordance
Producing images
Verifying produced images

Creating Reports

About creating reports

Concordance provides several tools for printing document records and transcripts, and can be used to create and print a variety of customized reports based on search results, field content, tagged document sets, and transcript annotations. Printing options are available within Concordance from either the Browse or Table view, and the output looks similar to the onscreen display, depending on which view you choose to print from. Document images can also be printed from Concordance Image, based on search results in Concordance.

While Concordance offers the basic options for printing, such as page numbers and dates, Concordance also offers selections for printing highlighted annotations, underlined hits, field labels, and more. This is especially useful for printing sets of records for full-text review or printing annotations from transcripts.

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

You can create reports in Concordance using the following methods:

- **Exporting Concordance Table Data**

You can export Concordance record content to CaseMap, a case tracking tool, or export record content to spreadsheets in Microsoft Excel.

For more information about exporting table data, see *Exporting Concordance data*.

- **Printing with the standard print options**

Concordance offers many standard printing options and report tools to assist reviewers during case review.

For more information about using the standard print options in Concordance and Concordance Image, see *Printing standard reports* and *Printing images in Concordance Image*.

- **Printing with the Annotation Report Writer Wizard**

Use the Annotation Report Writer Wizard to create custom reports from your transcript files. The custom reports can include transcript notes, highlights, and attachments.

For more information about creating custom reports using the Annotation Report Writer Wizard, see *Printing transcript annotations*.

- **Printing with the Report Writer**

Use the Report Writer to create custom reports from the Table view, based on a sort query.

You can also use the Report Writer in conjunction with a CPL (Concordance Programming Language) script to create custom exploded sort reports.

For more information about creating custom reports using the Report Writer, see Printing with Report Writer.

Exporting Concordance data

In Concordance, you can export record data from the Table view to Microsoft Excel, CaseMap, and Equivio. The export feature is a great tool for making custom reports, as well as contact and mailing lists. In order to export to Microsoft Excel, CaseMap or Equivio, the software you are exporting to must be installed on your computer.

- ✍ If you want to export data to Microsoft Word, you can simply copy and paste data from Concordance to Microsoft Word.

Exporting to Microsoft Excel

When you export data from the Table view to Microsoft Excel, Concordance exports data from the records you select in the Table view. The fields and field order currently displayed in the Table view determine which field data is exported for the selected records and the order of the fields exported to Microsoft Excel. Before exporting, you can run a search to display the records you want to export in the Table view, and modify the table layout to define the fields and field order you want to include in the export.

- ✍ Microsoft Excel has capacity limitations. If you are primarily exporting your data to Microsoft Excel 2003, you need to be aware that this version of Excel is limited to printing a maximum of 65,000 rows, and also has limitations for the number of characters per cell.

To export table data to Microsoft Excel:

1. Run a search to locate the records you want to include in the export to Microsoft Excel.

For more information about searching, see Available search tools.

2. In the **Table** view, adjust your table layout to include the fields and field order you want to export to Microsoft Excel.

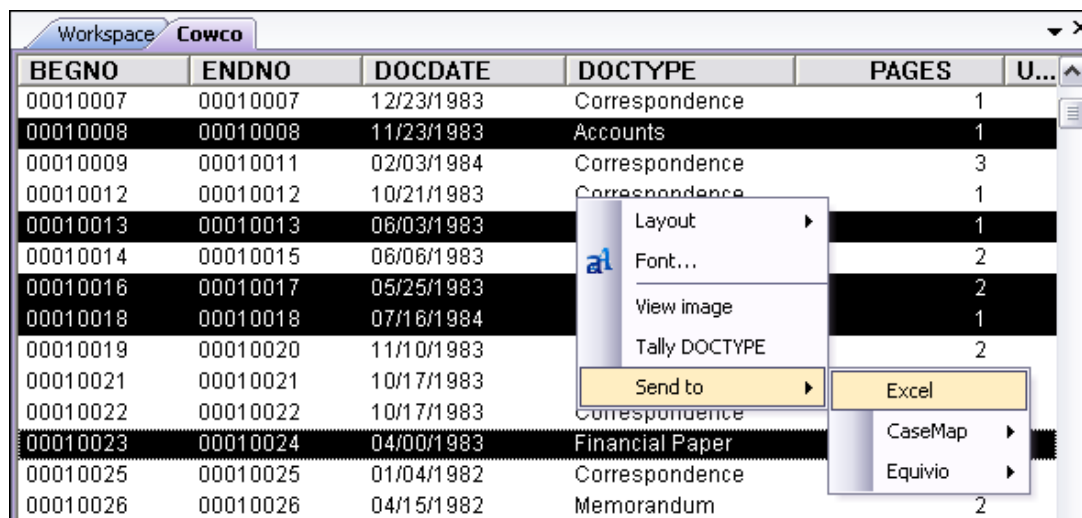
For more information about adjusting a table layout, see Using table layouts.

3. In the **Table** view, select the records you want to export.

You can export multiple adjacent records and non-adjacent records.

- Adjacent records: SHIFT + Click to select a block of consecutive records.
- Non-adjacent records: CTRL + Click to select random records from the list.

- All records: CTRL + A to select all records in the list.



4. Right-click in the **Table View**, point to **Send To**, and then click **Excel**.

Microsoft Excel automatically launches and displays your exported Concordance data in the field order you selected.

	A	B	C	D	E
1	BEGNO	ENDNO	DOCDATE	DOCTYPE	PAGES
2	10008	10008	11/23/1983	Accounts	1
3	10013	10013	6/3/1983	Correspondence	1
4	10016	10017	5/25/1983	Correspondence	2
5	10018	10018	7/16/1984	Correspondence	1
6	10023	10024	04/00/1983	Financial Paper	2

Exporting to CaseMap

When you export table data to CaseMap from the Table view, all of the records listed in the Table view are exported to CaseMap. Before exporting data to CaseMap, run a search to capture only the records you want to include in the export.

To export table data to CaseMap:

1. In Concordance, 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 data to CaseMap and using CaseMap's Bulk Send to CaseMap wizard, see the CaseMap documentation.

Exporting Numerical Data

When you export numerical data from Concordance to Microsoft Excel, if the field value begins with leading zeros, the leading zeros are trimmed from the field value. For example, if you are exporting the BEGNO field value *00020177*, the value is exported to Excel as *20177*. To keep record numbering consistent with Concordance data, you need to add the leading zeros back onto the applicable field data in Microsoft Excel. See, Microsoft Excel documentation.

 Numerical field values starting with alphabetical prefixes are not affected when exporting to Microsoft Excel.

Only the field data that is displayed in the Table view is exported. Field data is exported in the order that is displayed in the Table view, based on the selected table layout. You can use custom table layouts to determine the field data and order of field data exported to another application.

Exporting to Equivio

Equivio is an optional companion product for Concordance version 10.19 or earlier E-mail databases. In Concordance, Equivio highlights the textual differences between two e-mail documents.

The Equivio commands on the File menu and shortcut menu in the Table view are used to compare two e-mail messages selected in the Table view.

Before you can compare e-mail messages in the Table view, the e-mail messages have to be exported to Equivio for processing, and have had their Equivio results updated by the Equivio import.

For more information about exporting data to Equivio and comparing e-mail messages in the Table view, see *Using Equivio with Concordance*.

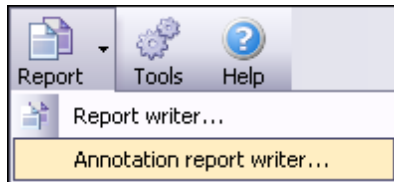
Printing transcript annotations

Because your transcripts are unique documents with added notes, highlights and attachments, Concordance 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:

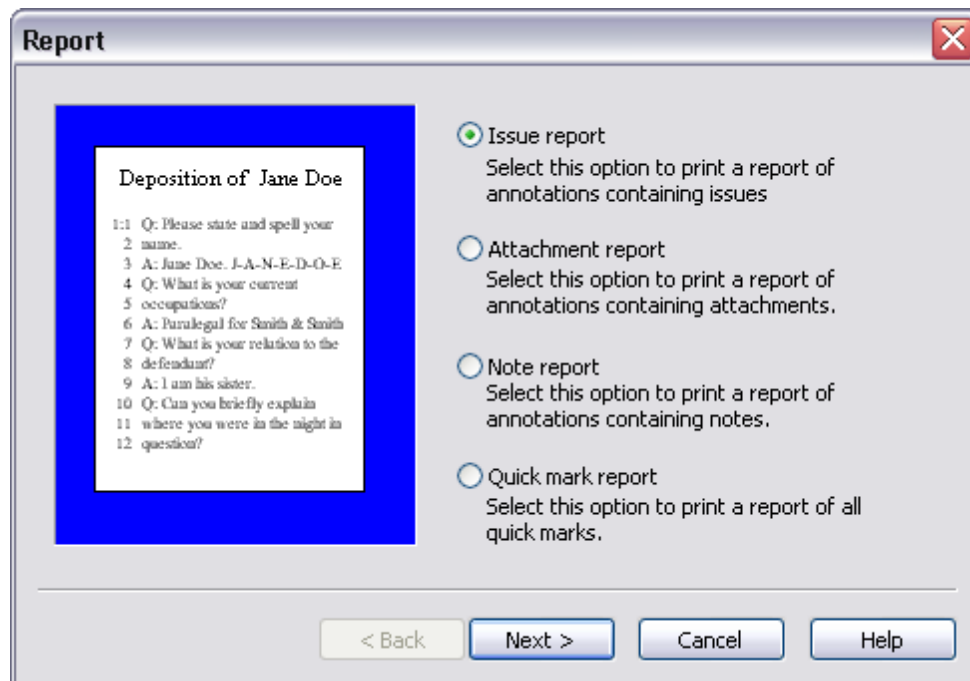
1. In Concordance, open your transcripts database.
2. On the **Standard** toolbar, click the arrow next to the **Report** button and select **Annotation report writer**.



3. In the **Annotation Report** dialog box, select **Annotation Report Wizard** and click **OK**.



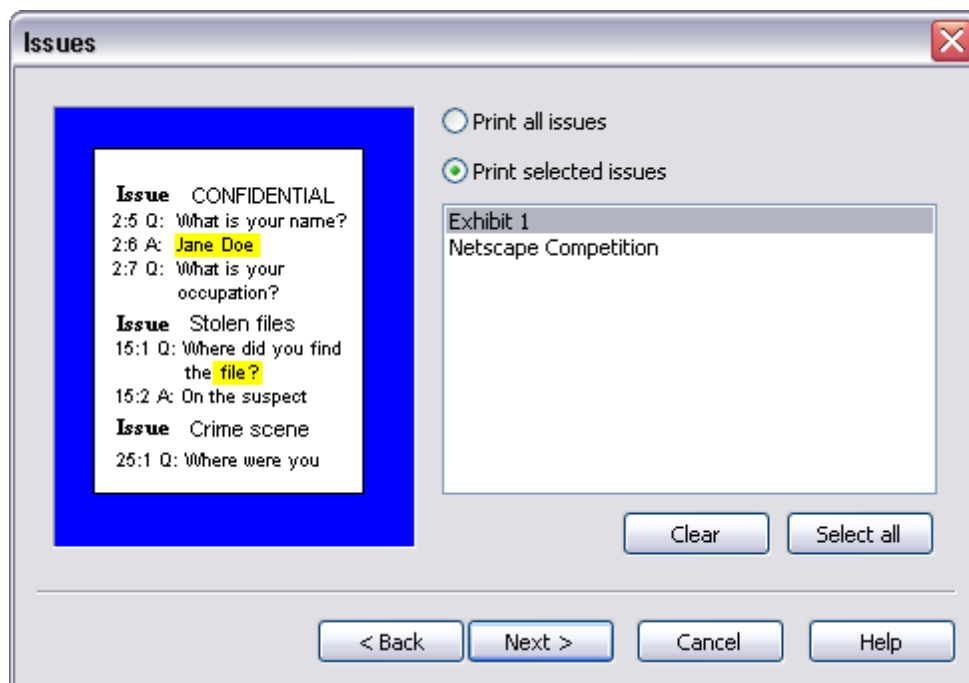
4. In the **Report** dialog box, select the type of annotated report you want to print and click **Next**.
 - **Issue report** - prints an issues report
 - **Attachment report** - prints a report of annotations containing attachments
 - **Note report** - prints a report of annotations containing notes
 - **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.

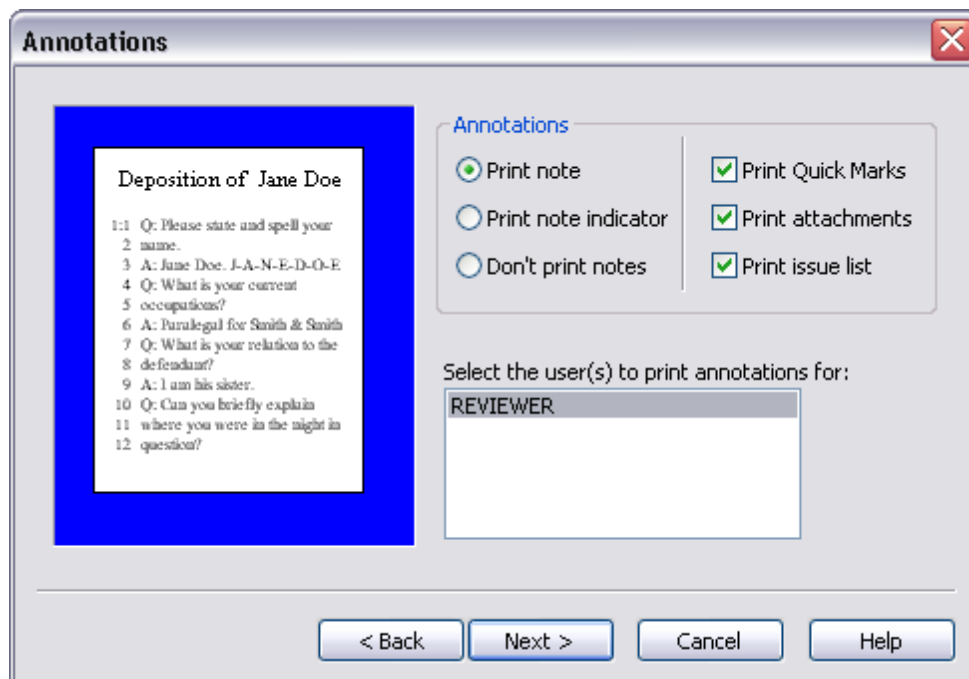
To select individual issues in the list, use CTRL+click. To select a block of issues in the list, use SHIFT+click.

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

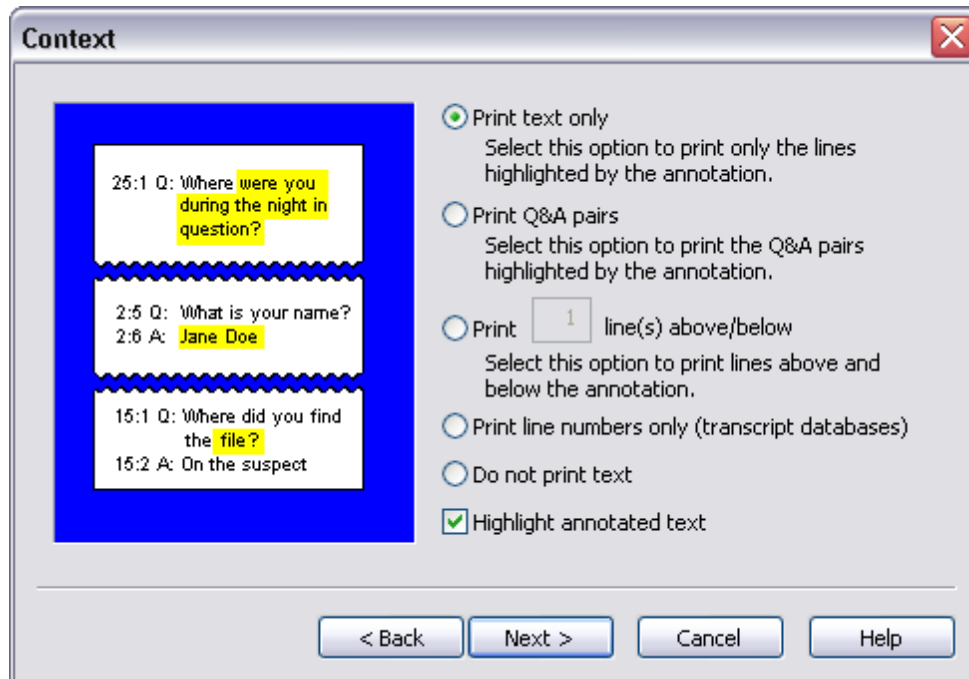


6. In the **Annotations** field, select the one of the note printing options and select whether you want to print the quick marks, attachments, and/or issue list.
7. In the **Select the user(s) to print annotations** field, select the users for which you want to print annotations and click **Next**.

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

Header
Report Title

Footer
Printed for Reviewer

Annotation header (prints at top of annotation)
Transcripts - <Name, Date, Volume>

☒ Print page numbers

☒ Print date

☒ Print time

Compressed print
1-up printing

☐ Print page border

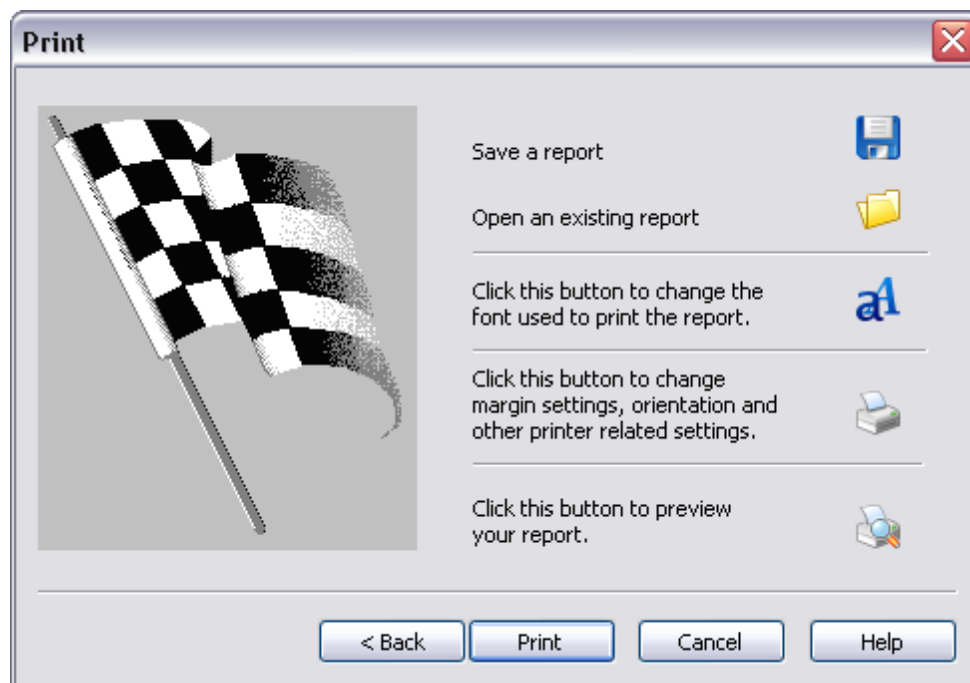
< Back Next > Cancel Help

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 with the Report Writer

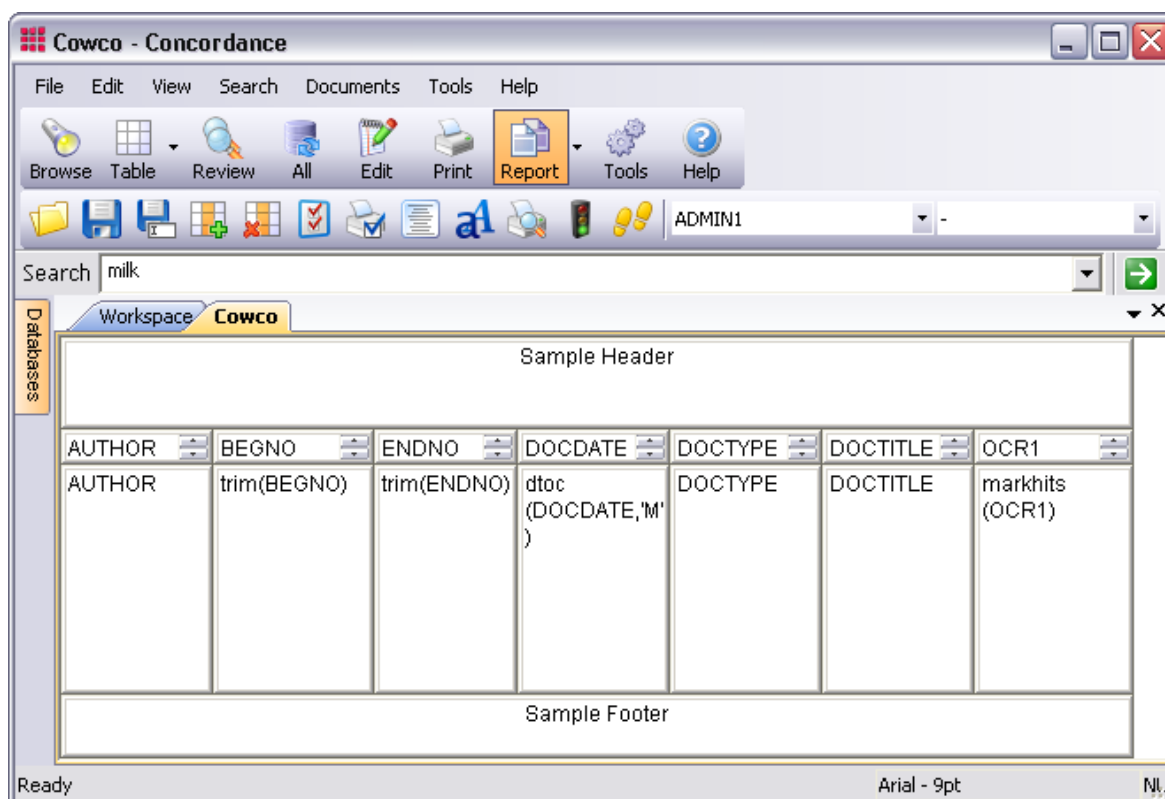
With the Report Writer, you can create simple reports, exploded sort reports, complex reports from concatenated databases, or reports where you need to print tens of thousands of records. The reports are based on a sort query.

You can select the fields to use, column widths, and page and individual column formats and alignment. The report columns can contain stacked fields, truncated fields, calculated data, and combined data and quoted text with tab alignment. The Report Writer supports date and math calculations, and advanced if-then-else logic. While many of these features are powerful, the report writer was designed to be easy and flexible.

In Concordance, the Report Writer is only available in the Table view, but you can also use the Report Writer in conjunction with CPL (Concordance Programming Language) scripts.

- ✍ If you are primarily exporting your data to Microsoft Excel 2003, you need to be aware that this version has limitations for a maximum number of rows and characters per cell.

Understanding the Report Writer



Editable Areas

The Report Writer screen is divided into four horizontal edit areas:

- **Page Header**

The top edit box is the page header. It is printed at the top of every page. Any text can be typed into the page header. The header can be pulled down to give you more room for a large header or font. There is no limit to the number of lines in the header. If you do not want a page header, just pull it up until it disappears.

- **Column Headers**

The next row of the report contains the column headers. These are printed at the top of every page, above the data columns. As with the page header, the column headers are resized by grabbing the window borders and pulling them up or down. There is no limitation on the number of lines of text they can hold. Make them as large or small as you need. Resizing one column header will resize all column headers, they are always uniform in height.

- **Data Columns**

The next row contains the data columns. These contain the actual data printed in your reports. The data columns are interpreted; if you place a field's name--it must be in upper case--in the column, then that field's data ends up in the report. If you place something like, "Data: " + SUMMARY into the column, then the word "Data: " precedes the text from the field named SUMMARY. Any text or function or mathematic operator defined in the programming language can be used in a data column. This allows you

to do things like convert data to upper or lower case, print only the first 100 characters, or calculate dates and other values in your reports.

- **Page Footer**

The bottom edit box is the page footer. The page footer is printed at the bottom of every page. Any text can be typed into the footer. The footer can be pulled up or down to give you more or less room for text or type size. Make the footer's window smaller if too much room appears between the footer and the page numbers or dates.

Adding Field Titles and Data

There are two drop-down lists on the Report Writer toolbar. The first list contains a list of every field in the database. The second list contains a list of useful CPL functions and operators. When adding fields to a report, you should always select fields from the list box. It will automatically include necessary conversions for you, such as converting dates to text so that they can be printed. For instance, selecting the date field DATE will actually place dtoc(DATE) into the report column. This uses the date-to-character function to convert a numeric date into text. To add a field, function, or operator to a report, click on the report where you want to add a field, function, or operator and make a selection from the field or function list.

If you need to type field names manually, make sure that you use upper case letters. The report writer will not recognize field names unless they are in upper case.

Stacked Fields and Other Useful Tricks

The Report Writer is very powerful and flexible. It can use any of the CPL (Concordance Programming Language) Operators and Functions. With the Report Writer, you can create some wonderful and complex reports. There are however, just a handful of functions and operators, like the plus sign, which you will use most of the time. This section describes the most useful functions and how to use them.

The first thing you may want to do is to combine some text with a field or two. The following example does just that. It stacks two fields in one column with titles for data:

```
"Date "+dtoc(DATE)+newline()+
```

```
"Customer "+CUSTOMER
```

Enclose any static text in quotes. Combine quoted text and other data with the plus sign. The newline() function forces anything that follows it onto the next available line. Also included in the example, but not shown, are tabs. The quoted text includes a tab character to align the two data fields--there are no spaces in the line.

Always remember to use plus signs to combine everything with everything else. Leaving one out, or putting two plus signs in a row, are the two most common report errors.

Sometimes you may have a very large field which would use a lot of paper if it were printed. The next example uses the substr() function to print the first 200 characters of

the summary field, it *sub-strings* it.

```
substr(DIGEST,1,200)
```

The example above uses the substr() function to grab 200 characters, starting with the first character. For this scenario, it would be really useful if we could check first to see if the brief field was actually more than 200 characters long. Then we could append ellipses (...) to show that we truncated the entry, if we need to truncate it at all.

```
(len(DIGEST)>200?substr(DIGEST,1,200)+"...": DIGEST)
```

This example uses two new features: the len() function and the conditional operator. The len() function determines the length of the text in any field. The conditional operator allows us to embed if-then-else logic into a report column. The conditional operator has the following format: *(statement?true-response:false-response)*. The Report Writer tests the statement. If it is true, the true-response is the result, otherwise the false-response is the result. In our example the Report Writer determines if the length of the digest field is greater than 200 characters. If it is, the true-response returns the first 200 characters of the field with ellipses appended to show that it was truncated. If the statement is false, the entire field is printed. The parentheses around the conditional operator are required.

Report Writer Guidelines

- Use *if-then-else* syntax is (:?) and put *literal text* within quotes

If a date = 00/00/0000, then you can place quotes around "no date available"

- Stack fields with newline()

"Beg Bates : "+BEGNO+newline()+"End Bates : "+ENDNO

Report Writer Toolbar

Once you have generated a report using the Report Writer, the report and the Report Writer toolbar are displayed in Concordance. You can use the Report Writer toolbar to open, save, and insert files, select print options and font settings, and more. You can also select fields and codes to customize your report options.



Button Definitions

Report Writer Toolbar Buttons

Button	Name	Description
	Open	Opens the Open dialog box. Click the Open button to open an existing .arp report file in the Report Writer.

Report Writer Toolbar Buttons		
Button	Name	Description
	Save	Saves your latest report changes to the .arp file currently opened.
	Save as	Opens the Save As dialog box.
	Insert	Inserts a column to the left of a selected column. Click a column in the report and click the Insert button to open the Report Columns dialog box. Type the number of columns to insert and click OK to insert the new columns.
	Delete	Deletes a selected column. Click a column in the report and click the Delete button to open the Report Columns dialog box. Type the number of columns to delete and click OK to delete the selected column, and if you entered more than one column, the remaining number of columns you entered to the right of the selected column.
	Options	Opens the Report Options dialog box. In the Report Options dialog box, you can edit the report's current settings.
	Page Setup	Opens the Page Setup dialog box. In the Page Setup dialog box, you can edit the report's page setup settings, including the paper size, source, orientation, the page margins, and printer.
	Justify	Opens the Justify dialog box. Select the check box that applies to the text you want to format, click OK to open the Text Alignment dialog box, click the alignment option you want to use, and click OK.
	Font	Opens the Font dialog box. Select the check box that applies to the text you want to format, click OK, modify the font, and click OK again.
	Print Preview	Opens the report in the print preview screen. The print preview screen allows you to browse through up to 100 pages of your report before printing the report.
	Print	Opens the Print dialog box. Select your printer settings and click OK to print the report.
	Exit	Closes the Report Writer in Concordance. You will be prompted to save the report if any changes were made.
	Field List	Contains a list of the database fields you can add to the report.
	Function List	Contains a list of available CPL functions and operators you can add to the report.

You can create reports in the Report Writer using the wizard or manually create reports in the Report Writer's Report Options dialog box. You can also edit existing reports in the Report Options dialog box.

 To generate reports using the Report Writer Wizard:

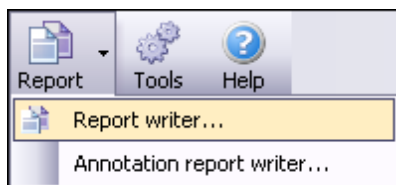
1. Run a search query to locate the documents you want to include in the report.

For more information about searching, see Available search tools.

2. In the **Table** view, use a table layout to organize the columns and column order you want to include in the report.

For more information about custom layouts see, Using table layouts.

3. With the **Table** view still open, on the **Standard** toolbar, click the down arrow next to the **Report** button and click **Report writer**.



Clicking Report writer opens the Report Writer dialog box.



4. Select the **Report Writer Wizard** option and click **OK**.

Clicking OK opens the Report Wizard - Documents dialog box.

5. In the **Report Wizard - Documents** dialog box, define the report's document range settings.

 To define the settings in the Report Wizard - Documents dialog box:

Report Wizard - Documents

Document 3 of 3
Document 2 of 3
Document 1 of 3

Name: John Smith
Date: 01/01/1996
Summary: Smith and Associates

Specify the document range you wish to print.

Total: 47

First: 1

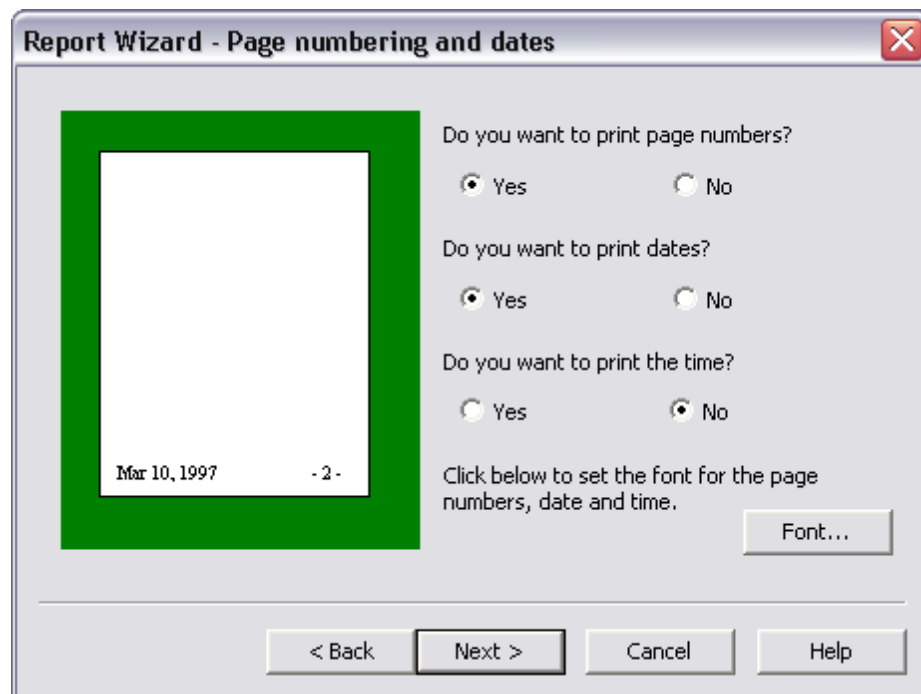
Last: 47

< Back Next > Cancel Help

In the Report Wizard - Documents dialog box, the First and Last fields default to the first and last record in the current Concordance query.

1. To modify the range of the records to be printed, in the **First** field, type the record number for the first record in the range you want to print, and in the **Last** field, type the record number for the last record in the range you want to print.
2. Click **Next** to open the **Report Wizard - Page numbering and dates** dialog box.
6. In the **Report Wizard - Page numbering and dates** dialog box, define the report's page numbering and date stamp settings.

☐ To define the settings in the Report Wizard - Page numbering and dates dialog box:



In the Report Wizard - Page numbering and dates dialog box, the page number, date, and time stamp options all default to No. If you choose to print page numbers and/or date and time stamps, they will be printed at the bottom of each page in the report footer.

1. To print page numbers, in the **Do you want to print page numbers** field, select the **Yes** option.

Page numbers are printed in the lower-right corner of the report.

2. To print the current date, in the **Do you want to print dates** field, select the **Yes** option.

The date is printed in the lower-left corner of the report.

3. To print the current time, in the **Do you want to print the time** field, select the **Yes** option.

The time is printed in the lower-left corner of the report.

The default font for page numbers and date and time stamps is Arial 9pt. The report uses the same font settings for page numbers and date and time stamps on the report.

4. To modify the font settings, click the **Font** button.

Clicking the **Font** button opens the **Font** dialog box.

5. Specify the font settings and click **OK** to save your changes.

The font changes apply to all the page numbers and date and time stamps on the

report.

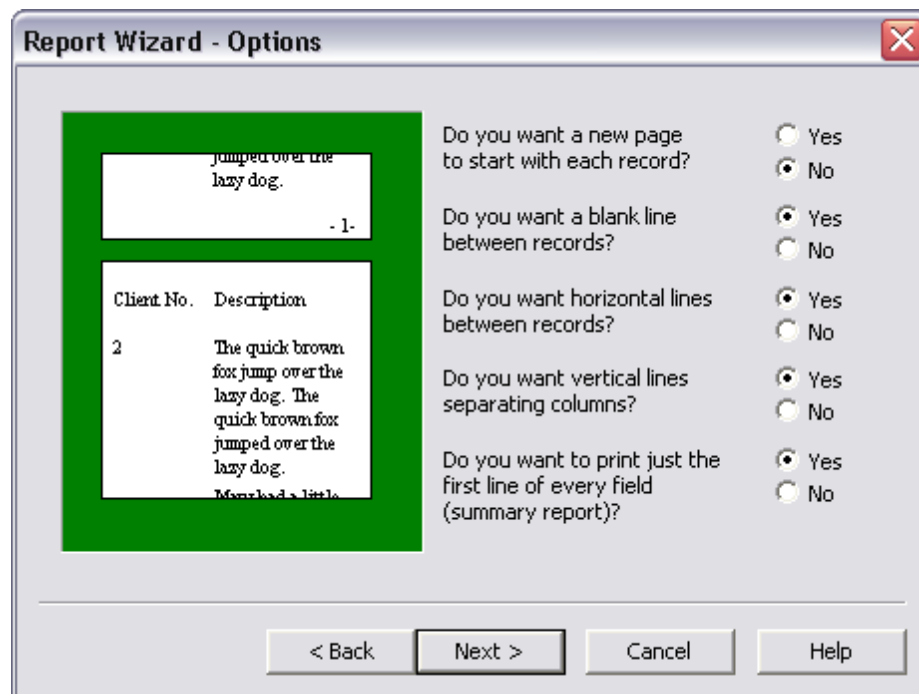
6. Click **Next** to open the **Report Wizard - Header/Footer** dialog box.
7. In the **Report Wizard - Header/Footer** dialog box, define the report header and footer settings .

☐ To define the settings in the Report Wizard - Header/Footer dialog box:

In the Report Wizard - Header/Footer dialog box, you can preset the header and footer text for all of the fields default to No, except for the Do you want a blank line between records field.

1. To print a report header, in the **Enter the report header** field, type the header text you want to print.
 2. To print a report footer, in the **Enter the report footer** field, type the footer text you want to print.
 3. Click **Next** to open the **Report Wizard - Options** dialog box.
8. In the **Report Wizard - Options** dialog box, define the report's record break, column border, and field printing settings.

☐ To define the settings in the Report Wizard - Options dialog box:



In the Report Wizard - Options dialog box, all of the fields default to No, except for the Do you want a blank line between records field.

1. To print each record on a separate page, in the **Do you want a new page to start with each record** field, select the **Yes** option.
2. To disallow a blank line between each record on the report, in the **Do you want a blank line between records** field, select the **No** option.
3. To add a horizontal line between each record on the report, in the **Do you want horizontal lines between records** field, select the **Yes** option.

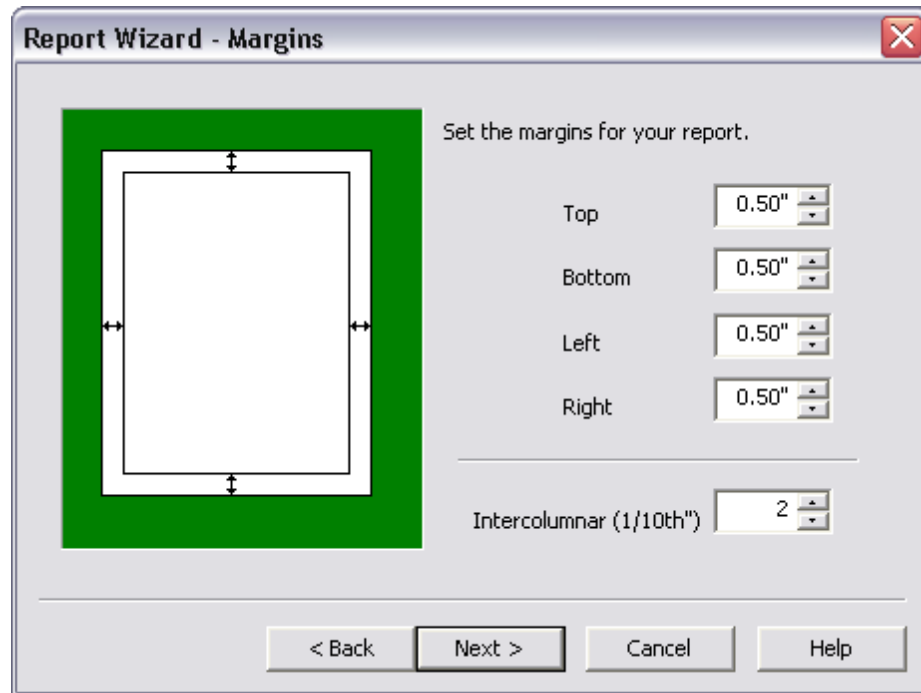
The Do you want horizontal lines between records field is only available if you are also adding blank lines between each record.

4. To add vertical lines between each report column, in the **Do you want vertical lines separating columns** field, select the **Yes** option.
5. To print only the first line from each field in the report, in the **Do you want to print just the first line of every field (summary report)** field, select the **Yes** option.

If you choose to only print the first line of each field, Concordance prints a summary report with one line per record.

6. Click **Next** to open the **Report Wizard - Margins** dialog box.
9. In the **Report Wizard - Margins** dialog box, define the report's page margins and intercolumnar spacing setting.

 **To define the settings in the Report Wizard - Margins dialog box:**



In the Report Wizard - Margins dialog box, all page margins default to .50 inches from the edge of the page, and the Intercolumnar (1/10th") field defaults to 2 tenths.

1. To edit the print margins, type or select the margin sizes in inches, that you want to print on the report.

Some printers have an *unprintable* reserved area and the margins cannot be set below this limit.

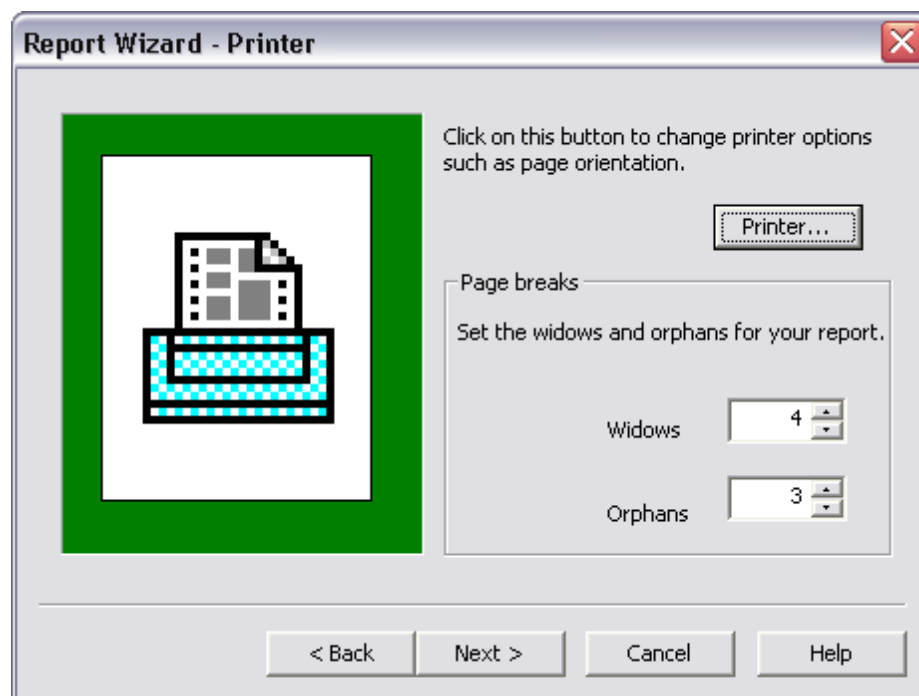
2. To edit the intercolumnar spacing, in the **Intercolumnar (1/10th")** field, type or select the spacing, in tenths of an inch, that you want to print on the report.

The intercolumnar spacing determines the distance between columns in your report.

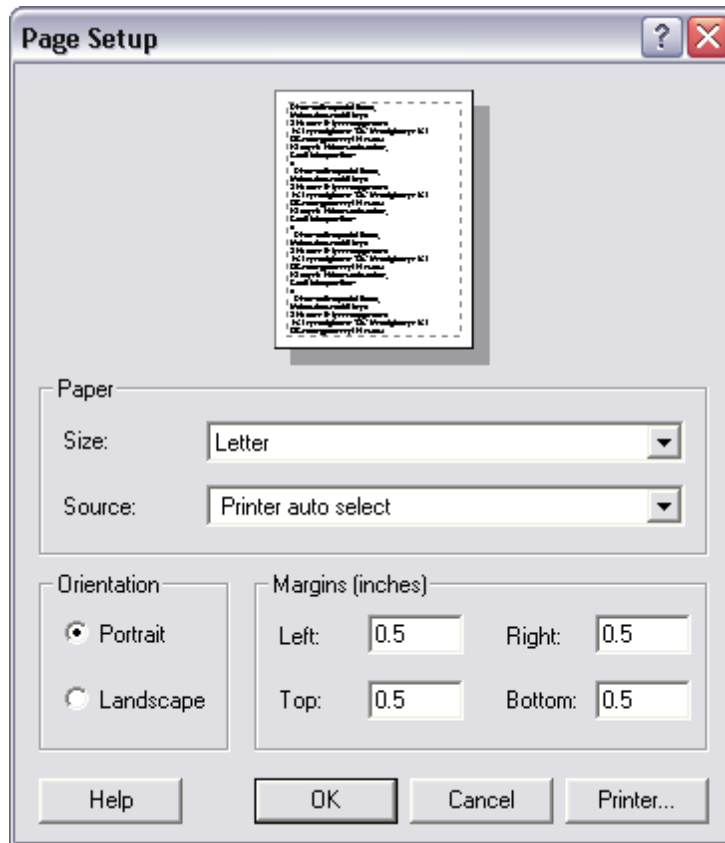
3. Click **Next** to open the **Report Wizard - Printer** dialog box.

10. In the **Report Wizard - Printer** dialog box, define additional report page settings including page breaks and orientation.

☐ To define the settings in the Report Wizard - Printer dialog box:



1. To change the paper size or source, page orientation or margins, or default printer, click the **Printer** button.
2. Clicking the **Printer** button opens the **Page Setup** dialog box.



3. Make the applicable edits.

To change the default printer for the report, click the Printer button, make the applicable edits, and click OK to save your changes.

4. In the **Page Setup** dialog box, click **OK** to save your changes and return to the **Report Wizard - Printer** dialog box.

In the Report Wizard - Printer dialog box, the Widows field controls the minimum number of lines Concordance will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the Widows field, then the document is moved to the top of the next page.

The Orphans field controls the minimum number of lines Concordance prints at the top of a page when splitting a document between pages. If the lines left to print are less than the value in the Orphans field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the Widows threshold, causing the entire column to print at the top of the next page.

The Widows field defaults to 4 lines and the Orphans field defaults to 3 lines.

5. To change the widows value, in the **Widows** field, type or select the number of lines you want the report to use for page widows.
6. To change the orphans value, in the **Orphans** field, type or select the number of

lines you want the report to use for page orphans.

7. Click **Next** to open the **Report Wizard - Exploded Sort** dialog box.

11. In the **Report Wizard - Exploded Sort** dialog box, define the report's exploded sort settings.

■ **To define the settings in the Report Wizard - Exploded Sort dialog box:**

Author	Title
Alma Union Bank	Report
Capital Experts	Memo
Capital Experts	Report
Capital Experts	Stock Report
Duck; D	Stock Report
Financials-R-Us	Stock Report
First Security Bank	Report
Gray; RE	Report
Hewitt; B	Memo
Koonz; H	Report
Looper; JA	Stock Report

Do you want an exploded report?

☒ Yes ☐ No

Select the field you want to explode sort.

AUTHOR

Set a delimiter to base the exploded sort.

,

< Back Next > Cancel Help

An exploded sort is a report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record. Concordance determines each sub-entry in a field by grabbing the data between delimiters such as a comma. Any punctuation character can be used as the delimiter as long as it is used consistently.

■ **Exploded Sort Example:**

An attorney has placed bibliographic entries for all of the documents needed in a case into Concordance. The counselor then searched for financial reports, and wanted to print a report showing each author alphabetically for an upcoming deposition. With a typical report, the attorney would get a printout sorted by the first author's name appearing in the author field. Finding a specific author's name would require looking through each multi-author entry in the report. Using an exploded sort places each author in alphabetical order in the first column, repeating the data in the other columns for each entry. Now the attorney can find the authors quickly and easily, during the deposition.

1. To create an exploded sort report, in the **Do you want an exploded report** field, select the **Yes** option.

If you do not want to create an exploded sort report, select the No option and click Next to open the Report Wizard - Fields dialog box.

2. In the **Select the field you want to explode sort** field, click the field you want to use for the exploded sort.

The field selected in the Select the field you want to explode sort field will always be the first column in your exploded sort report.

Records should be sorted by the field used in the report's second column before entering the Report Writer. That way duplicate records are sorted by the second column's contents.

The Set a delimiter to base the exploded sort field defaults to a comma.

3. To change the delimiter used for the exploded sort, in the **Set a delimiter to base the exploded sort** field, type the delimiter you want to use.
 4. Click **Next** to open the **Report Wizard - Fields** dialog box.
12. In the **Report Wizard - Fields** dialog box, define the fields that print in the report columns.

 To define the settings in the Report Wizard - Fields dialog box:



The order the fields are listed in the Column list is the order the fields will be displayed in the report columns. If you are creating an exploded sort report, the field you selected on the Report Wizard - Fields dialog box is automatically added to the first column in the report, and cannot be moved from the first column. The wizard automatically sets the number of columns in the report to the number of fields selected in the Report Wizard - Fields dialog box.

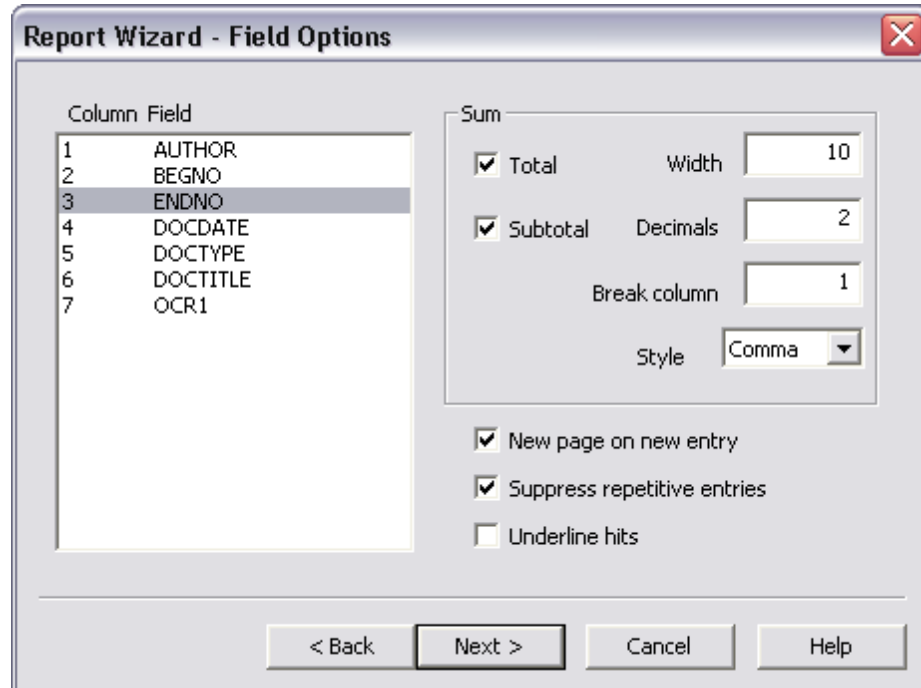
1. To add a field to the **Column** list, click the field in the **Field** list, and click the right arrow, **>**, button.
2. To remove a field from the **Column** list, click the field in the **Column** list, and click the left arrow, **<**, button.
3. To change the column order of a field, click the field in the **Column** list, and click the **Move up** or **Move down** button to move the field to the applicable column.

When you move a field in the Column list, the wizard automatically updates the column order number for the field.

4. Click **Next** to open the **Report Wizard - Field Options** dialog box.

13. In the **Report Wizard - Field Options** dialog box, define the individual report field settings.

 To define the settings in the Report Wizard - Field Options dialog box:



Column	Field
1	AUTHOR
2	BEGNO
3	ENDNO
4	DOCDATE
5	DOCTYPE
6	DOCTITLE
7	OCR1

Sum

☒ Total Width:

☒ Subtotal Decimals:

Break column:

Style:

☒ New page on new entry

☒ Suppress repetitive entries

☐ Underline hits

< Back Next > Cancel Help

In the Report Wizard - Field Options dialog box you can define settings for the individual fields in the report including totalling and defining how the Report Writer handles the data in the field, such as underlining search hits.

1. In the **Column** list, click the field you want add report settings for.
2. To print a grand total of the field data in the selected column, select the **Total** check box, in the **Width** field, type the total field size in number of characters, and in the **Decimals** field, type the number of decimal points you want to use in the grand total.

The Width and Decimals fields are only available when the Total check box is selected. The grand total is printed at the end of the report.

3. To print subtotals, select the **Subtotal** check box and in the **Break column** field, type the number of the column to break on for the subtotals.

A break column can be any other column in the report. The report should be sorted by the break column. For example, if the the subtotal column contains the PRICE field and the break column contains the PART_NUMBER. The PRICE column prints a subtotal whenever the PART_NUMBER changes, and it will print a grand total when the report is complete.

The Break column field is only available when the Subtotal check box is selected. Every time the column in the Break column field changes contents, Concordance will subtotal the field data.

4. To print each record on a separate page whenever the column's contents change between one record and the next, select the **New page on new entry** check box.

The database should be sorted by the selected field in the report column.

5. To suppress all repetitive entries in the selected field on the report, select the **Suppress repetitive entries** check box.

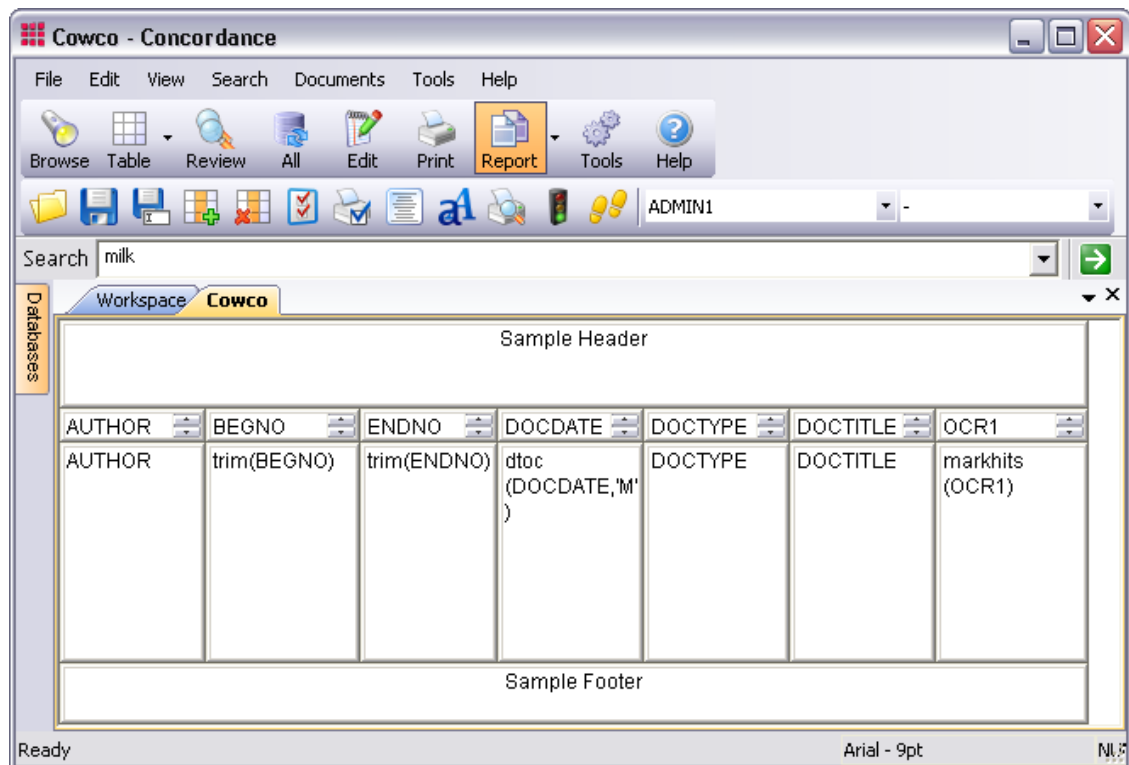
When the Suppress repetitive entries check box is selected, only the first instance of duplicate entries will be printed on the report. The report should be sorted by the selected field in the report column.

6. If you want all search hits in the selected field to be underlined on the report, select the **Underline hits** check box.

7. Click **Next** to open the **Report Wizard - Finish** dialog box.

14. In the **Report Wizard - Finish** dialog box, click the **Finish** button to create the report template.

Clicking the Finish button opens the report template within the Report Writer in Concordance, and the Report Writer toolbar is now displayed in Concordance below the Standard toolbar.



15. In the Report Writer, you can further customize the report, including adjusting the column widths, adding and removing columns, adjusting report settings, and adjusting text properties.

For more information about working in the Report Writer, see the *Concordance Report Writer User's Guide*.

16. Make the applicable edits to the report in the Report Writer.
17. Click the **Print Preview** button on the Report Writer toolbar to preview the report.
18. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report to the designated printer.

19. To save your report settings, on the **Report Writer** toolbar, click the **Save as** button.
20. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

 To generate a report using the Report Options dialog box:

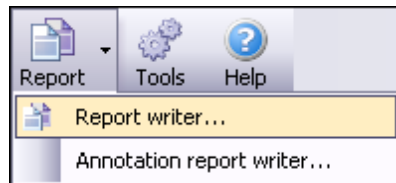
1. Run a search query to locate the documents you want to include in the report.

For more information about searching, see Available search tools.

2. In the **Table** view, use a table layout to organize the columns and column order you want to include in the report.

For more information about custom layouts see, Using table layouts.

3. With the **Table** view still open, on the **Standard** toolbar, click the down arrow next to the **Report** button and click **Report writer**.



Clicking Report writer opens the Report Writer dialog box.



4. Select the **Report Writer** option and click **OK**.

Clicking OK opens the Report tab in the Report Options dialog box.

5. On the **Report** tab, define the report's document range, record break, field printing, and column settings.

To define the settings on the Report tab:

On the Report tab, the First and Last fields default to the first and last record in the current Concordance query.

1. To modify the range of the records to be printed, in the **First** field, type the record number for the first record in the range you want to print, and in the **Last** field, type the record number for the last record in the range you want to print.

By default, only the Blank lines check box is selected in the Options section of the Report tab.

2. To print each record on a separate page, select the **New page** check box.
3. To disallow blank lines between each record on the report, clear the **Blank lines** check box.
4. To add a horizontal line between each record on the report, select the **Horizontal Lines** check box.

The Horizontal Lines check box is only available if you are also adding blank lines between each record.

5. To add vertical lines between each report column, select the **Vertical Lines** check box.
6. To print only the first line from each field in the report, select the **Summary report** check box.

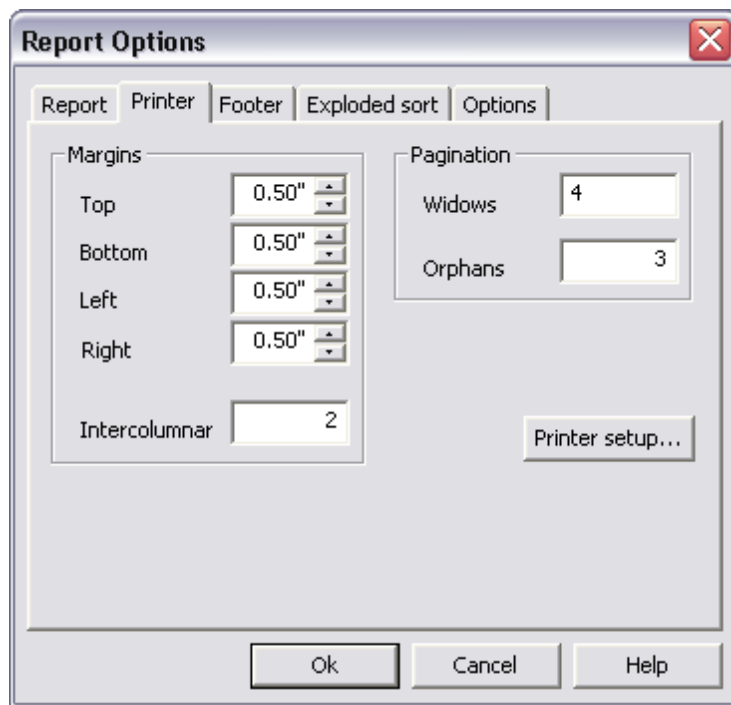
If you choose to only print the first line of each field, Concordance prints a summary report with one line per record.

7. In the **Enter the number of columns for the report** field, type the number of

columns you want to create in the report.

8. In the **Enter the maximum characters in each column** field, type the maximum number of characters allowed in each column. The default is 4096 characters.
6. Click the **Printer** tab to define the report's page margin and intercolumnar spacing settings, widow and orphan settings, additional page settings, and the default printer settings.

 To define the settings on the Printer tab:



On the Printer tab, all page margins default to .50 inches from the edge of the page, and the Intercolumnar (1/10th") field defaults to 2 tenths.

1. To edit the print margins, type or select the margin sizes, in inches, that you want to print on the report.

Some printers have an *unprintable* reserved area and the margins cannot be set below this limit.

2. To edit the intercolumnar spacing, in the **Intercolumnar (1/10th")** field, type or select the the spacing, in tenths of an inch, that you want to print on the report.

The intercolumnar spacing determines the distance between columns in your report.

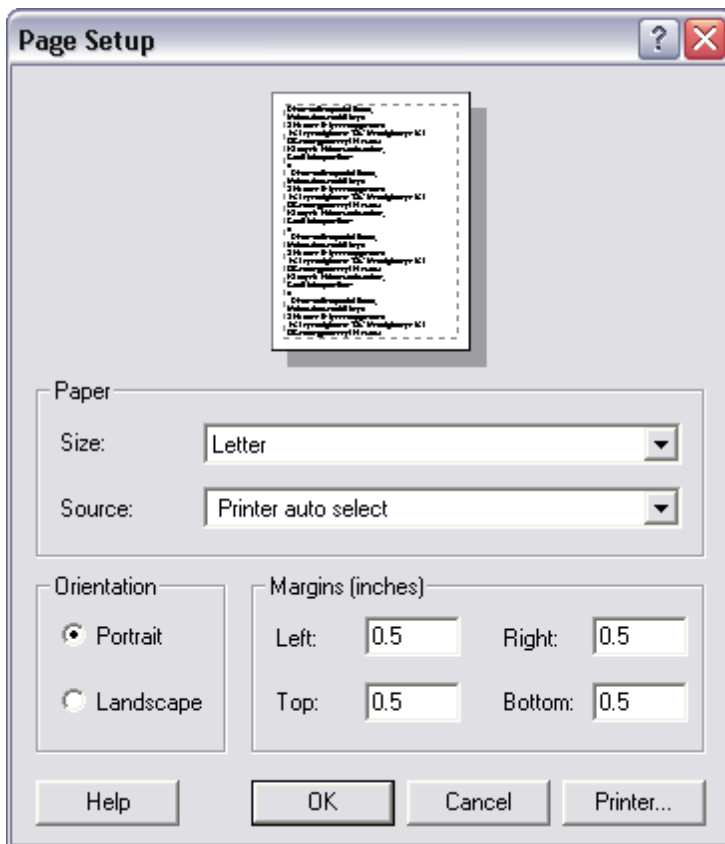
On the Printer tab, the Widows field controls the minimum number of lines

Concordance will allow to remain at the bottom of a page. If the number of lines to print at the bottom of the page is less than the value in the Widows field, then the document is moved to the top of the next page.

The Orphans field controls the minimum number of lines Concordance will print at the top of a page when splitting a document between pages. If the lines left to print are less than the value in the Orphans field, then lines are borrowed from the previous page until the orphan minimum is met. This may cause the preceding page to go below the Widows threshold, causing the entire column to print at the top of the next page.

The Widows field defaults to 4 lines and the Orphans field defaults to 3 lines.

3. To change the widows value, in the **Widows** field, type the number of lines you want the report to use for page widows.
4. To change the orphans value, in the **Orphans** field, type the number of lines you want the report to use for page orphans.
5. To change the paper size or source, page orientation or margins, or default printer, click the **Printer setup** button.
6. Clicking the **Printer setup** button opens the **Page Setup** dialog box.



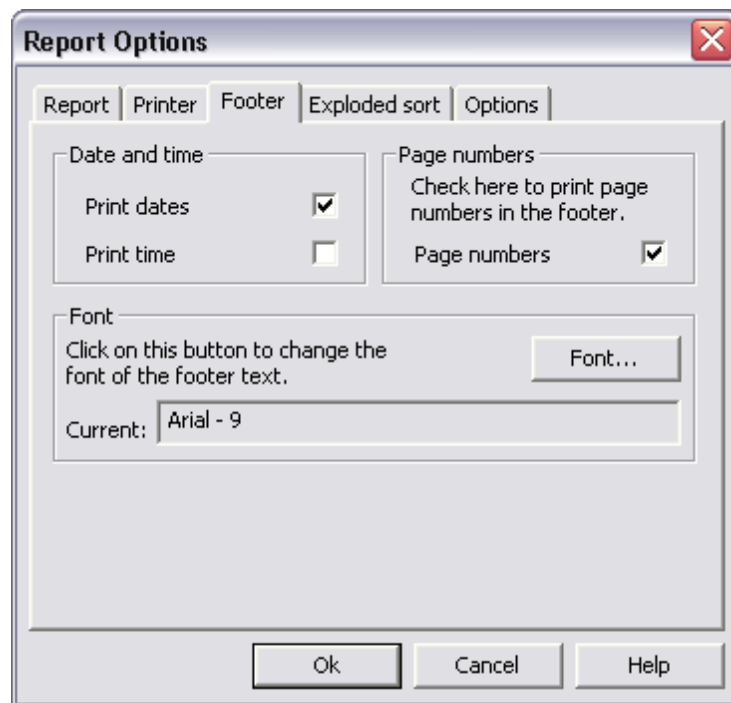
7. Make the applicable edits.

To change the default printer for the report, click the Printer button, make the

applicable edits, and click OK to save your changes.

8. In the **Page Setup** dialog box, click **OK** to save your changes and return to the **Printer** tab.
7. Click the **Footer** tab to define the report's page number, date and time stamp, and footer font settings.

☐ **To define the settings on the Footer tab:**



On the Footer tab, by default the Print dates, Print time, and Page numbers check boxes are not selected. If you choose to print page numbers and/or date and time stamps, they will be printed at the bottom of each page in the footer.

1. To print the current date, select the **Print dates** check box.

The date is printed in the lower-left corner of the report.

2. To print the current time, select the **Print time** check box.

The time is printed in the lower-left corner of the report.

3. To print page numbers, select the **Page numbers** check box.

Page numbers are printed in the lower-right corner of the report. The default font for footer text is Arial 9pt.

4. To modify the font settings, click the **Font** button.

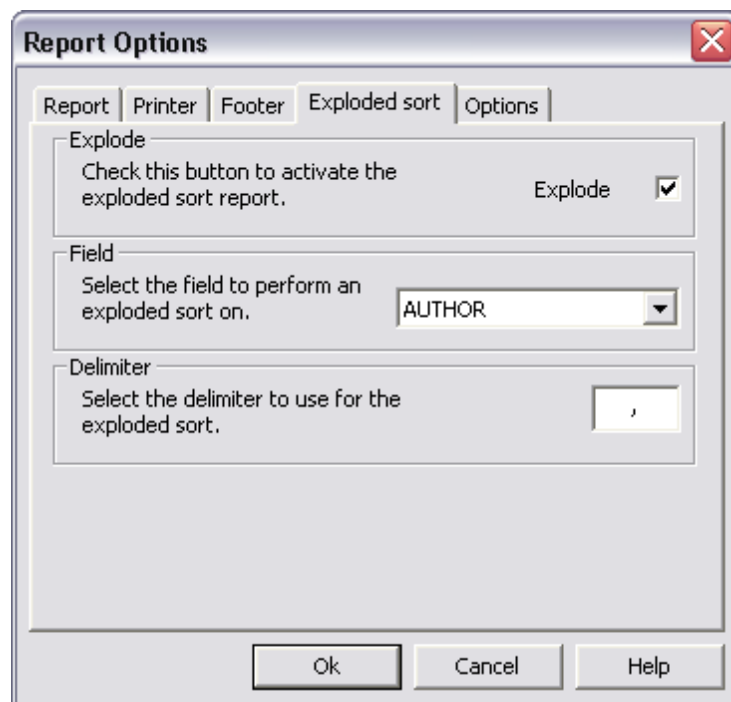
Clicking the Font button opens the Font dialog box.

5. Modify the font and click **OK** to save your changes.

The font settings apply to all text in the report footer.

8. Click the **Exploded sort** tab to define the report's exploded sort settings.

 To define the settings on the Exploded sort tab:



The screenshot shows the 'Report Options' dialog box with the 'Exploded sort' tab selected. The dialog has five tabs: 'Report', 'Printer', 'Footer', 'Exploded sort', and 'Options'. The 'Exploded sort' tab contains three sections: 'Explode', 'Field', and 'Delimiter'. The 'Explode' section has a checkbox labeled 'Explode' which is checked. The 'Field' section has a dropdown menu labeled 'Select the field to perform an exploded sort on.' with 'AUTHOR' selected. The 'Delimiter' section has a text box labeled 'Select the delimiter to use for the exploded sort.' containing a comma character. At the bottom of the dialog are three buttons: 'Ok', 'Cancel', and 'Help'.

An exploded sort is a report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record. Concordance determines each sub-entry in a field by grabbing the data between delimiters such as a comma. Any punctuation character can be used as the delimiter as long as it is used consistently.

 Exploded Sort Example:

An attorney has placed bibliographic entries for all of the documents needed in a case into Concordance. The counselor then searched for financial reports, and wanted to print a report showing each author alphabetically for an upcoming deposition. With a typical report, the attorney would get a printout sorted by the first author's name appearing in the author field. Finding a specific author's name would require looking through each multi-author entry in the report. Using an exploded sort places each author in alphabetical order in the first column, repeating the data in the other columns for each entry. Now the attorney can find the authors quickly and easily, during the deposition.

1. To create an exploded sort report, select the **Explode** check box.

If you do not want to create an exploded sort report, clear the Explode check box.

2. In the **Select the field to perform an exploded sort on** field, click the field you want to use for the exploded sort.

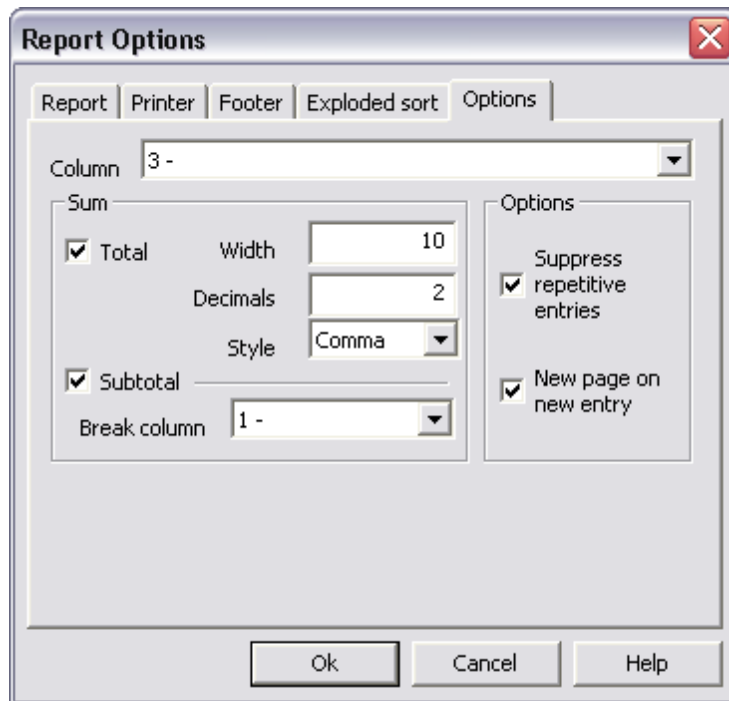
The field selected in the Select the field to perform an exploded sort on field will always be the first column in your exploded sort report.

Records should be sorted by the field used in the report's second column before entering the Report Writer. That way duplicate records are sorted by the second column's contents.

The Select the delimiter to use for the exploded sort field defaults to a comma.

3. To change the delimiter used for the exploded sort, in the **Select the delimiter to use for the exploded sort** field, type the delimiter you want to use.
9. Click the **Options** tab to define the report's individual column settings.

To define the settings on the Options tab:



On the Options tab, you can define settings for the individual columns in the report including totalling and defining how the Report Writer handles the field data in the column, such as underlining search hits.

1. In the **Column** list, click the column you want add report settings for.

2. To print a grand total of the field data in the selected column, select the **Total** check box, in the **Width** field, type the total field size in number of characters, in the **Decimals** field, type the number of decimal points you want to use in the grand total, and in the **Style** field, click numbering style you want to use for the grand total.

The Width, Decimals, and Style fields are only available when the Total or Subtotal check box is selected. The grand total is printed at the end of the report.

3. To print subtotals, select the **Subtotal** check box and then in the **Break column** field, click the number of the column to break on for the subtotals.

A break column can be any other column in the report. The report should be sorted by the break column. For example, if the the subtotal column contains the PRICE field and the break column contains the PART_NUMBER. The PRICE column prints a subtotal whenever the PART_NUMBER changes, and it will print a grand total when the report is complete.

The Break column field is only available when the Subtotal check box is selected. Every time the column in the Break column field changes contents, Concordance will subtotal the field data.

4. To suppress all repetitive field data entries in the selected column on the report, select the **Suppress repetitive entries** check box.

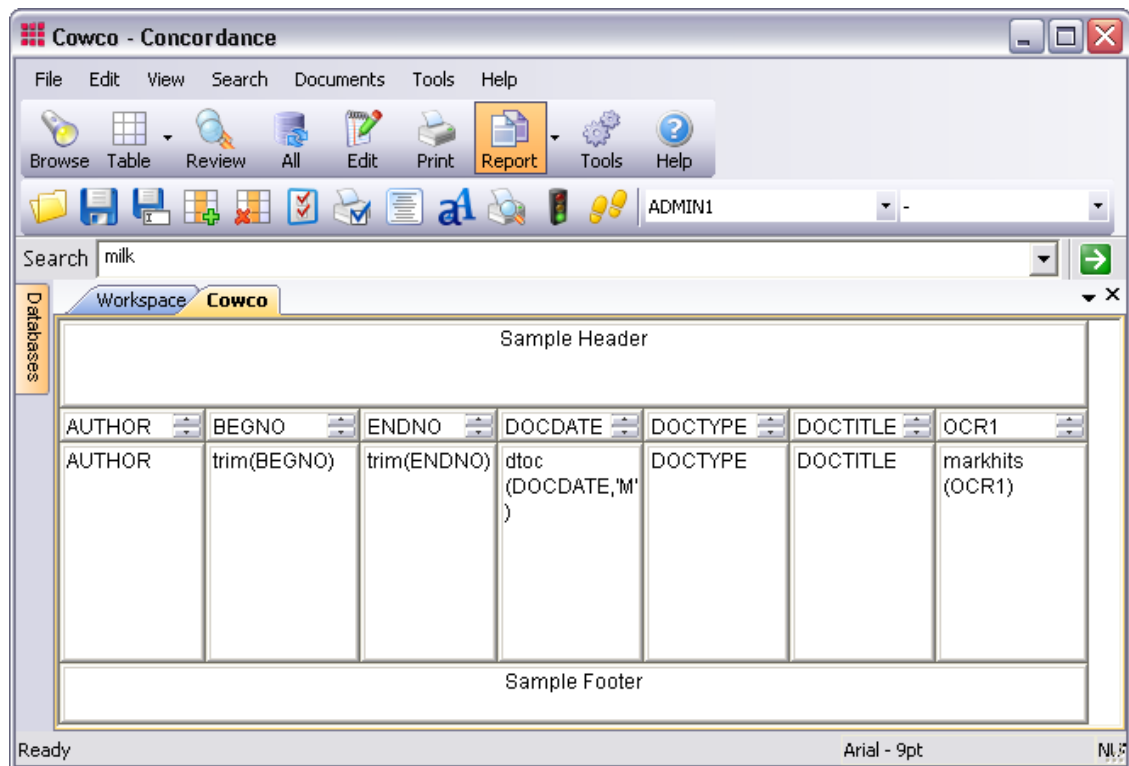
When the Suppress repetitive entries check box is selected, only the first instance of duplicate entries will be printed on the report. The report should be sorted by the selected field in the report column.

5. To have the report print each record on a separate page whenever the column's contents change between one record and the next, select the **New page on new entry** check box.

The database should be sorted by the selected field in the report column.

10. Click **OK** to create the report template.

Clicking OK opens the report template within the Report Writer in Concordance, and the Report Writer toolbar is now displayed in Concordance below the Standard toolbar.



11. In the Report Writer, you can further customize the report, including assigning fields to columns, adding header and footer text, adjusting the column widths, adding and removing columns, adjusting report settings, and adjusting text properties.

For more information about working in the Report Writer, see the *Concordance Report Writer User's Guide*.

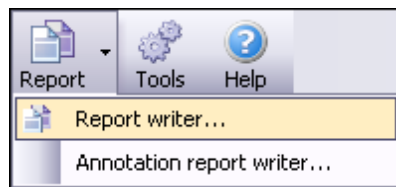
12. Make the applicable edits to the report in the Report Writer.
13. Click the **Print Preview** button on the Report Writer toolbar to preview the report.
14. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report to the designated printer.

15. To save your report settings, on the **Report Writer** toolbar, click the **Save as** button.
16. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

To edit an existing report in the Report Writer:

1. In the Table view, on the **Standard** toolbar, click the arrow next to the **Report** button and click **Report writer**.



Clicking Report writer opens the Report Writer dialog box.



2. Select the **Open existing report** option and click **OK**.

Clicking OK opens the Open dialog box.

3. Navigate to and open the report .arp file you want to edit.

The report opens in the Report Writer in Concordance.

4. Make the applicable edits to the report in the Report Writer.

For more information about working in the Report Writer, see the *Concordance Report Writer User's Guide*.

5. Click the **Print Preview** button on the Report Writer toolbar to preview the report.
6. When you are ready to print the report, to send the report directory to the designated printer, click the **Print** button in the print preview screen.

To make any final print adjustments before printing, click the Print button on the Report Writer toolbar to open the Print dialog box, edit the print settings, and click OK to print the report the the designated printer.

7. To save your report settings to the current .arp file, on the **Report Writer** toolbar, click the **Save** button.

To save your report settings to a new .arp file, on the Report Writer toolbar, click the Save as button.

8. To close the report, on the **Report Writer** toolbar, click the **Exit** button.

For more information about using the Report Writer, including using the Report Writer with CPL scripts, see the *Concordance Report Writer User's Guide*. You can request a PDF file of the guide from Concordance Technical Support.

Supporting Reviewers

Supporting reviewers

As an administrator, your job is to support the document review team by providing the best database structure and maintenance for document review, on a case-by-case basis. The more you can learn and understand from a reviewer's perspective and the needs of each particular case, the easier your job becomes in providing proper support.

This topic covers the administrative information and activities that you will need to perform to support reviewers in searching, saving queries, sorting, and tallying.

How to Support Reviewers:

Searching

Administrators should understand basic searching concepts used in Concordance, including how to differentiate between full-text and relational clauses, and how to use search operators and wildcards. Understanding these concepts helps you troubleshoot questions or problems reviewers may have when learning to use Concordance.

Searching Overview:

- Full-text searching uses the .dct and .ivt files
- Full-text searching is very fast, highlights hits in red, searches multiple fields
- Relational searching searches the entire database each time
- Relational searching uses different operators, searches one field, runs slower, and does not provide keyword highlights

Tips to Increase Search Processing Speed:

- Reviewers can speed up relational searching by placing a full-text search clause before the relational clause to cull down the amount of data Concordance must read in real time
- Check the Key box on fields to improve relational search processing speed
- Locate empty or not empty paragraph fields (empty: `fieldname = ""`, not empty: `fieldname = *`)
- Search for punctuation with relational searching (OCR co %) or globally replace punctuation with `a%a`, then reindex and run a full-text search

Tips for Assisting Reviewers:

- Verify that users are not running relational searches on paragraph fields

- Verify that reviewers are placing a full-text search clause before the relational clause to cut down search processing time
- Verify that search syntax is correct
- Verify the search terms are included in the dictionary
- Verify that the field is indexed for full-text searching
- Reindex the database to ensure all updates are available to reviewers

Related Topics

About searching
Available search tools

Creating a Synonyms List

Creating a synonyms list for your database increases your reviewers search capabilities by locating results for words that have similar meanings or alternative names. Synonyms can be based off of words already entered in your database dictionary, creating a permanent link between them, or other search terms in Concordance. You can also create synonyms from the fuzzy words list, to include homonyms or words that *look like* and *sound like* those already in your dictionary and synonyms listings. Fuzzy words provide a 65% character match on search terms, but fuzzy searches can miss words longer than the search term.

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

 If your reviewers are receiving over-inclusive results or search time is getting bogged down, this is one area you can check for shaving off processing time. You can easily edit the list later, if need be.

For more information about creating a synonyms list, see [Creating a synonyms list](#).

Saving Queries

Reviewers can save their search history by saving a query file from a current Concordance session. By doing so, they can later restore those same searches to create new complex searches and/or capture query results on database updates. Saved query files can also be executed on different databases if the field names used in the searches match. Please note that restored query files will update internal search number references in the Review view.

As an administrator you may need to help reviewers save or modify query files, and clear their search history from the database. Searches are saved in a .qry file and are editable text files containing only the search string.

Search Query Options:

- Use the Save all Queries command on the Search menu to save all searches in the current query session to a .qry query file.

- Use the Execute Saved Queries command on the Search menu to relaunch a previous query saved to a .qry file, and capture any new and/or edited data since the initial search was run.
- Use the Clear Search History command on the Search menu to delete the search history when you index, reindex, or pack the database.

Related Topics

Saving search queries
 Reviewing search queries
 Running previous search queries

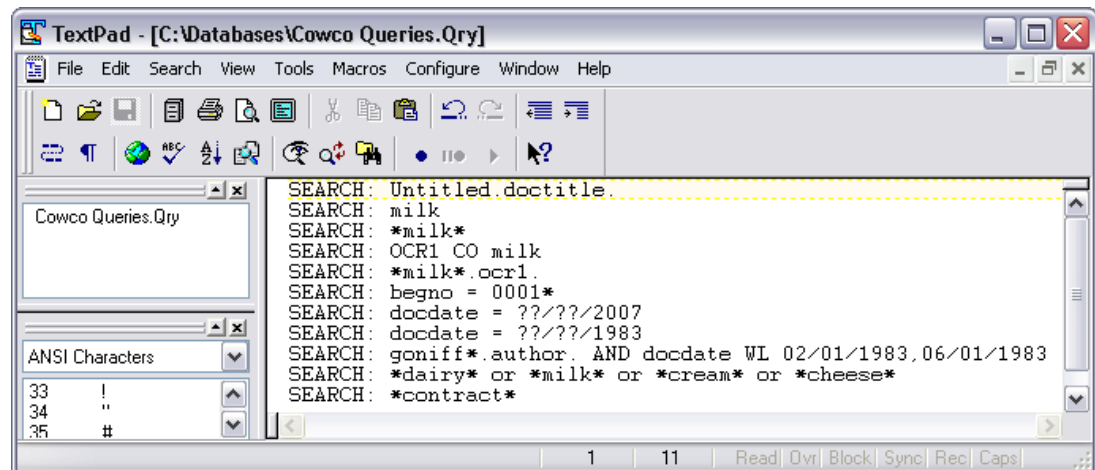
Modifying Query Files

Query files are text files that contain only the search string. These files can be opened and edited in any text editor program, such as Notepad, TextPad or UltraEdit. Reviewers may want to modify a saved query file to write new complex search queries and then run the edited query file on a database. However, as an administrator, you will typically review these files in order to delete unnecessary queries that you do not need to store or rerun later.

To modify a query file:

1. Locate the query (.qry) file you want to modify.
2. Right-click and open with any text editor program you want to use to modify the file.

If the text editor program is not listed, click Choose Program to locate the text editor program.

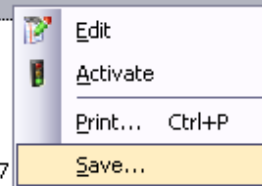


3. In the text editor program, make the applicable edits and save your changes.

Saving Search Results

In the Review view, you can print your search results or save them to an ASCII text file by right-clicking your mouse in the center of the view. If you save your search results to a text file from the Review view, the search terms and search results information saved to the text file can be used as a backup of search results in a report format in case a reviewer needs to prove what search criteria was used during an e-discovery.

Search Number	Number of Hits	Number of Docs	Search Term(s)
00000	203	203	<Entire Database>
00001	53	53	Untitled.doctitle.
00002	635	47	milk
00003	1,353	105	*milk*
00004	103	103	OCR1 CO milk
00005	1,317	103	*milk*.ocr1.
00006	158	158	begno = 0001*
00007	0	0	docdate = ??/??/2007
00008	133	133	docdate = ??/??/1983
00009	2	2	goniff*.author. AND docdate WL 02/01/1983,06/01/1983
00010	1,386	107	*dairy* or *milk* or *cream* or *cheese*
00011	66	37	*contract*



Clearing Searches

Clearing reviewers' search history allows you to erase all searches from a current Concordance work session without reopening a database, and it allows users to start the new search session without looking at the results of previous searches.

To clear search history, on the Search menu click Clear Search History. The user's search results in the Review view will be erased and reset except for the All query used to locate all records in the database.

 We recommend that you save a user's searches to a .qry file before clearing them from Concordance. Once you have cleared a user's search history, there is no Undo function to retrieve this information.

Tallying Records

Tally is a great sorting tool for a quick record count and for quality assurance checks. You can search on a unique value within a field and also print a list of these results.

Tally is also useful to organize documents in preparation for printing reports. The Tally feature is only accessible by right-clicking on a field in the Table view and clicking Tally.

Related Topics

Searching by tally
Tallying records for reports

Customizing Table Layouts

The document listing in the Table view can be customized by viewer preference or for viewing particular query results. Each user can create one private table layout per database that is not viewable by other users, except the database administrators. Private layouts are identified by the user ID in the layout name.

All layouts, except for private layouts, are made public to all users in the database and stored in the .layout file. We recommend that you implement custom table layout guidelines for your organization, because too many table layouts may result in a cluttered layout menu tree. A database's .layout file can be used and copied to other databases, which is useful when working with concatenated database sets. If you are experiencing problems with users creating too many layouts, you can set up a group of standard layouts and make them read-only. Any layout customizations that users may want can be done using their private layouts.

For more information about layouts, see [Using table layouts](#).

Saving Snapshots

Snapshots are a point-in-time picture of a user's work history and helps them track and preserve their search history and search results. Saved snapshots can be restored to see what the contents of a database were on a particular day and what search results were found at that moment in time. Snapshots only store historical data, such as searches, the last record selection, and the last sort performed during a user's Concordance session.

When a saved snapshot file is restored, Concordance automatically opens the databases associated with the file, with all queries and sorts preserved.

Users may also choose to have the auto-restore feature turned on, which is a feature similar to saving a snapshot. An Auto-restore snapshot file contains that last record selection and last record viewed at the end of a Concordance session, so when users next access Concordance they can resume reviewing where they last left off. Unlike manually saved snapshot .snp files, the Auto-restore file is overwritten each time the user logs out of Concordance.

Snapshot Overview:

- Snapshots are saved as non-editable .snp files and can only be restored on original databases
- Auto-restore will not work if a user does not have Microsoft Windows permissions
- Sometimes Auto-restore will not work if the most recently used (MRU) feature is disabled

 If reviewers make a practice of saving snapshots at the end of every work session, we recommend that you periodically review and delete outdated or unnecessary .snp files due to their large file size on a hard drive or network.

For more information about saving snapshots, see [Saving and restoring snapshots](#).

Sorting Records

The results of any search are sorted in the order in which documents are added to the database, and typical sorting only affects current search results. Administrators, however, have the means to permanently apply a sort order to a database.

Reviewers may want to have documents permanently sorted in a database chronologically, or by author, type, or other field, to help speed up their review. We recommend that you only accommodate this request under special circumstances due to the time involved in managing these extra files and databases.

Sorting Overview:

- The default sort order of all queries is the record creation or load order of the documents when they were added to the database (accession number)
- Sorting can be done on up to 16 fields at one time with a maximum character limit of 1,000
- Sorting of paragraph fields is done on the first 60 characters only and uses the longest value in the field up to 60
- Sort order is temporary and only applies to the current query
- Speed up sorting by selecting the Key check box for database fields in the Modify dialog box.

For more information about sorting records and field data, see [Sorting documents](#).

Permanently Sorting Database Files

You can permanently sort databases using two methods:

- Export the database
- Replicate the database

To permanently sort a database, sort the records in the database the way you want them to be permanently sorted, then export or replicate the database to a new database to replace the original database.

To permanently sort a database:

1. Back up the original database.

For more information about backing up Concordance databases, see [About backing up databases](#).

2. In Concordance, open the database you want to permanently sort.

3. Sort the database.

For detailed steps on sorting a database, see [Sorting documents](#).

To permanently sort a database you can either export or replicate the database.

Exporting a database does not export the database's security settings. Replicating a database preserves the database's security settings.

4. To export the database, on the **Documents** menu, point to **Export**, and click **As a Concordance database**.

The accession number is reassigned in your new database to match the import order.

For detailed steps on exporting a database, see [Exporting databases](#).

5. To replicate the database, on the **Tools** menu, point to **Replication**, and click **Create a replica**.

For detailed steps on replicating a database, see [Replicating databases](#).

Once you have named the database with its new sort order, you can start using your new database. You will need to delete or archive your old database.

Troubleshooting

Isolating issues

Reference this section to review troubleshooting information and common issues that you can resolve, perhaps avoiding a call to Concordance Technical Support or isolating the issue so a support analyst can better assist you.

If you find yourself challenged with Concordance working properly, we've provided you with a checklist to help you isolate where a problem resides: computer, network, or application.

Once you've run through this checklist, you'll most likely discover where the issue lies and can determine the course of action needed to resolve an issue. If you find you still have difficulties after reviewing items on this checklist, you may want to enlist a Concordance Technical Support analyst for research feedback.

Isolating Issues Checklist:

- 1. Is your problem happening to one person or all users?**

If it's one person, there's potentially something wrong with the computer itself, such as the user's network privileges or another setting. Please check to ensure that the user is granted full privileges.

- 2. Is the problem only with this computer?**

If so, you may need to rebuild the system profile.

Test whether the user can log into a Concordance database from another computer. If so, the problem is most likely the computer and not the application.

3. Is the issue occurring only in one database or all databases?

Determining this helps isolate whether it's a database or system issue.

Depending on the setup, try moving a database to a location other than its current placement.

Desktop to server or server to desktop.

Resolving common issues

Avoid time-consuming emails and calls to Concordance Technical Support by resolving issues on your own. Here is a list of the most frequent issues that clients run into while administrating Concordance and the steps you can take to fix them yourself:

Full Network Rights Given to Users

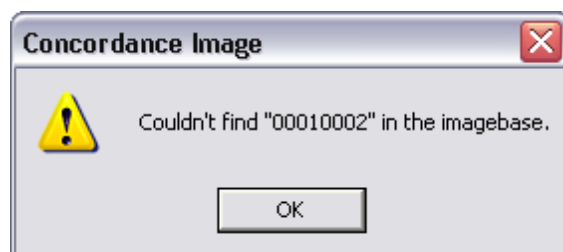
This issue made it as Number 1 for a reason. Many of our technical support calls can be resolved with this easy fix.

If you find there are users having issues with accessing aspects of Concordance or there are other problems occurring, you'll want to verify that all users have full read/write privileges in the directory where each database resides.

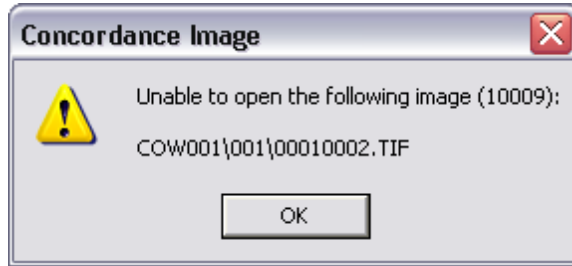
File Path Problems

Whether you are trying to view images in Concordance Image or trying to launch a hyperlink to a native document or email attachment, there are times where you may run into the following issues:

Concordance Image File Paths



Receiving this message means you didn't register any image information to the .dir file, whether it was by registering an image load file or by scanning the image directories.



Notice that this message lists a path. Concordance Image is looking in that listed path to find image file 00010002.tif.

You can copy the path in this dialog box by selecting CTRL + C. Next, on the Start menu, click Run and type in the listed path and click OK. If Microsoft Windows cannot find the file, then the path is incorrect. You will need to fix the directory path stored in the imagebase.

No message: Nothing happens

If this occurs, consider the following:

Your viewer setting on the Viewer tab in the Preferences dialog box are pointing to the incorrect viewer.

For more information about viewer settings, see Defining preferences.

The image attribute is not enabled for the beginning Bates number field in the Modify dialog box.

There may be something wrong with the image file itself. First, navigate to that specific image file on your server and try to launch it using the default Microsoft Windows program selected. If Windows can't open it, you'll need to take steps to get a corrected image from your vendor or producing party, if possible. This scenario usually produces either of these messages *couldn't find* or *unable to open*.

Native Files and Attachments

When clicking on a native document or attachment hyperlink and nothing happens, on the Start menu, click Run and type the listed path and click OK.

Windows may open a dialog box saying it can't open the file. It will ask you what program to use to launch the file. This occurs when Windows doesn't recognize the file extension. For example, if you just downloaded Adobe® Reader®, Windows may not recognize the .PDF extension and which program to use to launch it.

Once you select the program from a list in the dialog box, ensure that the *Always use the selected program to open this kind of file* is checked. In the future, the document hyperlink in Concordance will correctly launch the native document.

If Microsoft Windows can't find the file, then there is a problem with the path listed in Concordance.

For more information about the various ways to fix a directory path, see [Editing the image directory path](#).

For more information about updating hyperlinks, see [Updating hyperlinks](#).

Image File Problems

If a user finds an image file that won't open, the TIFF image file may be corrupt.

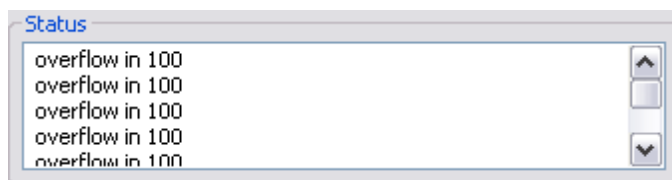
Follow these steps to resolve the issue:

1. In Concordance Image, on the **File** menu, click **Open Image** and navigate to the physical .tif image file that has problems. If the image opens properly, then the problem is either an incorrect file path name stored in the imagebase or the TIFF file name doesn't match the image alias information to link it properly to the Concordance document record. Sometimes, the physical image file name has too many or not enough zeros, even though it was referenced correctly in the load file. To resolve the problem, navigate to the image file on your network and manually rename it to match it with the image alias that is stored in the imagebase.
2. If the image file does not open in Concordance Image as listed above, try launching the image file directly from the network directory. The image should open in the default Microsoft viewer. If it opens successfully, then the image may not be in a format that is acceptable by Concordance Image. Recreate the TIFF or print the image to a hard copy and rescan it to TIFF. Once you have a new image, replace the .tif file in the proper directory and it should open in Concordance Image.
3. If the image file does not open by the default Microsoft viewer, an error message typically displays. In this case, you'll need to contact your source and ask for a new copy of the .tif file.

Overflow Message During Import

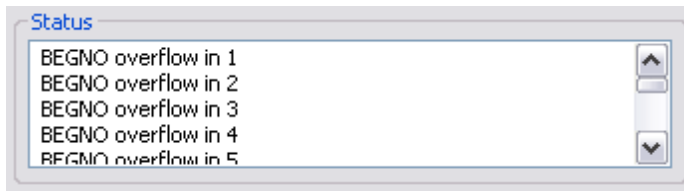
When importing data, you may receive various overflow messages in the Data Overflow or Status box.

Here are some examples:



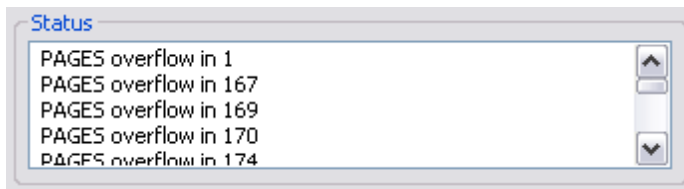
If your message looks like this, then Concordance ran into an error on line 100 within the delimited text file you selected to import.

You'll want to open up the delimited text file, navigate to line 100 and verify that the delimiters are correct and in place with the file containing a hard carriage return at the end.



This message is listed with the first selected field (BEGNO) followed by an overflow in every document. Most likely the problem is an incorrect import dialog selection for the delimiters.

Verify what is used in the delimited text file and that your selection in the Import Wizard or dialog box in Concordance matches. You will also want to verify your other delimiter selections as well.



For this type of error message, there are many possible reasons that an error occurred. You will want to verify your delimiters, check your Modify dialog box to ensure that the field type matches the type of data that is being imported in, and also verify that the field order in the import selections matches the delimited text file.

Once you have modified your selections, be sure to save a new copy of your delimited text file prior to import. Next delete any records loaded incorrectly or on the File menu, point to Administration, and click Zap if it is your first import in the database.

Because mistakes can occur during an import, it is best practice to always import additional delimited text files into a duplicate empty structure of your main database to ensure that everything loads properly. Once everything looks correct, use the matching import process to bring in the new records.

For more information about the matching import process, see Loading additional data into databases.

View Image (camera) Button Is Not Highlighted

If the View Image (camera) button is unavailable and grayed out when you are ready to manage your imagebase, you most likely forgot to select a field in the database as the Image key.

You will need to open the Modify dialog box and select the Image check box for a unique field, typically your beginning Bates number. Once you have made your changes, be sure to run a full index. After indexing the database, close Concordance and re-launch your database. The View Image button should now be available.

Indexing Takes Too Long

If your indexing speeds take too long, you'll want to check the following:

- **Indexing Cache Preferences and Recommendations**

First, review to the Cache Preferences and Indexing Speed Recommendations sections in the Before installing Concordance topic.

The Cache Preferences section provides a formula for allocating RAM specifically for the indexing process. For maximum speed, we recommend allocating 2 GB to your machine.

- **How many database indexes are you running on your machine?**

Having indexes for each database run on individual machines greatly improves speed since you're able to allocate more memory to processing one database, rather than having to share it across multiple databases at the same time.

- **What is the size of your database?**

Record sizes vary based on how many metadata fields there are and how large your OCR text fields may be. The smaller the database: the faster your index processing.

If your databases are too large, one option is to separate them into smaller databases and concatenate them for review.

For more information about concatenating databases, see [Joining multiple databases](#).

[Offset Hit Highlighting](#)

If you search for terms using full-text search strings and the hit highlighting is not working, here are steps to resolving the issue:

1. First, export one record that had hit highlighting issues to another Concordance database. This way, you can test the issue without impacting your reviewers.
2. In the exported database, view this record in the **Edit** view. Right-click the field where offset hit highlighting occurred, and click **Reset field formatting** on the shortcut menu.
3. Reindex the database and try searching on the same search term to see if the hit highlighting issue is resolved in the record you just formatted.

If the problem is resolved, this was a rich text formatting issue. Sometimes, there can be problems with HTML hexadecimal color codes and .rtf files. Once these files have been imported into Concordance, the index may be offset in correctly identifying your hit terms. You can reset the field formatting on each individual record and reindex as listed above to resolve the issue.

If the issue has impacted a large number of records, there is a CPL script that can reset the field formatting of all records in a query set.

4. If the problem persists, then there is an issue with the .ivt file. Take the entire database offline and then run a full index.

[Errors on Dictionary and .ivt Files](#)

If you receive a message that your dictionary or inverted text (.ivt) files had errors or were not found, then you'll want to rename the following files by adding *OLD* to the file name, and then run a full index: .dct, .ivt, .fzy, .key.

[Unable to Read and/or Write to Fields](#)

1. If you come across a field that is read-only in the **Edit** view that you intended to have full access to, you may have applied security settings to the entire database.

First, check the Field rights tab in the Security dialog box to verify the given access to each user. Second, check the specified field in the Data Entry Attributes dialog box as it can override a field's settings in the Security dialog box.

2. If you created a new field in the **Modify** dialog box and security is enabled, you need to ensure that the new field has read/write access in the **Security** dialog box for each individual user.

Be careful to check these settings prior to running productions. You may have forgotten to create production fields in the database creation phase to store your new beginning and ending production numbers.

Once you create these new fields, they are listed as options in the Production Wizard to cross-reference your new production numbers. But if you did not adjust security field rights for read/write access prior to initiating the production process, the numbers will not be written to the production fields.

Issue Tags

- **Issue Tags in version prior to Concordance 10:**

In versions prior to Concordance 10, issue tags can sometimes be unintentionally and unknowingly be created by users. Issue tags are used to flag a text clip within a document. Typically, issue tags are created by highlighting important text, using the new Note command. In the Notes dialog box, you can then create and apply issue tags. You can also create issue tags by highlighting text and then clicking directly on the tags displayed in the Tags panel.

In the Tags panel, though, the issue tag also displays by changing the document-level tag name to red with a gray highlighted box. This notifies the user that there is an issue tag applied to the document.

Again, sometimes this occurs unintentionally and unknowingly by users. If this happens, you can run the IssueToTag CPL to change all issue tags back to document-level tags.

- **Issue Tags in Concordance 10:**

For version 10 databases, the user must now highlight the text, hold down the Shift key and then select the tag in order to create an issue tag. If the user attempts or accidentally highlights text and then selects the tag without holding down the Shift key first, they will receive a message instructing them of the new method for issue tagging. This setting can be changed back to the older method in the Issue Coding section on the Browsing tab in the Preferences dialog box.

Unicode Support

About the Unicode Standard

The Unicode Standard provides a consistent way to digitally represent the characters used in the written languages of the world. As an accepted universal standard in the computer industry, the Unicode Standard assigns each character a unique numeric value and name. This encoding standard provides a uniform basis for processing, storing, searching, and exchanging

text data in any language.

In Concordance version 10.x, the Unicode Standard is supported in Arabic, Chinese, English, Hebrew, Japanese, Korean, Russian, and other languages.

- ✍ Some Adobe PDF files with Arabic text do not display the Arabic text in the proper right-to-left order in Concordance. These PDF files display the text in reverse order (left-to-right) because the files report the language incorrectly or are not in the standard format.

Support for the Unicode Standard required major database structure changes. For example, Concordance version 10 is installed in a new default directory and all databases need to be converted to version 10.x or later.

Installation and Database Compatibility

Supporting the Unicode Standard requires the following installation and database changes:

Installing Language Packs

To display characters in Unicode within Concordance, the appropriate language packs need to be installed on the computer.

For more information, see *Installing language packs*.

Concordance Installation Changes

Concordance version 10 installs to a new default folder, ...*\LexisNexis\Concordance 10*, and includes a new Add or Remove Programs dialog box entry and a new registry key. This allows Concordance version 8, Concordance 2007, and Concordance version 10 to exist on the same computer.

Database Compatibility

Due to the major database structure changes required by the Unicode Standard, all databases need to be converted to version 10.x or later. Earlier database versions cannot be opened in Concordance version 10.x. Only database versions 7, 8, or 9 can be converted to version 10.x.

Since there is no backwards compatibility to older database versions in Concordance version 10.x, opening a database version 7, 8, or 9 prompts the user to convert the database to version 10. If the user chooses not to convert to version 10.x, the database will not open in Concordance version 10.x.

Alternatively, all databases in a selected folder and subfolders can be converted to version 10.x. For more information, see *Converting databases*.

Currently, the Unicode Standard is supported when importing, searching, printing, and exporting documents in the languages listed above. However, certain issues and tips are important to know when using these features with a non-English document.

Import Issues and Tips

The Unicode Standard is supported when importing documents into Concordance. For more information about importing documents, see About importing files.

The following issues and tips are important to know when importing non-English documents:

Right-To-Left Documents

When importing documents with Right-To-Left (RTL) languages, such as Arabic, the imported text may be incorrectly justified to the left side. To correct this and change the justification to the right side, select the text and press the right [Ctrl] +right [Shift] keys.

Microsoft Excel Files

When importing Microsoft Excel files in Right-To-Left (RTL) languages, the spreadsheet cells may be displayed Left-To Right instead of Right-To-Left.

File Names

Files names containing Unicode characters are supported in Concordance.

Delimiters

The delimiters available from the drop-down lists in the Import Wizard, *Import Delimited Text* dialog box, and the Overlay Database dialog box may appear as square symbols or may not be displayed. How the lists are displayed depends on the computer's language environment.

The delimiters listed below use the Tahoma font, which displays the characters regardless of the language environment. All of the characters listed below can be selected as a delimiter, even if the symbols they represent do not appear in the drop-down lists.

To see the list of available delimiter characters, see About delimiter characters.

Search Issues and Tips

The Unicode Standard is supported when searching documents in Concordance. For more information about searching, see Available search tools.

The following issues and tips are important to know when searching non-English documents:

Removing Kashida Characters

Kashida characters are used in Arabic text to lengthen a word by elongating characters at certain points. The added Kashida characters change the word.

For example, the word for *Term* in Arabic is مصطلح. When Kashida characters are added, the word changes to مصطلح.

Searching for the word *Term* with Kashida characters results in inaccurate search results since it will not include the word *Term* without Kashida characters.

To prevent inaccurate searches, the Concordance administrator can remove the Kashida characters from the searchable text in the current database.

 To remove Kashida characters:

1. On the **File** menu, point to **Administration**, and then click **Remove Kashida characters**.
2. Enter the administrator user name and password.
3. Click **Yes** to confirm.

The Kashida character removal is permanent and there is no process to convert back to the earlier version. We recommend you make a backup copy of the databases before performing this action.

Kashida characters are automatically removed from the current database. The status is displayed in the Global Replace dialog box. When finished, the dialog box closes.

4. Reindex the database after the Kashida characters have been removed to update the database with these changes.

For more information about reindexing, see Indexing and reindexing updates.

 Words that Sound Like the Selected Word

When doing an Advanced Search from the Search task pane, selecting Display a list of words that sound like the selected word (also known as *Fuzzy Search*) only works with English language words. Using this option with words in other languages will display a list of words that do not sound like the selected word.

For more information about Fuzzy Search, see Using the Advanced Search panel.

 Navigating Search Results for Ideographic Languages

A character in an ideographic language, like Chinese, can represent a word. When navigating search results, each character is considered a separate hit. Clicking the Next hit and Previous hit buttons jumps to the next character in the search results.

For example, if your search term is the Chinese word for *Mandarin Language School* (国語学院) you will need to click Next hit four times for each word.

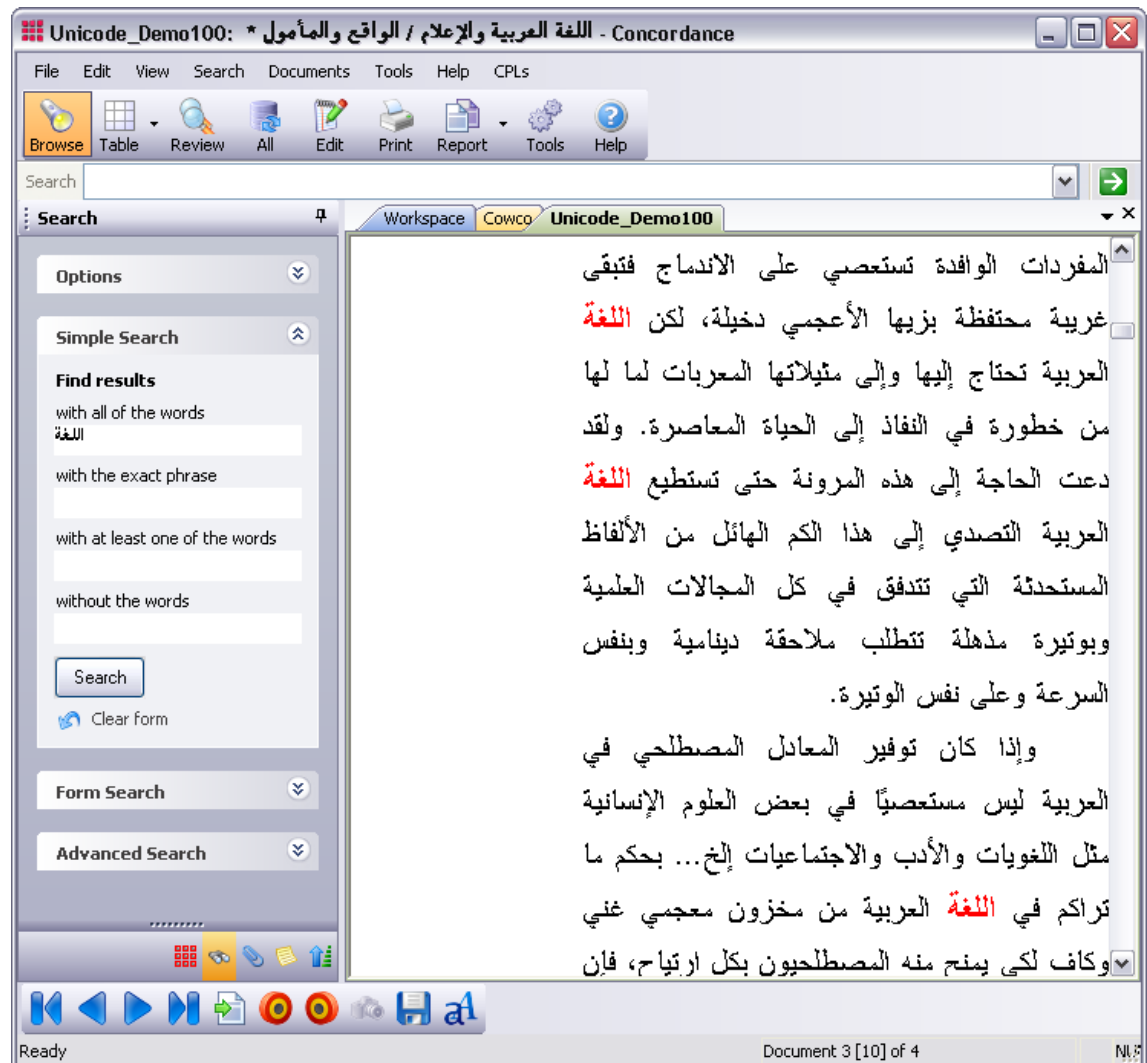
 Search Examples

Here are examples of searching Arabic and Japanese documents in Concordance.

Simple Search in Arabic

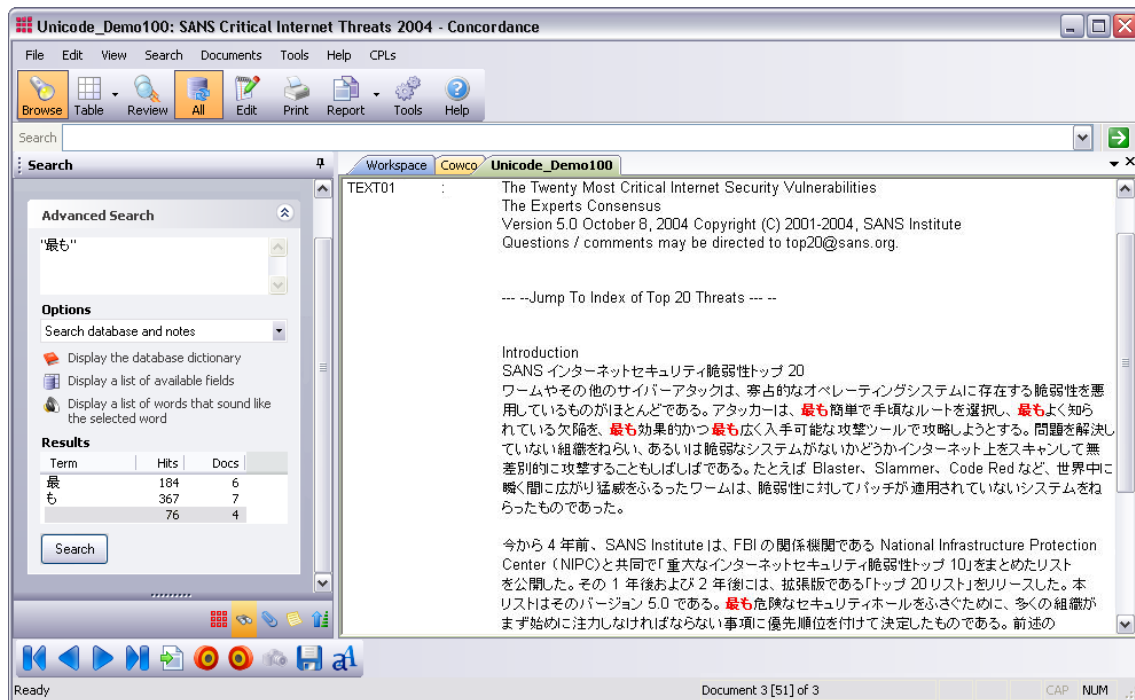
You can use Simple Search to find non-English words in your documents. The example below shows how Simple Search is used to find the word **اللغة**, which means *language* in Arabic.

Some Adobe PDF files with Arabic text do not display the Arabic text in the proper right-to-left order in Concordance. These PDF files display the text in reverse order (left-to-right) because the files report the language incorrectly or are not in the standard format.



Advanced Search in Japanese

Advanced Search can also be used to find non-English words in your documents. The example below shows an Advance Search for the word "最も", which means *most importantly* in Japanese.



Edit Issues and Tips

The Unicode Standard is supported when using the Edit features in Concordance. For more information editing in Concordance, see About editing records.

The following issues and tips are important to know when using the Edit features with non-English documents:

Data Validation Options

Database fields can be assigned data validation options from the Data Entry Attributes dialog box. However, certain validation options are only supported with English text. These include:

- Upper case
- Lower case
- Alphabetic only
- Numeric only

For more information about data validation, see Creating databases.

Match Whole Word Only

When searching for text using the Find or Replace commands, the Match whole word only check box does not work with ideographic languages such as Chinese. Clear the Match whole word only check box before searching for text in these languages.

Print Issues and Tips

The Unicode Standard is supported when printing documents in Concordance. For more information about printing, see About printing.

The following issues and tips are important to know when printing non-English documents:

Additional Options for Hit Highlighting

When printing documents with ideographic text, like Chinese, a character underlined for hit highlighting can easily be confused with other characters.

To allow hit highlighting in these languages, additional options have been added to the Formatting tab in the Print documents dialog box. Now you can use underline, bold, italics, color formatting or a combination of these options to highlight the search hits in your reports.

For more information about using the Formatting tab, see Printing standard reports.

Export Issues and Tips

The Unicode Standard is supported when exporting documents from Concordance. For more information about exporting documents, see About exporting data.

The following issues and tips are important to know when exporting non-English documents:

Exporting to ANSI or ASCII Format

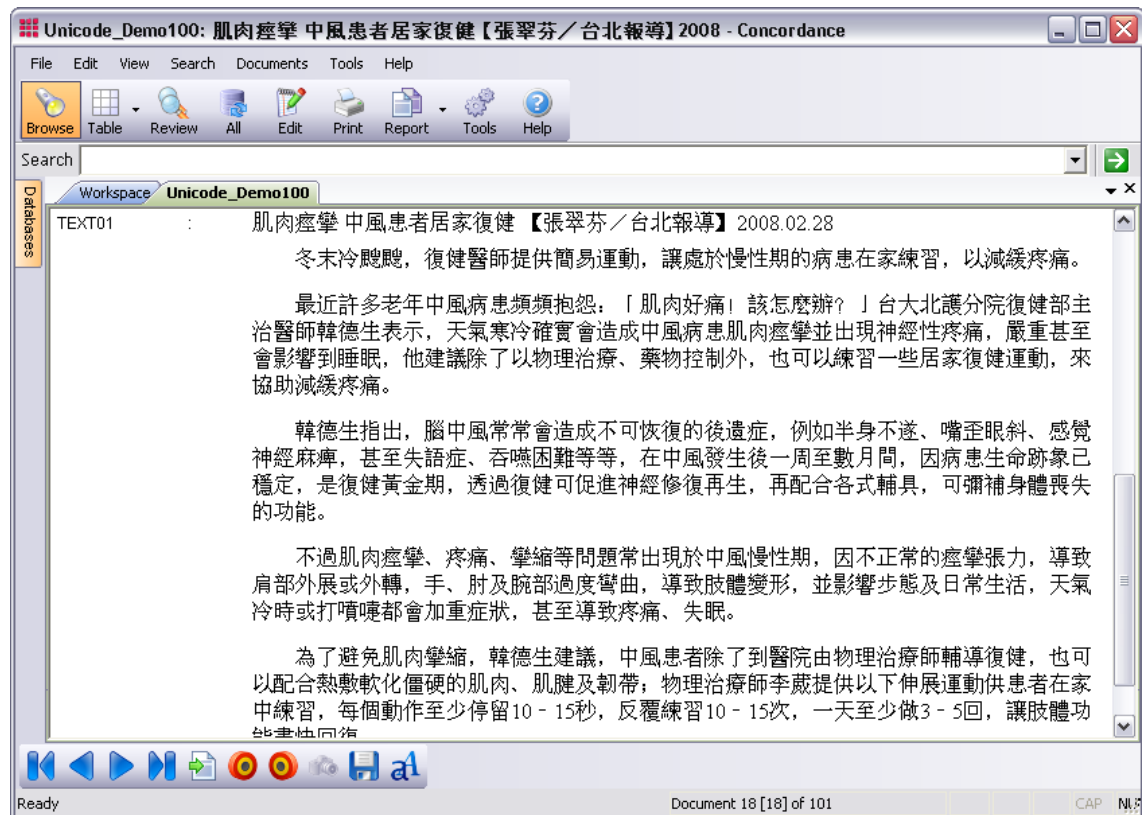
You can export data from Concordance version 10.x to ANSI or ASCII format. The file can then be imported into an application that does not support the Unicode Standard; for example, into Concordance 2007 or earlier versions.

This option is available for delimited text files in the Export Wizard dialog box and the Export Delimited ASCII dialog box. It is also available when exporting database transcripts.

When exporting to ANSI or ASCII format, characters that cannot be represented as a single-byte character will be lost in the export. So exporting documents with double-byte characters, such as Chinese, to ANSI or ASCII format will result in data loss. See the example below.

Example of exporting a document with Chinese characters to ANSI

Here is a document with Chinese characters in Concordance.



If you export this document to a delimited text file and select the Export ANSI (Export Delimited ASCII dialog box) or Export in ANSI format (Export Wizard - Save dialog box) check box, the Chinese characters will be lost. For example, when you open the exported document in WordPad, the Chinese characters are displayed as question marks (?).

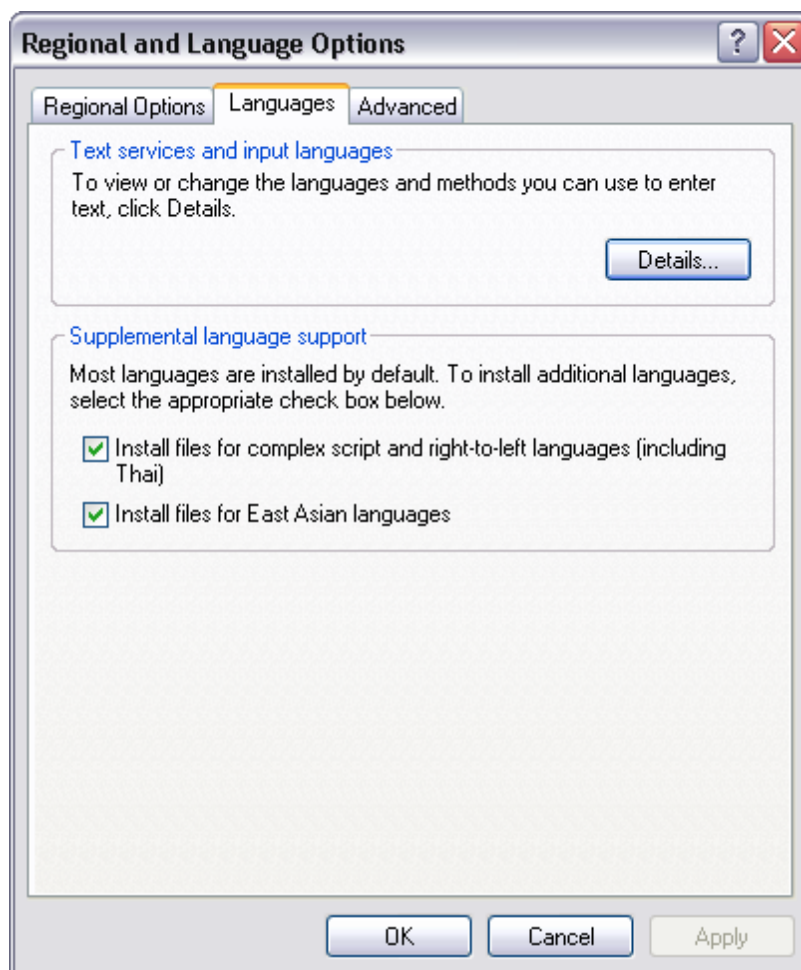
Installing language packs

To display characters in Unicode within Concordance, the appropriate language packs need to be installed on the computer.

To install language packs on a Windows XP operating system:

 You will need access to the I386 directory on the Microsoft Windows XP installation media.

1. Open the Microsoft Windows XP **Control Panel** and double-click **Regional and Language Options**.
2. Click the **Languages** tab.



3. Select the **Install files for complex script and right-to-left languages (including Thai)** and **Install files for East Asian languages** check boxes. Click **OK**.
4. You are prompted to insert the Windows XP CD or copy the files from an alternate location, such as a network server. Click **OK**.

5. Choose one of these options and enter the path to the I386 directory. You may also need to specify the I386 language sub-directory. Click **OK**.
6. Repeat step 5 for the second language pack.
7. Reboot your computer.

 To install language packs on a Windows Vista and Windows 7 operating systems:

Microsoft Windows Vista and Windows 7 operating systems use Language Interface Packs (LIPs). These can be downloaded from the Windows Update Webs site or the installation media. Once you have installed at least one LIP, you can add or remove more LIPs from the Control Panel.

1. In the Control Panel, do one of the following:
 - (Windows Vista) Double-click **Regional and Language Options**.
 - (Windows 7) Click **Change keyboards or other input methods**.
2. Click the **Keyboards and Languages** tab.
3. Under **Display Language**, click **Install/uninstall languages** and follow the prompts.

For more information about installing LIPs, click How can I install additional languages at the bottom of the dialog box or go to the Windows Help and How-to Web page at: <http://windowshelp.microsoft.com/Windows/en-US/Help/35a1b021-d96c-49a5-8d8f-5e9d64ab5ecc1033.mspx>.

Concordance

Administrator's Guide

Reference Information

Chapter

6

Reference Information

Information and Error Messages

Concordance will display a short message in English if it can load the full description. If it can't load the message, Concordance displays the error message number. The Error Messages by Error Codes section lists the error messages by error code number. The Error Messages in Alphabetical Order section lists the error messages in alphabetical order.

Error Messages by Error Codes

E0001 Must open database first.

You have attempted to manipulate a database without first opening one. Use File Open to open the database, then try again.

E0002 Database already exists.

You have specified a database name in Database New that already exists. Enter another name, erase the existing database, or use Database Modify if the document count is zero.

E0003 Database not found.

Concordance was unable to find the database you specified. Concordance automatically adds the file extension .dcb to the name you supplied the Database Open command. No matching file was found.

E0004 Insufficient memory.

Concordance was unable to continue due to a lack of available memory. Install more memory and try again.

E0005 Error retrieving report.

You entered the name of a report to retrieve, but Concordance could not read it. Try loading the report again. If this message is repeated, the report is probably damaged and should be recreated from scratch.

E0006 No previous document.

This is the first document in the current query set.

E0007 Invalid character in field name.

An error encountered in File/New or Modify. You have entered a field name with a space or other invalid character in it. Only alphanumeric and underline characters can be used for field names.

E0008 Duplicate field name.

In Database New or Modify, you have entered a field name that was previously entered. Change the name and continue.

E0010 Error creating file.

Concordance encountered an error creating a file. Check that the specified file name is a valid name. Try again.

E0011 You must select at least one field.

You have attempted to use fields in a command, but no fields were selected for use. Use the Fields option to select a field, then try the operation again.

 E0012 Use Text, Numeric, Date, or Paragraph.

In Database New or Modify, you have specified a field type that does not exist. Valid entries are Date, Text, Numeric, or Paragraph. Correct the entry and try again.

 E0013 Use MMDDYY, YYMMDD or DDMMYY for dates.

Date formats are month-day-year, year-month-day, and day-month-year. Enter them in New or Modify mode by typing the first letter of the type: M, Y, or D respectively.

 E0014 Error saving report.

You entered the name of a report to save, but Concordance could not save it. The disk may be full, write protected, or the directory could be read-only.

 E0015 A paragraph field must be selected.

This error is encountered when using the Documents Import command. It indicates that a free text paragraph field was not selected as the first field with the Fields menu option. Select a paragraph field as field number one and try again.

 E0017 Abandon report

Not handled in the current implementation.

 E0018 Cancel processing

This error is encountered in the following situations:

- Canceling a database conversion, Replication, Pack, Modify, or import overlay process
- Canceling an index (Concordance versions 8 and 9)
- Canceling a sort in Concordance version 8

 E0019 Disk full.

The diskette or fixed disk is full. Split the database between fixed disk drives and notify Concordance with the File menu's Files or Concatenation commands if necessary. You might try erasing or archiving old files.

 E0020 Text file not found.

The system was not able to locate the database text file, file extension .tex. This file contains the text of the database, the contents of the paragraph fields. Check that the file path is correctly set. Use File Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

 E0021 Index file not found.

The system was not able to locate the database index file, file extension .ndx. This file contains the fixed fields. Check that the file path is correctly set. Use File Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

 E0022 Dictionary file not found.

Concordance was unable to locate the database dictionary file, file extension .DCT. If the database has been indexed, ensure that the file's path is correct in the File menu's Files option. You will need to index the database to create the dictionary file the first time. Indexing is a File command.

 E0023 Inverted text file not found.

During normal operation Concordance was unable to access the inverted text file, file extension

.ivt. The system will abandon any operation that required the file. The inverted text file is created during the database indexing process. It is required to search the database or view the database dictionary. If you have not indexed the database, you'll need to do that to continue. Otherwise, check that the file path is correctly set. Use File/Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

☐ **E0024 Error on inverted text file.**

An error was encountered while accessing the database inverted text file, file extension .ivt. This may indicate a full disk or a damaged file. Try reopening the database. If the error continues you may have to index the database again.

☐ **E0025 Error on dictionary file.**

An error was encountered while accessing the database dictionary file, file extension .DCT. This may indicate a full disk or a damaged file. Try reopening the database. If the error continues you may have to index the database again.

☐ **E0026 Error on text file.**

An error was encountered while accessing the database text file, file extension .tex. If the error continues, try restoring a backup copy of the database. If that isn't possible try deleting all of the data from the bad documents and packing the database. If this doesn't work, mark the bad records for deletion and pack. You'll need to index the database again. If the path is incorrect, change it with the File menu's Files option.

☐ **E0027 Error on index file.**

An error was encountered while accessing the database index file, file extension .ndx. If the error continues, either restore a backup copy of the database or unload all documents prior to the problem document, all documents following, and a copy of the database structure. Then reload the database to the new structure, excluding the problem document. You'll need to index the database again.

☐ **E0028 Search overflow.**

Your search located too many occurrences to fit into available disk space. Narrow the scope of your search or erase unneeded files.

☐ **E0029 SYNTAX ERROR: Limiter out of order.**

In Search mode, a search limiter was found out of order. The limiters must follow a word, a mask character, or a right parenthesis. Edit the search and try again.

☐ **E0030 SYNTAX ERROR: Missing right parenthesis.**

In Search mode, the number of parentheses entered was unbalanced, with left parentheses outnumbering right parentheses. Edit your search and try again.

☐ **E0031 SYNTAX ERROR: Missing left parenthesis.**

In Search mode, the number of parentheses entered was unbalanced, with right parentheses outnumbering left parentheses. Edit your search and try again.

☐ **E0032 SYNTAX ERROR: Parenthesis out of order.**

In Search mode a parenthesis was placed in the wrong order. Either a right parenthesis was used to start the query, or a left parenthesis was used to end the query. Edit the query and try again.

☐ **E0033 SYNTAX ERROR: Operand out of order.**

In Search mode, you have entered an operand out of order. Edit your search request and try again.

 E0034 INTERNAL ERROR: Unrecognized query token.

This indicates a Concordance internal error, it may result from a corrupted or user-modified database control file, file extension .dcb. Reset the default query operator with the Tools/Preferences/Searching command and try again. This error should not be encountered under normal circumstances.

 E0035 Search too complex.

In Search mode you have entered a query that was too complex for Concordance to evaluate. Concordance is limited to 50 pairs of parentheses in a single search. Restate your query as two or more searches and try again.

 E0036 This is the last document.

You have reached the last document in the current query set.

 E0037 Dictionary exists, overwrite?

You have attempted to index a database that has already been indexed. If you only want to update the search files, use Reindex. Otherwise select Ok to erase the current dictionary files and force a new index.

 E0039 Zero documents found in search.

Your search located zero documents and you tried to use the resulting occurrence list in a command such as Browse or Sort.

 E0040 No previous queries have been defined.

You have attempted to use a mode or command that operates on queries, but no queries exist. You need to issue a search accessing Review mode, or changing queries in Browse.

 E0041 Database is full.

The database contains the maximum number of documents; none can be added.

 E0042 Help file not found.

You asked for help with function key [F1], but Concordance was unable to find the file concordance_[version #].chm in the default directory or in the directory that Concordance was started from. Ensure that the help file is in the default directory and try again.

 E0043 Error on query file.

A temporary file is created during each Concordance session to store your queries. It is placed in the root directory of the default drive or in the SET TEMP= directory. If the disk becomes full, or the query file is somehow corrupted, Concordance will display this message. Reopening the database will generally solve this problem, though all queries up to this point will be lost. If you are on a network, make sure that the default directory on the default drive has read/write permission.

E0044 Invalid query reference.

 E0045 Unknown or missing formatted field.

An error encountered in fixed field searches. The fixed field was either not specified, or was not defined for the current database. Correct the entry and try again. Use the Field list button while searching to bring up a list of available fields.

E0046 Select operator not recognized.

E0047 Missing select criteria.

 E0049 Search mask operator out of order.

The Search mask operator was found in the wrong place. It can only be placed at the end or beginning of a word; it cannot be used by itself. Edit your search and try again. If you need to search for a word with the mask operator embedded in it, enclose the word in quotes. If you can't find the mask operator in your search, check the Set Wildcard character. It may have been inadvertently changed.

 E0050 Search limiter missing.

In Search mode, your query contains only one of a pair of limiter operators. Edit the query to include the opening or closing limiter, and try again. If your search contains a period or a pair of periods that are not limiters, enclose them in quotes. If you are searching for a decimal number, enclose it in quotes. Concordance is mistaking the decimal point for a limiter operator.

 E0051 Unknown limiter paragraph was specified.

In Search mode, you have specified a limiter paragraph that is not defined in the current database. Only paragraph fields can be specified between the periods. Select the Field list button from the search screen to display a list of available fields.

 E0052 Missing closing quote character.

In Search mode you entered a query with a quote character, but Concordance was unable to find the matching quote. Edit the query to include two quote characters and enter it again. If your query does not contain the quote character, check the Tools/Preferences/Searching dialog box. It may have been inadvertently changed.

 E0053 Wrong version of database.

You have tried to open a Concordance database that was created with a different version of Concordance. You will need to upgrade to the newer version to access this file.

 E0054 File is too large.

During edit mode, you tried to copy a file into a Concordance document. The file was too large for the amount of space left in the document. It cannot be read in.

 E0055 Error opening database.

An error was encountered opening the database. Perhaps an invalid database was specified, or Concordance ran into a problem reading in the database file. Try to open the database again.

 E0056 Error accessing temporary query file.

Each query session is stored in a temporary file. Concordance creates this file in the default directory of the default drive, or in the SET TEMP= directory. An error was encountered while creating, reading, or writing this file. This may indicate a full disk or a write-protected disk. The results of the query that caused this error message are not reliable. Check the amount of free space on the default disk drive.

 E0057 Database access is read only.

The operating system has only allowed Concordance to open the database in read only mode. Any commands that modify the database, such as Edit, Load, or Modify are disallowed.

E0058 Error opening cut & paste buffer.

 E0059 Erase dictionary and abort?

This message is displayed when you have begun packing the database but pressed the [Esc] key before the process has completed. Concordance has already deleted marked documents from the database and is now adjusting the dictionary files. Answering Yes will cancel the remainder of the

Pack, and erase the dictionary files. You will need to Index the database to restore them. Pressing any other key will allow Concordance to finish the Pack without erasing the dictionary.

❏ **E0060 New compression method, can't decompress.**

The database was stored with a version of Concordance that used a compression method that is not supported by this version. You need to use the other version, or load the unloaded data.

❏ **E0061 Database is in use by other users.**

Another network user had the database open and you tried to access a function that needed to obtain exclusive use, such as Modify. Ask the other network users to logoff and try again. This can also happen if you run a network version of Concordance on a standalone machine, or if the DOS share program has not been loaded.

❏ **E0062 Spell check word list not found.**

Cannot find the WORDS.LST file. Please make sure that the WORDS.LST file is located in the Concordance installation directory.

❏ **E0063 Can't open database spell check list.**

Concordance is unable to open the WORDS.LST file. It may be corrupt.

❏ **E0064 Synonym list is cross-linked.**

Synonym searching has retrieved a related word that looks-up the original word, causing it to retrieve the related word again, causing it to look-up the original word again... This may involve a large convoluted circle of words. Fix it in the source synonym text and rebuild the thesaurus.

❏ **E0065 Synonym nesting is too deep.**

Concordance has expanded the synonym, which caused further expansion of the retrieved synonyms. Too many expansions took place. Edit the source synonym text and rebuild the thesaurus.

❏ **E0066 Incompatible concatenated databases.**

You have concatenated databases with differing database structures. The operation you attempted, such as Overlay or Unload, requires exact structures. Unconcatenate the databases or modify the structures, then try again.

❏ **E0067 Too many concatenated databases.**

Concordance can only join 128 databases in a concatenation.

❏ **E0068 Key file out of synch! Rebuild?**

The key file, primarily used to speed fixed field searches, does not contain the same number of entries as the database. This can happen if a user does not exit Edit or Append mode properly, i.e. [Ctrl-Alt-Del] or a power failure. Answer Yes and Concordance will recreate the file. If you answer No, the file is erased.

❏ **E0069 Can't rename/erase temporary files.**

The temporary files created during a database modify or pack could not be erased and/or renamed. This is caused by insufficient network access rights. Ask your network administrator to either give you erase and rename rights to the database directory, or remove Modify, Pack, and Reindex from your menu.

❏ **E0071 Your field read/write privileges are insufficient for this.**

Your database administrator has given you security rights that do not allow you to perform the current function.

 E0080 The Connection to the FYI Server could not be completed

This is caused by the Incompatibility of older versions of Concordance when trying to open a registered .FYI file created in Concordance version 10.

 E0101 Missing /*, or } statement.

The current statement is missing a /*, or } and cannot be resolved.

 E0102 A (or [is missing from the statement.

The current statement is missing a (or [and cannot be resolved.

 E0103 A) or] is missing from the statement.

The current statement is missing a) or] and cannot be resolved.

E0104 Array index out of range.

E0105 Illegal conversion of a variable or array.

 E0106 Insufficient memory.

Concordance was unable to continue due to a lack of available memory. Install more memory and try again.

E0107 Syntax error.

E0108 Assignment to NULL pointer.

 E0109 Unknown field.

The field information you have specified is incorrect or does not exist.

E0110 Need a left-side-value, can't make the assignment.

E0111 Stack underflow.

E0112 Stack overflow.

E0113 Insufficient memory for another function.

E0114 Insufficient memory for another variable.

E0115 Initialization error.

E0116 Wrong number of arguments for this function.

 E0117 A { is missing from the statement.

The current statement is missing a { and cannot be resolved.

E0118 Illegal assignment with an unsubscripted array.

E0119 A colon is missing from the case/conditional statement.

E0120 Floating point error.

E0121 Unknown function or variable, declare it before using it.

E0122 A semicolon is missing.

E0123 Wrong number of parameters in function call.

E0124 Program stopped.

E0125 Missing */ to end the commented section.

 E0126 Database isn't open.

You must have a database open to perform the current function.

E0127 Carriage return in quoted string, end quote is missing.

E0129 Found an operand without a preceding operator, semicolon may be missing.

E0130 Found two operands without an operator between them.

 E0131 Missing the closing quote in a quoted string.

In Search mode you entered a query with a quote character, but Concordance was unable to find the matching quote. Edit the query to include two quote characters and enter it again. If your query does not contain the quote character, check the Tools/Preferences/Searching dialog box. It may have been inadvertently changed.

E0132 A matching } is missing from the { statement.

E0133 You can only concatenate string values.

E0134 Division by zero.

E0135 Mod by zero.

 E0136 Wrong version of program.

You have the wrong version of the application to run the current function.

E0137 Function requires a different parameter type.

E0138 run() can't find the function to execute.

E0139 run() can't find the program file to load.

 Concordance Messages in Alphabetical Order

 A

 A { is missing from the statement

The current statement is missing a { and cannot be resolved.

 A (or [is missing from the statement

The current statement is missing a (or [and cannot be resolved.

 A) or] is missing from the statement

The current statement is missing a) or] and cannot be resolved.

 A paragraph field must be selected

This error is encountered when using the Documents Import command. It indicates that a free text paragraph field was not selected as the first field with the Fields menu option. Select a paragraph field as field number one and try again.

 C

 Can't open database spell check list

Concordance is unable to open the WORDS.LST file. It may be corrupt.

 Can't rename/erase temporary files

The temporary files created during a database modify or pack could not be erased and/or renamed. This is caused by insufficient network access rights. Ask your network administrator to either give you erase and rename rights to the database directory, or remove Modify, Pack, and Reindex from your menu.

 D

 Database already exists

You have specified a database name in Database New that already exists. Enter another name, erase the existing database, or use Database Modify if the document count is zero.

 Database access is read only

The operating system has only allowed Concordance to open the database in read only mode. Any commands that modify the database, such as Edit, Load, or Modify are disallowed.

 Database is full

The database contains the maximum number of documents; none can be added.

 Database isn't open

You must have a database open to perform the current function.

 Database is in use by other users

Another network user had the database open and you tried to access a function that needed to obtain exclusive use, such as Modify. Ask the other network users to logoff and try again. This can also happen if you run a network version of Concordance on a standalone machine, or if the DOS share program has not been loaded.

 Database not found

Concordance was unable to find the database you specified. Concordance automatically adds the file extension .dcb to the name you supplied the Database Open command. No matching file was found.

 Dictionary exists, overwrite?

You have attempted to index a database that has already been indexed. If you only want to update the search files, use Reindex. Otherwise select Ok to erase the current dictionary files and force a new index.

 Dictionary file not found

Concordance was unable to locate the database dictionary file, file extension .DCT. If the database has been indexed, ensure that the file's path is correct in the File menu's Files option. You will need to index the database to create the dictionary file the first time. Indexing is a File command.

 Disk full

The diskette or fixed disk is full. Split the database between fixed disk drives and notify Concordance with the File menu's Files or Concatenation commands if necessary. You might try erasing or archiving old files.

 Duplicate field name

In Database New or Modify, you have entered a field name that was previously entered. Change the name and continue.

 E **Erase dictionary and abort?**

This message is displayed when you have begun packing the database but pressed the [Esc] key before the process has completed. Concordance has already deleted marked documents from the database and is now adjusting the dictionary files. Answering Yes will cancel the remainder of the Pack, and erase the dictionary files. You will need to Index the database to restore them. Pressing any other key will allow Concordance to finish the Pack without erasing the dictionary.

 Error accessing temporary query file

Each query session is stored in a temporary file. Concordance creates this file in the default directory of the default drive, or in the SET TEMP= directory. An error was encountered while creating, reading, or writing this file. This may indicate a full disk or a write-protected disk. The results of the query that caused this error message are not reliable. Check the amount of free space on the default disk drive.

 Error creating file

Concordance encountered an error creating a file. Check that the specified file name is a valid name. Try again.

 Error on dictionary file

An error was encountered while accessing the database dictionary file, file extension .DCT. This may indicate a full disk or a damaged file. Try reopening the database. If the error continues you may have to index the database again.

 Error on index file

An error was encountered while accessing the database index file, file extension .ndx. If the error continues, either restore a backup copy of the database or unload all documents prior to the problem document, all documents following, and a copy of the database structure. Then reload the database to the new structure, excluding the problem document. You'll need to index the database again.

 Error on inverted text file

An error was encountered while accessing the database inverted text file, file extension .ivt. This may indicate a full disk or a damaged file. Try reopening the database. If the error continues you may have to index the database again.

 Error on query file

A temporary file is created during each Concordance session to store your queries. It is placed in the root directory of the default drive or in the SET TEMP= directory. If the disk becomes full, or the query file is somehow corrupted, Concordance will display this message. Reopening the database will generally solve this problem, though all queries up to this point will be lost. If you are on a network, make sure that the default directory on the default drive has read/write permission.

 Error on text file

An error was encountered while accessing the database text file, file extension .tex. If the error continues, try restoring a backup copy of the database. If that isn't possible try deleting all of the data from the bad documents and packing the database. If this doesn't work, mark the bad records for deletion and pack. You'll need to index the database again. If the path is incorrect, change it with the File menu's Files option.

 Error opening database

An error was encountered opening the database. Perhaps an invalid database was specified, or Concordance ran into a problem reading in the database file. Try to open the database again.

 Error retrieving report

You entered the name of a report to retrieve, but Concordance could not read it. Try loading the report again. If this message is repeated, the report is probably damaged and should be recreated from scratch.

 Error saving report

You entered the name of a report to save, but Concordance could not save it. The disk may be full, write protected, or the directory could be read-only.

 F **File is too large**

During edit mode, you tried to copy a file into a Concordance document. The file was too large for the amount of space left in the document. It cannot be read in.

 H **Help file not found**

You asked for help with function key [F1], but Concordance was unable to find the file concordance_[version #].chm in the default directory or in the directory that Concordance was started from. Ensure that the help file is in the default directory and try again.

 I **Incompatible concatenated databases**

You have concatenated databases with differing database structures. The operation you attempted, such as Overlay or Unload, requires exact structures. Unconcatenate the databases or modify the structures, then try again.

 Index file not found

The system was not able to locate the database index file, file extension .ndx. This file contains

the fixed fields. Check that the file path is correctly set. Use File Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

■ **Insufficient memory**

Concordance was unable to continue due to a lack of available memory. Install more memory and try again.

■ **INTERNAL ERROR: Unrecognized query token**

This indicates a Concordance internal error, it may result from a corrupted or user-modified database control file, file extension .dcb. Reset the default query operator with the Tools/Preferences/Searching command and try again. This error should not be encountered under normal circumstances.

■ **Invalid character in field name**

An error encountered in File/New or Modify. You have entered a field name with a space or other invalid character in it. Only alphanumeric and underline characters can be used for field names.

■ **Inverted text file not found**

During normal operation Concordance was unable to access the inverted text file, file extension .ivt. The system will abandon any operation that required the file. The inverted text file is created during the database indexing process. It is required to search the database or view the database dictionary. If you have not indexed the database, you'll need to do that to continue. Otherwise, check that the file path is correctly set. Use File/Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

■ **K**

■ **Key file out of synch! Rebuild?**

The key file, primarily used to speed fixed field searches, does not contain the same number of entries as the database. This can happen if a user does not exit Edit or Append mode properly, i.e. [Ctrl-Alt-Del] or a power failure. Answer Yes and Concordance will recreate the file. If you answer No, the file is erased.

■ **M**

■ **Missing closing quote character**

In Search mode you entered a query with a quote character, but Concordance was unable to find the matching quote. Edit the query to include two quote characters and enter it again. If your query does not contain the quote character, check the Tools/Preferences/Searching dialog box. It may have been inadvertently changed.

■ **Missing /*, or } statement**

The current statement is missing a /*, or } and cannot be resolved.

■ **Must open database first**

You have attempted to manipulate a database without first opening one. Use File Open to open the database, then try again.

■ **N**

 New compression method, can't decompress

The database was stored with a version of Concordance that used a compression method that is not supported by this version. You need to use the other version, or load the unloaded data.

 No previous document

This is the first document in the current query set.

 No previous queries have been defined

You have attempted to use a mode or command that operates on queries, but no queries exist. You need to issue a search accessing Review mode, or changing queries in Browse.

 S **Search limiter missing**

In Search mode, your query contains only one of a pair of limiter operators. Edit the query to include the opening or closing limiter, and try again. If your search contains a period or a pair of periods that are not limiters, enclose them in quotes. If you are searching for a decimal number, enclose it in quotes. Concordance is mistaking the decimal point for a limiter operator.

 Search mask operator out of order

The Search mask operator was found in the wrong place. It can only be placed at the end or beginning of a word; it cannot be used by itself. Edit your search and try again. If you need to search for a word with the mask operator embedded in it, enclose the word in quotes. If you can't find the mask operator in your search, check the Set Wildcard character. It may have been inadvertently changed.

 Search overflow

Your search located too many occurrences to fit into available disk space. Narrow the scope of your search or erase unneeded files.

 Search too complex

In Search mode you have entered a query that was too complex for Concordance to evaluate. Concordance is limited to 50 pairs of parentheses in a single search. Restate your query as two or more searches and try again.

 Spell check word list not found

Cannot find the WORDS.LST file. Please make sure that the WORDS.LST file is located in the Concordance installation directory.

 Synonym list is cross-linked

Synonym searching has retrieved a related word that looks-up the original word, causing it to retrieve the related word again, causing it to look-up the original word again... This may involve a large convoluted circle of words. Fix it in the source synonym text and rebuild the thesaurus.

 Synonym nesting is too deep

Concordance has expanded the synonym, which caused further expansion of the retrieved synonyms. Too many expansions took place. Edit the source synonym text and rebuild the thesaurus.

 SYNTAX ERROR: Limiter out of order

In Search mode, a search limiter was found out of order. The limiters must follow a word, a

mask character, or a right parenthesis. Edit the search and try again.

 SYNTAX ERROR: Missing left parenthesis

In Search mode, the number of parentheses entered was unbalanced, with right parentheses outnumbering left parentheses. Edit your search and try again.

 SYNTAX ERROR: Missing right parenthesis

In Search mode, the number of parentheses entered was unbalanced, with left parentheses outnumbering right parentheses. Edit your search and try again.

 SYNTAX ERROR: Operand out of order

In Search mode, you have entered an operand out of order. Edit your search request and try again.

 SYNTAX ERROR: Parenthesis out of order

In Search mode a parenthesis was placed in the wrong order. Either a right parenthesis was used to start the query, or a left parenthesis was used to end the query. Edit the query and try again.

 System fields improper field rights

Performing the drag-and-drop operation for a database that contains a system field produces a warning that the field does not have the proper field right settings for the action to be performed. To fix this issue, do the following:

1. From the File menu, click Modify.
1. Locate and select the system field, clear the System check box, and then click OK.
2. Perform the drag-and-drop operation for the files you want to add.
3. When finished, from the File menu, click Modify.
4. Locate and select the System field, click the System check box, and then click OK.

 T

 Text file not found

The system was not able to locate the database text file, file extension .tex. This file contains the text of the database, the contents of the paragraph fields. Check that the file path is correctly set. Use File Status to display all file paths. If the path is incorrect, change it with the File menu's Files option.

 This is the last document

You have reached the last document in the current query set.

 Too many concatenated databases

Concordance can only join 128 databases in a concatenation.

 U

 Unknown field

The field information you have specified is incorrect or does not exist.

 Unknown limiter paragraph was specified

In Search mode, you have specified a limiter paragraph that is not defined in the current database. Only paragraph fields can be specified between the periods. Select the Field list button from the search screen to display a list of available fields.

 Unknown or missing formatted field

An error encountered in fixed field searches. The fixed field was either not specified, or was not defined for the current database. Correct the entry and try again. Use the Field list button while searching to bring up a list of available fields.

 Use MMDDYY, YYMMDD, or DDMMYY for dates

Date formats are month-day-year, year-month-day, and day-month-year. Enter them in New or Modify mode by typing the first letter of the type: M, Y, or D respectively.

 Use Text, Numeric, Date, or Paragraph

In Database New or Modify, you have specified a field type that does not exist. Valid entries are Date, Text, Numeric, or Paragraph. Correct the entry and try again.

 W **Wrong version of database**

You have tried to open a Concordance database that was created with a different version of Concordance. You will need to upgrade to the newer version to access this file.

 Wrong version of program

You have the wrong version of the application to run the current function.

 Y **You must select at least one field**

You have attempted to use fields in a command, but no fields were selected for use. Use the Fields option to select a field, then try the operation again.

 Your field read/write privileges are insufficient for this

Your database administrator has given you security rights that do not allow you to perform the current function.

 Z **Zero documents found in search**

Your search located zero documents and you tried to use the resulting occurrence list in a command such as Browse or Sort.

Keyboard shortcuts

Use the following keyboard shortcuts to perform Concordance and Concordance Image functions from a specific view or task pane. The behavior of the keyboard shortcuts depends on the view or task pane selected. make sure that the view or task pane you want to work with is selected before using the keyboard shortcuts.

Concordance

Browse and Table View

Keyboard Shortcuts: Browse and Table Views	
Shortcut Keys	Use
F1	Open Concordance Help.
F2	Open Search task pane.
F3	Open or close the Review View.
F4	Open the Query by Example dialog box to run a form search.
F5	Open or close the Table View in the Browse View.
F6	Open or close the Browse View in the Table View.
F8	Open the Sort task pane.
-	Navigate to the previous document.
+	Navigate to the next document.
C	Open the Copy dialog box to copy document data. (Browse View only)
D	Open the Goto dialog box to navigate to a specific document.
F	Navigate to the first document.
G	Open the Goto dialog box to navigate to a specific document.
L	Navigate to the last document.
N	Navigate to the next search hit.
O	Open the Font dialog box to view or modify the font.

Keyboard Shortcuts: Browse and Table Views

Shortcut Keys	Use
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.
L	Navigate to the last document.
N	Navigate to the next search hit.

Keyboard Shortcuts: Tags Task Pane

Shortcut Keys	Use
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

Keyboard Shortcuts: Concordance Native 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 Image

Keyboard Shortcuts: Concordance Image

Shortcut Keys	Use
CTRL+O	Opens the Open dialog box to open an image in the viewer.
CTRL+B	Turn on or off the Toggle Bar Code Mode function.
CTRL+R	Toggle the display of the redlines on the image.
CTRL+P	Open the Print dialog box to print the images.

Keyboard Shortcuts: Concordance Image	
Shortcut Keys	Use
CTRL+C	Copy the current selection on the image.
CTRL+X	Cut the current selection on the image.
CTRL+V	Paste the cut or copied selection.
I	Invert image color. (only works with black and white images)
CTRL+	Zoom in a little.
CTRL-	Zoom out a little.
+	Zoom in 50%.
-	Zoom out 50%.
ALT+Z	Zoom on selection.
W	Fit image to width.
H	Fit image to height.
CTRL+F	Display the full screen.
<	Rotate left from the original orientation.
>	Rotate right from the original orientation.
/	Flip from the original orientation.
LEFT ARROW	Rotate left from the current orientation.
RIGHT ARROW	Rotate right from the current orientation.
DOWN ARROW	Flip from the current orientation.
CTRL+HOME	Navigate to the first page.
PAGE DOWN	Navigate to the next page.
PAGE UP	Navigate to the previous page.
CTRL+END	Navigate to the last page.
G	Open the Go to page dialog box to navigate to a specific page.

Keyboard Shortcuts: Concordance Image

Shortcut Keys	Use
CRTL+G	Open the Go to image key dialog box to navigate to a specific image.
CRTL+PAGE DOWN	Navigate to the next document.
CRTL+PAGE UP	Navigate to the previous document.

FYI Reviewer

General

Keyboard Shortcuts: General FYI Reviewer

Shortcut Keys	Use
CRTL+O	Open the Font dialog box to view or modify the font.
CRTL+B	Open the Microsoft Internet Explorer Organize Favorites dialog box.
CRTL+R	Return to the FYI Reviewer login page.
CRTL+P	Open the Print dialog.
CRTL+H	Open the Microsoft Internet Explorer History tab.
I	Invert image color.
+	Zoom image in 50%.
-	Zoom image out 50%.
W	Fit image to width.
H	Fit image to height.
LEFT ARROW	Rotate image left from the current orientation.
RIGHT ARROW	Rotate image right from the current orientation.
CRTL+HOME	Navigate to first page.

Keyboard Shortcuts: General FYI Reviewer

Shortcut Keys	Use
CTRL+END	Navigate to last page.
G	Open the Go to dialog box to navigate to a specific page.
CTRL+PAGE DOWN	Navigate to next document.
CTRL+PAGE UP	Navigate to previous document.

Search View

Keyboard Shortcuts: Search 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.

Browse and Table View

Keyboard Shortcuts: Browse and Table Views

Shortcut Keys	Use
F5	Open or close the Table View in the Browse View.
F6	Open or close the Browse View in the Table View.
F	Navigate to the first document.
-	Navigate to the previous document.

Keyboard Shortcuts: Browse and Table Views

Shortcut Keys	Use
+	Navigate to the next document.
L	Navigate to the last document.
G	Open the Go to dialog box to navigate to a specific page.
P	Navigate to previous hit.
N	Navigate to next hit.
V	Open and close the image associated with the current document.
C	Open the Copy dialog box for copying field data. (Browse View only)
O	Open the Font dialog box to view or modify the font.
DOWN ARROW	Navigate to the next document. (Table View only)

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.
SHIFT+TAB	Navigate to the previous field.
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.

Keyboard Shortcuts: Edit View	
Shortcut Keys	Use
CTRL+H	Open the Replace dialog box to find and replace text in the current field.
CTRL+L	Open the Open dialog box to locate an authority list (.LST) file.
CTRL+V	Paste the copied or cut text.
CTRL+X	Cut the selected text.
CTRL+Z	Undo the last action.

Concordance

Administrator's Guide

Glossary

Chapter

7

Glossary

A - E (ActiveX - Exploded Sort Report)

ActiveX

FYI Reviewer is an ActiveX plug-in designed for Microsoft Internet Explorer which provides Web access to Concordance databases.

Bates Numbering

Documents in litigation collections are assigned a unique sequential number on each page of every document. These numbers are referred to as Bates numbers (named after the Bates automatic numbering machine) and are used to identify a document or page. In Concordance, these numbers are often referred to as as BEGNO (beginning number) and ENDNO (ending number).

Boolean operator

Use Boolean operators such as AND, NOT, OR, and XOR to include or exclude documents by comparing them against conditions. A search for milk OR coffee locates all documents that either contain the word "milk" or "coffee".

Browse View

A Concordance screen used to view the current database record in the current query, or the first document in the database if there is no query.

Client

An FYI Admin Console menu tree designation on the Management tab, depicted by a folder icon. Client folders are not required but can be used to organize data by a client, case name, or topic. Matters are then added to these client folders.

Concatenation

Combining one or more databases together so that they can be searched as one single database.

If you are using FYI, all databases that are concatenated through a .cat file must be registered in the FYI Admin Console. Concatenation in FYI Reviewer is achieved through checking multiple databases in the list then clicking the Open button.

Concordance Native Viewer (CNV)

Near-native document viewer for use with Concordance.

Concordance Programming Language (CPL)

A proprietary programming language used to open, query, and modify databases for Concordance.

 Context Operator

Context operators SAME, NOTSAME, and field limiters are used to locate records that include or exclude combinations of keywords within a specific paragraph field.

 Database

An organized body of related information.

 Delimited file

A digital file that has a text qualifier, a delimiter, and a line separator to structure data uniformly.

 Deponent

A person who testifies under oath, especially in writing.

 Deposition

The memorialized minutes of an interview between a member of the legal profession and a litigant or witness.

 Dictionary

A file created when a database is indexed, which facilitates searches. A database dictionary file contains a list of all words, other than stopwords, that are found in a database. Each word in the dictionary displays with the total number of occurrences and the number of documents it appears in.

 Document

In Concordance, a document record is a record associated with a logical combination of pages. With paper, this term refers to collections of pages. With electronic files, this term refers to a digital file.

 Edit View

A screen in Concordance that's used to edit the contents of a the current database record, or to enter a new record into the document collection. Records viewed in Edit mode are retrieved from the last or current query.

 Electronic Data Discovery (EDD) or E-Discovery

The process of collecting electronic files.

 Exploded Sort Report

A report where each entry in a multiple entry field is sorted in alphabetical order and given its own line in the report as if it were a separate record.

 F - J (Field Limiter - Issue) **Field Limiter**

Field limiters are used to include or exclude field names, and are considered to be context operators. The use of a single period between the search term and the field name includes a field. The use of two periods between the search term and the field name excludes a field.

 Fuzzy words

Words that are like homonyms, that *look like* and *sound like* a word contained in the database dictionary. This list is unique to each database and is built during indexing.

 FYI Admin Console

Allows an administrator to publish databases, restrict access and change security settings, set performance parameters, and generate usage reports for FYI.

 FYI Administration Console Server

Works with the FYI Admin Console to control FYI Server.

 FYI Server

Sends data to Concordance and Concordance Image or Opticon clients.

 Hard Kill

If you are administrating FYI and need to end a user session, a hard kill immediately disconnects users from FYI Reviewer and does not guarantee that files will be closed or session data saved, therefore users risk losing data. Some files may be left open creating file access contention problems. It is best practice to run a soft kill before running a hard kill.

 Hits

Keywords used to locate document records, returning the count of words *hits* located in the active query. Hits are highlighted in red (default color) in records displaying in Browse View.

 Imagebase

Just as a collection of Concordance files defines a database, scanned image files are stored together to form an imagebase, which includes the names and locations of the image files.

 Image key

A field attribute. Fields in Concordance are coded to link with files in Concordance Image, providing lookup information about where the associated image is located.

 Image viewer

Concordance Image is a tool used to view images associated with a document record. Image files are stored in a separate imagebase (database).

 Index

When used as a verb, *to index a database*, this term refers to the process in which Concordance builds files that integrate with the program and that facilitate searches. When used as a noun, *the database's index*, it refers to the files that are created. It's also a field attribute. Fields that are designated as indexed fields have their contents scanned and added to the files that Concordance Creates to facilitate searches.

 Issue

A tag that's used to categorize a section of text within a document.

 K - O (Key - Orphan)

 Key

A field attribute. Key fields have their contents scanned and added to special key files that integrate with Concordance and that facilitate searches on the field.

 Keywords in Context (KWIC)

A custom report option that makes otherwise lengthy reports more manageable and concise by displaying just those sections of indexed fields that contain selected keywords, used especially for transcripts and depositions.

 Matter

An FYI Admin Console menu tree designation on the Management tab, depicted by a briefcase icon. Matters are used to organize databases by case or topic. Databases for FYI Reviewer must be associated with a matter in order for them to be viewable online in FYI Reviewer.

 Masking

The use of a wildcard character to locate patterns of keywords.

 Media key

A field attribute. Fields in Concordance are coded to link with files in Concordance Native Viewer, providing lookup information about where the associated document or image is located.

 Metadata

Properties associated with a document that might or might not be contained within the body of the document, including the author, the creation date, and last modified date. Concordance also captures formatting metadata for font changes, bolding, underlining, and highlighting.

 Multi-page TIFF

A specific type of Tagged Image File Format (TIFF) image file in which many pages are combined into a single .tif file.

 Native application

The software used to activate, run, or otherwise view a digital file.

 Non-persistent tag

A tag that's deleted unless it's applied to at least one database record, or at least one section of text in Browse View.

 Notes

Subjective comments created by a reviewer and assigned to a selection of text within a document.

 Operator

A reserved word or symbol that Concordance interprets to be part of search query syntax.

 Optical Character Recognition (OCR)

An electronic process where the text in paper documents or digital files is extracted and prepared for eventual loading into a full-text information retrieval system.

 Orphan

One sentence or line of text from a previous paragraph that prints at the top of page due to document page breaks and setup options. Selecting print settings for widow/orphan

controls indicates how many lines are printed when a paragraph or text content overlaps a page break in a document. Typically a minimum of two lines of text should be continued after a page break to keep paragraph or text content within context. See also: Widows.

P - T (Pack - Transcript)

Pack

The act of removing records or redlines from a database that have been marked for deletion. Packing a dictionary file removes references to textual units identified by indexing or reindexing that are no longer in the database, while optimizing the file structure for faster searches and reindexes.

Persistent Tag

A tag that exists between sessions, even if it hasn't been applied to any database record, or any section of text in Browse View.

Production

A process where you "produce" a copy of your images based on a current Concordance query, which can be renamed and renumbered to fit your needs. Productions are often run for internal case review and to provide opposing counsel with records in preparation for trial.

Proximity Operator

The proximity operators ADJ and NEAR are used to locate words within a specified distance from each other in the same field. These operators can use optional numerical arguments. The search Apples ADJ25 Oranges locates documents where "oranges" appears within 25 words of "apples".

Q & A pair

Used in transcript or deposition, a coupling of a question posed to an individual, and his or her reply.

Query

A request for information from a database using parameters, field values, and language.

Records

Individual objects in a full-text information retrieval system, which are primarily documents within a Concordance database.

Redaction

A blocked section of text intended to prevent others from viewing sensitive information in a document.

 Redlines

Subjective text, notes, or symbols placed on a graphical image by a reviewer, which represent subjective information about the image.

 Reindex

A procedure that's functionally similar to indexing. Reindexing updates the files created during a database's initial indexing, and is required when data changes in a database through reviewer input, or when database records are added, imported or updated.

 Relational operator

Relational operators, such as less than (LT) and greater than (GT), can be used to test data against specific values.

 Replication

A process that copies a Concordance database, creating a replica that contains any changes (edits, deletions, additions, tagging). Replica databases can be published to any network site. Only changes are replicated. Concordance synchronizes replica database changes from mobile connections or third-party vendor databases with a primary database. Only fields that have changes are updated with local edits, and managed on a field-by field basis.

 Scanning

An automated process that converts paper or electronic documents into a Concordance-ready format.

 Single-page TIFF

A specific type of Tagged Image File Format (TIFF) image file in which many individual pages are separated into individual files. For example, a 40-page document could be represented as 40 individual .tif files.

 Snapshot

A snapshot is a point-in-time image of your query session, providing a static picture of a database that includes all concatenated databases, all searches, the current record, and the current sort in effect.

 Soft Kill

If you are administrating FYI and need to end a user session, a soft kill sends a message to the server requesting it to close all files, save data, and end the user's session.

However, it does not save data currently being edited by the client. It is best practice to run a soft kill before running a hard kill.

 Spoliate

To damage or ruin the original native document files by covering or cutting content.

 Stopwords

Words that are so common that they are of no value in the intent of a search, such as *and*, *for*, and *the*. The more stopwords included in a list increases the indexing process and speeds data retrieval.

 Synchronization

In Concordance, synchronization is a process that copies any changes between replicated databases, with changes managed on a field-by-field basis. Concordance has options for a read-only publishing, a review scenario, or full replication and synchronization.

In the FYI Admin Console, synchronization contacts all registered databases and updates any user changes made in Concordance security.

 Table View

A screen in Concordance that's used to view several database records in a tabular format, similar to a spreadsheet, displaying one line per record.

 Tag

A descriptive marker in Concordance that can be used to categorize a document or a section of text within a document (issues) in Browse or Table Views.

 Tally

A method of counting the number of unique values that appear in a field across all records in a query, while tabulating document and data classifications.

 Template

A preformed database shell that can be used to build a database quickly. Templates contain no records, but have predefined field names, and other field attributes.

 Transcript

The memorialized minutes of a legal proceeding.

 U - Z (Vendor - Zero Query)

 Vendor

A third-party corporate entity that specializes in processing and converting paper and electronic documents into a Concordance-ready format.

 Widow

One sentence or line of text that starts a paragraph at the bottom of a document page with the remaining text printing at the top the next page due to page breaks and document setup options. Selecting print settings for widow/orphan controls indicates how many lines are printed when a paragraph or text content overlaps a page break in a document. Typically a minimum of two lines of text should be included before a page break to keep paragraph or text content within context. See also: Orphans.

 Wildcard character

One of two characters used in pattern matching. The ? character is used to mask single characters. The search WOM?N locates Women and Woman. The * character is used to mask the remainder of a word. The search MIL* locates any word where the first three letters are MIL.

 Zap

An action that deletes all records from the current database, erasing all associated database files except for the stopword file. All search files are erased, adding free space to the system. Only the primary database is zapped when databases are concatenated.

 Zero Query

A special search number that is predefined to include all records in the database, and resorts them in their original load order.

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