



CONCORDANCE POC

A QUICK POC GUIDE FOR CONCORDANCE

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Welcome

Welcome to CloudNine Concordance, our on-premise review platform. This proof of concept (POC) guide is designed to walk you through a basic Concordance Workflow with a Load File import. This document serves as a simple introduction to both Concordance and Concordance Viewer. For more detailed information, please visit the CloudNine Concordance Answer Center.

Concordance Pre-Requisites

- Concordance is installed with Concordance Viewer.
- License is active.

Sample Data

Please download the sample load file dataset <https://kb.cloudnine.com/concordance-sample-dataset>. This dataset was processed in LAW and includes Load Files, Images, Natives, and Text files. This sample data is used to complete the activities in this document.

Concordance Basic Workflow Sample



Concordance Basic Workflow Sample Load File Data



Preparing the Sample Data

Organization is key when it comes to managing your Concordance Databases! Keeping your data neatly arranged is important whether you're working from a local drive or a shared network.

Activity: Create Concordance Folder Structure / Extract POC Sample Data Set

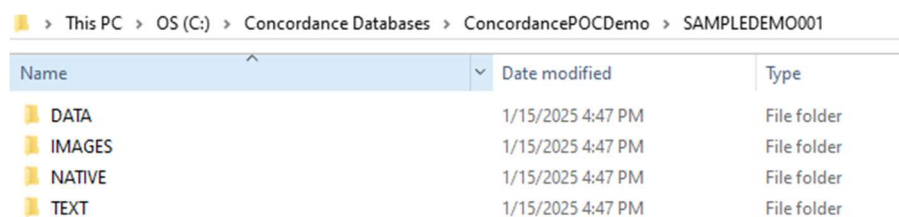
In this activity, you will create a folder structure on your local drive for the Concordance Database. To ensure a successful experience with this proof of concept (POC) and avoid the need for load file manipulation, it is crucial to follow the steps below, including the specified folder structure and naming conventions.

1. On your local drive, create a folder named **Concordance Databases**. The folder path should be **C:\Concordance Databases**.
2. Open the **Concordance Databases** folder and create a subfolder, **ConcordancePOCDemo** this folder will store your Concordance database and supporting files.
3. If you haven't already, download the **POCdata.zip** file <https://kb.cloudnine.com/concordance-sample-dataset>.
4. Extract the POCdata.zip file to the **Concordance Databases/ConcordancePOCDemo** folder.

Results

Your results should have a folder structure of

C:\Concordance Databases\ConcordancePOCDemo\POCData\SampleDemo001.



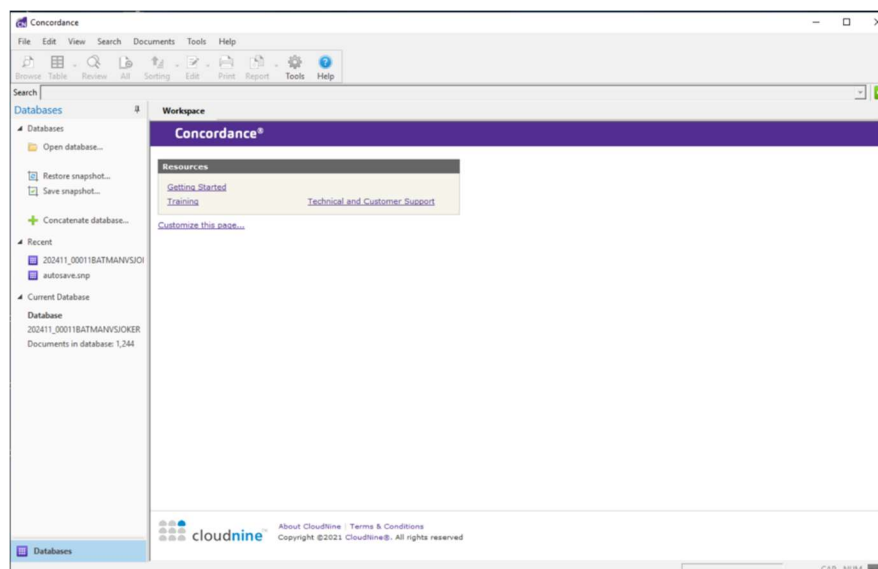
This PC > OS (C:) > Concordance Databases > ConcordancePOCDemo > SAMPLEDEMO001		
Name	Date modified	Type
DATA	1/15/2025 4:47 PM	File folder
IMAGES	1/15/2025 4:47 PM	File folder
NATIVE	1/15/2025 4:47 PM	File folder
TEXT	1/15/2025 4:47 PM	File folder

Inside the **SampleDemo001** folder, you will see four subfolders: Data, Images, Natives, and Text.

- **Data:** This folder contains the SampleDemo001.DAT, SampleDemo001.OPT, Create-Hyperlinks_v10.cpt, and ImportText_v10.CPT files used to create the database and load your data.
- **Images:** Contains multi-page images, named by the BegDoc#.
- **Native:** Contains the native files, named by the BegDoc#.
- **Text:** Text files named by the BegDoc#.

Concordance Workspace

When you launch Concordance, you are presented with the Concordance Workspace screen. On the Workspace screen, the left panel provides Database Information and links to **Open Database..**, **Restore / Save snapshot...**, **Recent** databases, and information about the **Current Database** or last database opened on your workspace during the session. The right pane is the Workspace, where data fields and text are displayed.



This is your first time launching Concordance. You will not see database information until the first database is created.

Creating the Concordance Database

Before starting work in Concordance, you must create a database and load the data. In the **Concordance Database Creation Wizard**, you choose the database type based on the data you are loading. There are three options:

- **Load File:** When data is processed using another application such as CloudNine LAW the processed data is exported from the application to Concordance ready load files. This includes the following:
 - **Data (.DAT) file** containing exported fields, field data, and path location to native and text files.
 - **Image (.OPT) file** containing the path location to the images. When images are not included, this file may contain the location of the native file.

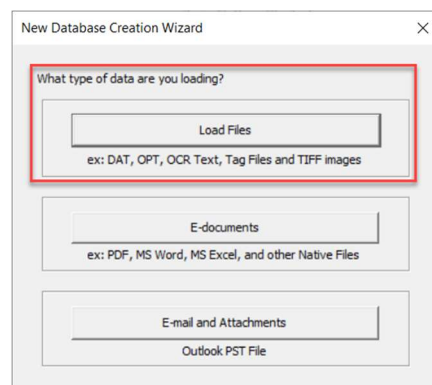
- **E-Documents:** Selected, this creates a Concordance E-documents database and is used to import native files that have not previously been processed.
- **E-mail and Attachments:** Creates a Concordance E-mail database and can be used to import an Outlook Mailstore (PST) file.

Creating the Concordance database from Load Files is the most common and preferred method as it provides the most flexibility with your discovery data. This includes combining paper (scanned) and electronic discovery (e-docs and e-mails) into one database project. Additionally, the processing of file types, expansion of files, and extraction of metadata is limited when ingesting directly into Concordance.

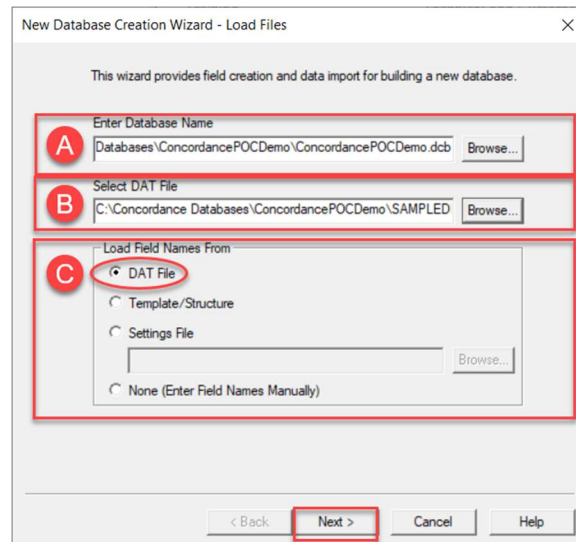
In the previous activity, you created a folder named "Concordance Databases" to store all related databases. Within this folder, you established a sub-folder called "ConcordancePOCDemo" to hold the database and its supporting files. Inside the "ConcordancePOCDemo" folder, you extracted the sample data load file. Having prepared your data, you are now ready to create the Concordance Database.

Activity: Create a New Concordance Database

1. Open Concordance.
2. Select **File – New**. Choose **Yes - This is a brand-new database...** to create the database with the **New Concordance Viewer**.
3. On the **New Database Creation Wizard**, under **What type of data are you loading?** Select **Load Files**.



4. The **New Database Creation Wizard – Load Files** screen opens.



- A. **Enter Database Name:** The location and name of the Database.
 - i. **Browse** to the location C:\Concordance Databases\ConcordancePOCDemo and select the ConcordancePOCDemo folder.
 - ii. Type the **File name, ConcordancePOCDemo**, then click **Save**.
 - B. **Select DAT file:** The DAT file is the data file that builds the records in the Concordance database. Browse to the database folder and open the SampleDemo001 folder: C:\Concordance Databases\ConcordancePOCDemo\POCDData\SampleDemo001. Select the **Data** folder then the **SAMPLEDEMO001.dat** file. Click **Open**. The path to the selected load file is displayed.
 - C. Under **Load Field Names From:** Select **DAT file**. This will create the fields from the column header of the DAT file.
5. Click **Next** to advance to the **Choose Delimiter** screen.

6. On the Choose Delimiter screen, verify or select the following:
 - A. **Format:** Select **Concordance default**.
 - B. **Data Delimiters:** Comma: **(020)**, Quote: **(254)**, Newline **(174)**.
 - C. **Data Delimiters:** Select **mm/dd/yyyy**.
7. Click **Next** to advance to the **Modify** screen.
8. The **Modify** screen opens and lists the metadata fields found in the first line of the DAT file. On the Modify screen you set the Image (Media) field and add any additional fields.

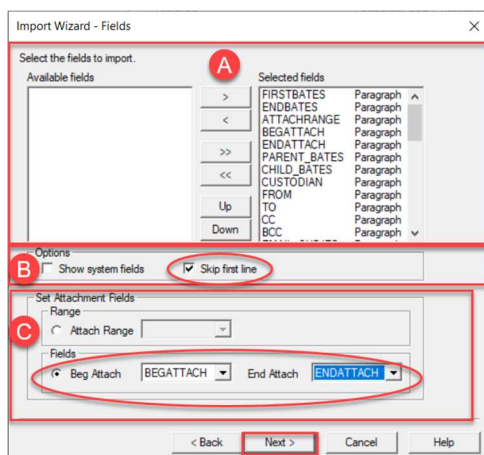
Field Name	Type	Length
FIRSTBATES	Paragraph	
ENDBATES	Paragraph	
ATTACHRANGE	Paragraph	
BEGATTACH	Paragraph	
ENDATTACH	Paragraph	
PARENT_BATES	Paragraph	
CHILD_BATES	Paragraph	
CUSTODIAN	Paragraph	
FROM	Paragraph	
TO	Paragraph	
CC	Paragraph	
BCC	Paragraph	
EMAIL_SUBJECT	Paragraph	
SUBJECT	Paragraph	
FILENAME	Paragraph	
DATESENT	Paragraph	
TIMESENT	Paragraph	
TIMEZONEPROC	Paragraph	
FILE_EXTEN	Paragraph	
AUTHOR	Paragraph	
LASTAUTHOR	Paragraph	
DATECREATED	Paragraph	

- A. In the **Field Name** list, click to select **FIRSTBATES**, at the bottom right, click **Image**. The **FirstBates** field is identified as the image key and is used to link records, near natives, or images.
- B. Next, you will add three New fields: Text1, Text2, and Text3. These fields are used to import the text. Click the **New** button at the bottom left corner. Your cursor is moved to the bottom of the Field Name list on an empty item. To Create a field:

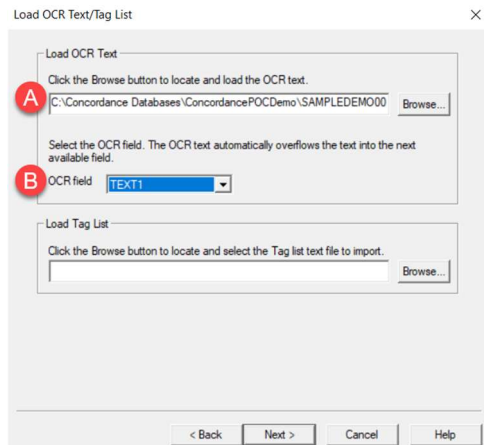
- i. **Name:** Enter **TEXT1**.
- ii. **Type:** Choose **Paragraph**.
- iii. Click **New**, to add another field.
- iv. Create two additional paragraph fields: **TEXT2** and **TEXT3**.
- v. The three fields appear at the bottom of the **Field Name** list.

9. Click **OK** to close the **Modify** screen.
10. A Concordance message appears identifying the **FIRSTBATES** field is the Image Key. Click **Yes** to continue.

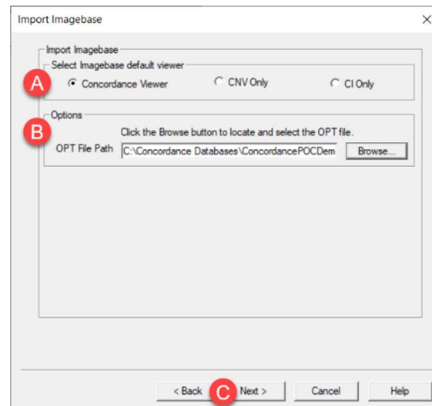
11. You are now on the **Import Wizard – Fields** screen.



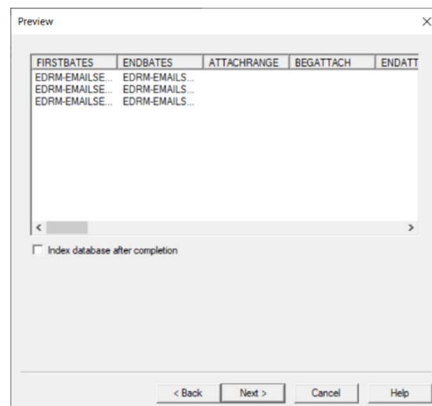
- A. **Select the fields to import.** Lists the Available and Selected fields for the import. Under the Selected fields section you should see all fields found in the DAT load file and fields created on the Modify screen.
 - B. **Options:** You can choose to Show system fields and Skip first line. Often the first line in the DAT contains the field names. Select **Skip first line** to prevent creating a record in the database of field names.
 - C. **Set Attachment Fields:** Links families for searching. Enable **Fields**, then select **BEGATTACH** for the **Beg Attach** field and **ENDATTACH** for the **End Attach** field.
12. Click **Next** to advance to the **Load OCR Text/Tag List** screen.
13. On **The Load OCR Text/Tag List** screen you can load OCR or Import a pre-defined list of tags.
- A. Click **Browse**, then navigate to **POCData\SAMPLEDEMO001\TEXT\001** selecting the **001** folder. **Note:** All text files must exist on the root of the selected folder.
 - B. Select **TEXT1** for the **OCR field**.



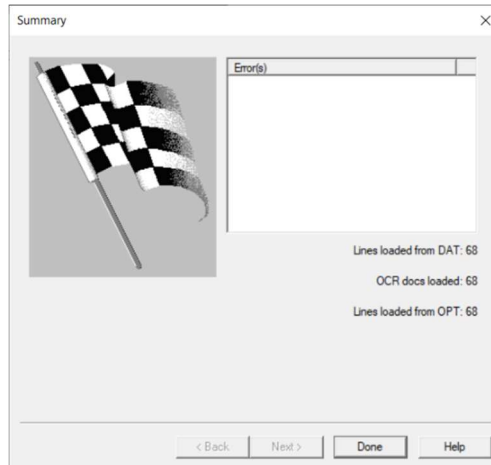
14. Click **Next** to move to the next screen.
15. You are on the **Import Imagebase** screen.



- A. Select **Concordance Viewer** as the **Select Imagebase default viewer**.
 - B. **Options:** For the OPT File Path, click **Browse...** to browse and select the **SAMPLEDEMO001.opt** file located at C:\Concordance Databases\ConcordancePOCDemo\POCDData\SAMPLEDEMO001\DATA
 - C. Click **Next**.
16. You are now on the **Preview** screen. Verify data is formatted properly.



17. Click **Next** to advance to the Summary screen. On the Summary screen, click **Create** to create the Concordance database and begin the import process.



18. The summary populates as data is loading to the Concordance database. The **Done** option becomes available when the DAT, OCR, and OPT loading is complete.
 - A. You should see 68 lines and docs loaded.
19. Click **Done**, to close the wizard.

Activity: Link Native Documents

You have created a new Concordance database and imported Data, Text, and Images. It is now time to create hyperlinks for the native files.

1. In the Concordance database, select **File - Begin program....**
2. **Browse** to the **SAMPLEDEMO001/DATA** folder and select the **Create-Hyperlinks_v10.cpt** file.
3. Click **Open**. The computer program file runs and then closes when complete.
4. In the Browse view, scroll to the NATIVEFILE field. The path for the Native File field is hyperlinked to the native file.

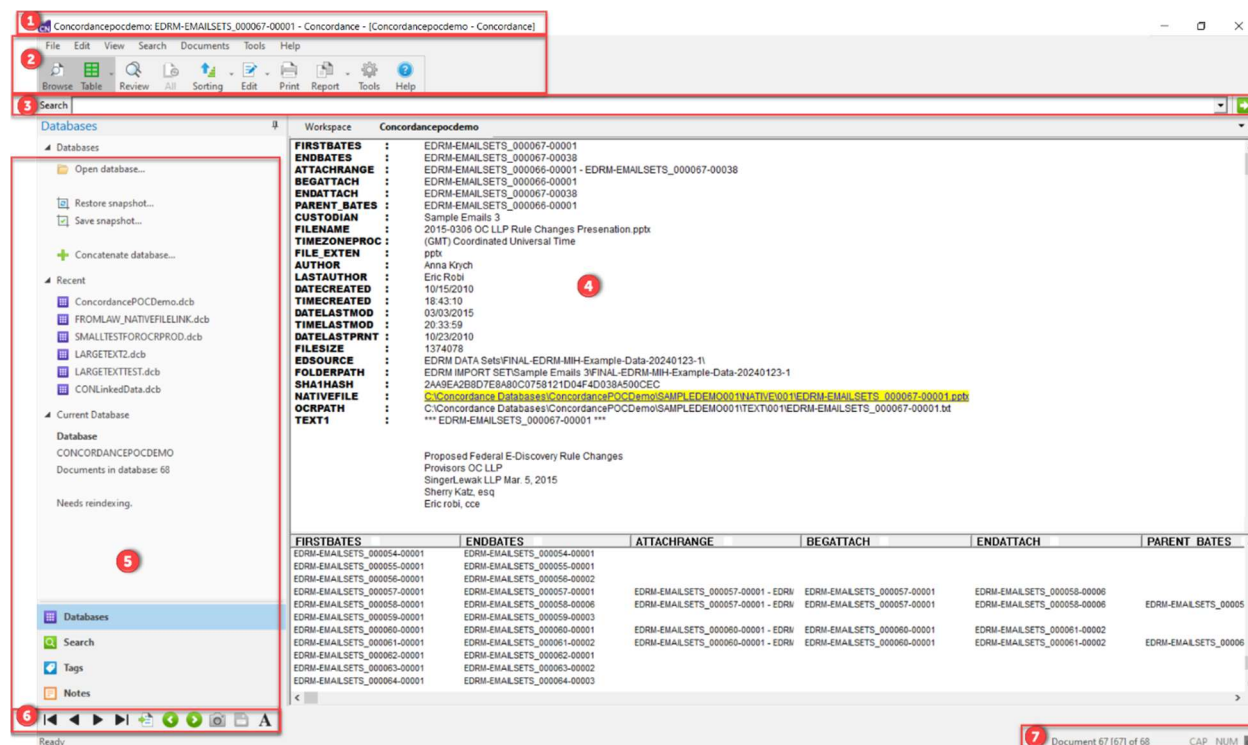


5. Click the hyperlink to open the native file. If the application is installed, then the file will open.

Concordance and Concordance Viewer

Congratulations! You have successfully created a Concordance database, imported data, and text, linked native files, and loaded Images. Before beginning the next activity, take a moment to familiarize yourself with the Concordance and Concordance Viewer.

Concordance User Interface



1. **Title Bar:** Shows the Database Name, current Document Number, and Concordance application.
2. **Menu bar:** Drop-down Menu and Toolbar.
3. **Search bar:** Use to quickly search for terms in the database.
4. **Document Window:** View database records in **Browse** and/or **Table** views (both views displayed above).
5. **Navigation Pane:** Quick access to tools available in Concordance. This includes:
 - a. Database
 - b. Search
 - c. Tags
 - d. Notes
 - e. Tally

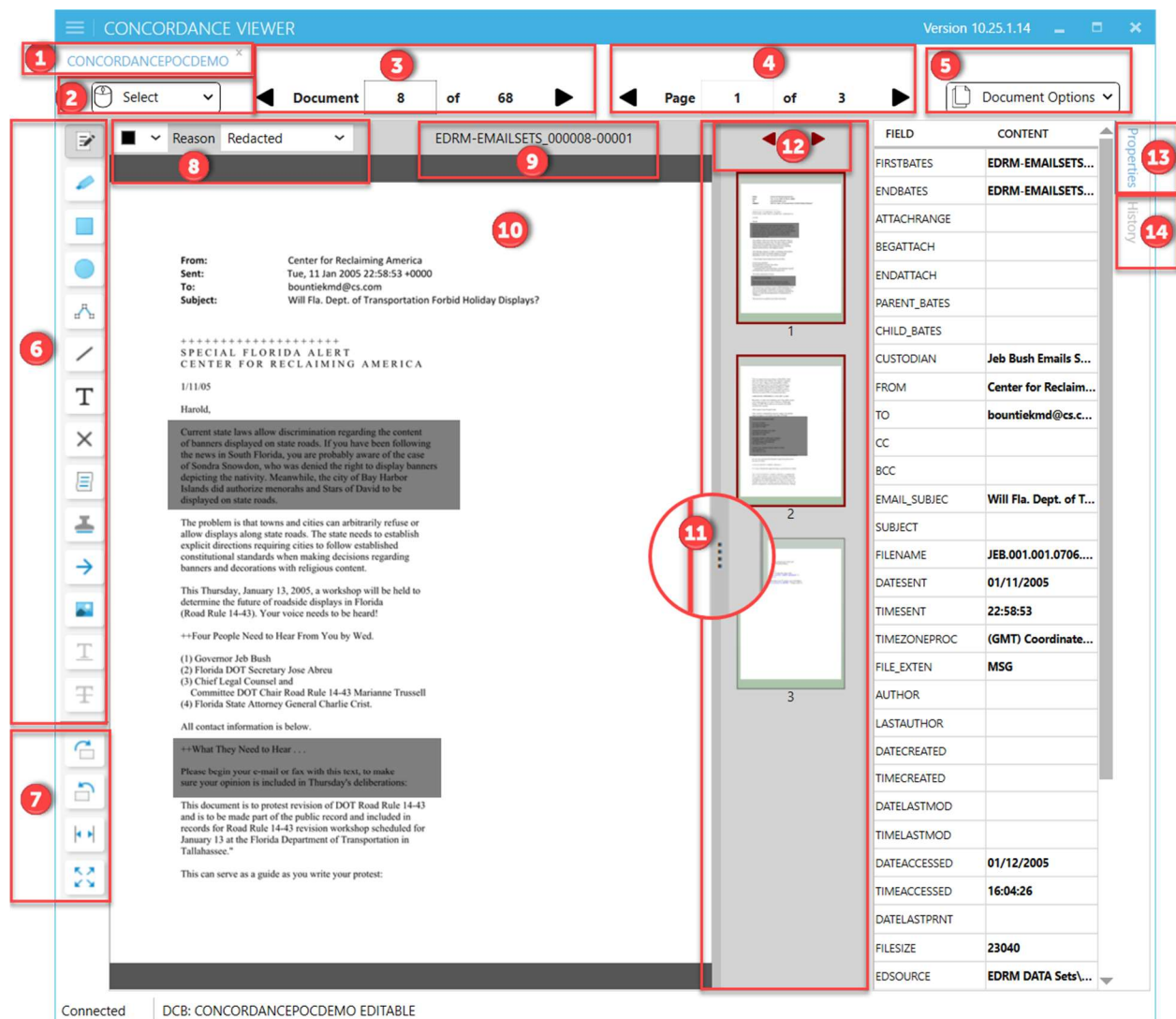
6. **Navigation Toolbar:** Use the options to navigate between records, go directly to a record, navigate search hits, and launch the viewer.
7. **Document Status:** References the current document and total documents. If a search is active, then the document status will reference search results.

Launching Concordance Viewer

In the Case Creation Import Wizard, you selected the OPT file to import images or near-native files. Images are viewed through the Concordance Viewer. To access the Concordance Viewer, select the

Camera  button.

Concordance Viewer



The screenshot shows the Concordance Viewer interface with the following numbered callouts:

- 1: Window title bar (CONCORDANCEPOCDEMO)
- 2: Select dropdown menu
- 3: Document navigation buttons (Previous, Next, First, Last)
- 4: Page navigation buttons (Previous, Next, First, Last)
- 5: Document Options dropdown menu
- 6: Left sidebar navigation menu
- 7: Document status bar (Connected, DCB: CONCORDANCEPOCDEMO EDITABLE)
- 8: Reason dropdown menu (Redacted)
- 9: EDRM-EMAILSETS_000008-00001
- 10: Main document content area
- 11: Document thumbnail view
- 12: Document thumbnail view
- 13: Properties History panel
- 14: Document thumbnail view

The main document content area displays an email from the Center for Reclaiming America, dated Tue, 11 Jan 2005 22:58:53 +0000, with the subject "Will Fla. Dept. of Transportation Forbid Holiday Displays?". The email body contains a "SPECIAL FLORIDA ALERT" from the Center for Reclaiming America, dated 1/11/05, addressed to Harold. The text discusses current state laws regarding discrimination and the content of banners displayed on state roads. It mentions the case of Sandra Snowden, who was denied the right to display banners depicting the nativity. The text also mentions the city of Bay Harbor Islands did authorize memorials and Stars of David to be displayed on state roads. The problem is that towns and cities can arbitrarily refuse or allow displays along state roads. The state needs to establish explicit directions requiring cities to follow established constitutional standards when making decisions regarding banners and decorations with religious content. This Thursday, January 13, 2005, a workshop will be held to determine the future of roadside displays in Florida (Road Rule 14-43). Your voice needs to be heard! ++Four People Need to Hear From You by Wed. (1) Governor Jeb Bush (2) Florida DOT Secretary Jose Abreu (3) Chief Legal Counsel and Committee DOT Chair Road Rule 14-43 Marianne Trussell (4) Florida State Attorney General Charlie Crist. All contact information is below. ++What They Need to Hear... Please begin your e-mail or fax with this text, to make sure your opinion is included in Thursday's deliberations: This document is to protest revision of DOT Road Rule 14-43 and is to be made part of the public record and included in records for Road Rule 14-43 revision workshop scheduled for January 13 at the Florida Department of Transportation in Tallahassee. This can serve as a guide as you write your protest:

The right sidebar displays a list of fields and their corresponding values:

FIELD	CONTENT
FIRSTBATES	EDRM-EMAILSETS...
ENDBATES	EDRM-EMAILSETS...
ATTACHRANGE	
BEGATTACH	
ENDATTACH	
PARENT_BATES	
CHILD_BATES	
CUSTODIAN	Jeb Bush Emails S...
FROM	Center for Reclaim...
TO	bountiekmd@cs.c...
CC	
BCC	
EMAIL_SUBJEC	Will Fla. Dept. of T...
SUBJECT	
FILENAME	JEB.001.001.0706...
DATESENT	01/11/2005
TIMESENT	22:58:53
TIMEZONEPROC	(GMT) Coordinate...
FILE_EXTEN	MSG
AUTHOR	
LASTAUTHOR	
DATECREATED	
TIMECREATED	
DATELASTMOD	
TIMELASTMOD	
DATEACCESSSED	01/12/2005
TIMEACCESSSED	16:04:26
DATELASTPRNT	
FILESIZE	23040
EDSOURCE	EDRM DATA Sets\...

1. **Database Name:** Displays the active database name.
2. **Select:** Drop-down menu for viewing the images. Options are **Pan/Zoom**, **Area Zoom**, and **Magnifier**.
3. **Document Navigation:** Navigate to Next and Previous documents The Current and Total document counts in the current results are displayed.
4. **Page Navigation:** Navigate pages within the selected document. You have Previous/Next arrows and can see the active Page and total Page count.
5. **Document Options:** NearNative and Image viewing options. You can choose:
 - a. **Sticky Mode:** Select redaction/markup mode, which is held during page and document navigation.
 - b. **Sticky Rotate:** Holds the rotation during navigation between pages and documents.
 - c. **Dual Page View:** Enabled shows two pages per document.
6. **Redaction/Markup Tools:** The redaction and markup options are available.
7. **Image View Tools:** Tools for viewing images include Rotate, Fit to Width, and Best Fit.
8. **Redaction / Markup Toolbar:** Options specific to the selected redaction or markup.
9. **Starting Document Number.**
10. **Image Window:** Displays the current image page.
11. **Thumbnail:** Click to open the Thumbnail View displaying each page of the document.
12. **Redaction Navigation:** When the Thumbnail view is displayed, navigate to the previous and next redactions and markups in the selected document.
13. **Properties:** Displays the document metadata.
14. **History:** Tracks the history of redactions/markups applied to the document pages.

Preparing for Review

You have created a Concordance database and imported data, images, natives, and text files. You have QC'd and verified the records imported. The next step is to prepare the data for review. The extent of how you prepare the database will largely depend on the policies and procedures you put in place. For this document, we are introducing you to a basic workflow using some of the most common features in Concordance. Please refer to the [Concordance Answer Center](#) to learn more about Concordance and how to administrate Concordance databases.

Create/Manage Tags

Using tags is a standard practice during document review. They provide flexibility and serve multiple purposes, such as creating review sets, tagging issues, and identifying responsive documents. How you choose to use tags will depend on your organization's policies and procedures, as well as the specific scope of your project.

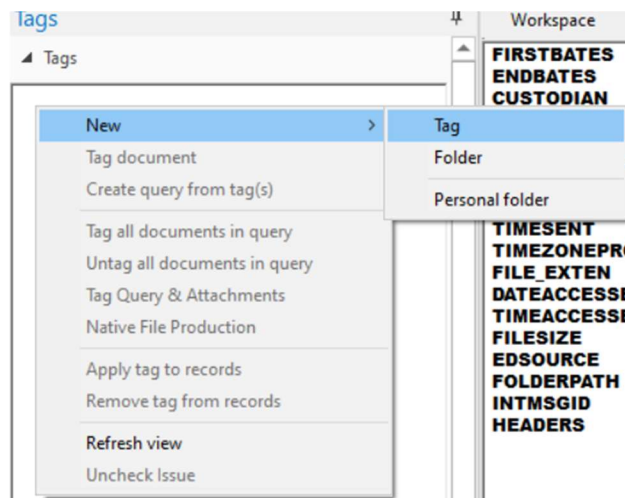
Activity: Create Tags

In this exercise, you will learn how to create tags in Concordance.

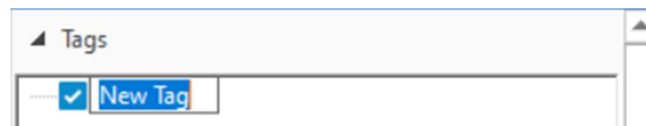
1. In the Concordance database click **Tags** from the Navigation Pane to open the **Tags** panel.



2. In the Tags Panel window, right-click to open the **Tag** menu. Select **New – Tag**.



A **New Tag** is checked and appears in the **Tags** pane ready to name.



3. Type **Responsive**, replacing the New Tag value. Click **enter** to create the tag. Repeat to add two additional tags: **NonResponsive** and **Produce**.



4. Checked tags indicate “Yes”, unchecked are “No”. When a new tag is created, the current record is automatically tagged yes (checked). To reset the value to no, uncheck the box next to the NonResponsive and Produce tags.
 - a. Responsive should be the only tag checked (yes) for the active record.

Activity: Create Folders to Organize Tags

You may choose to organize tags in a folder structure. For example, you may want to use Folders based on Review Sets, Confidential Designation, Import Sets, etc. Tags and folders can either be public, accessible to all users, or private, restricted to the user who created them.

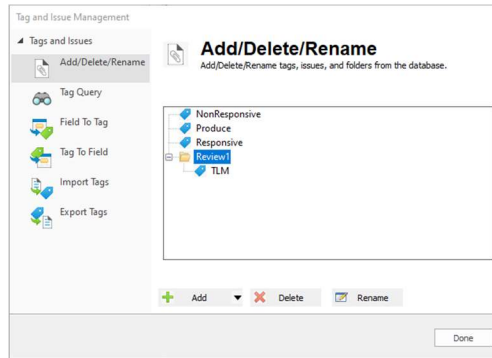
To create a folder organization:

1. In the **Tags** pane window, right-click to open the **Tags** menu. Select **New – Folder**.
2. A folder appears and is ready to edit. Name the folder **Review1**.
3. The folder requires at least one tag under it. Right-click on the folder, then select **New-Tag**.
4. For the tag, type your initials (ie TLM) and then click enter. Notice how the tag is indented under the Review1 folder.



Manage Tags and Issues

The **Tags and Issue Management** is available to manage tags. To open the Tags and Issue Management, select **Tools – ManageTags/Issues....**

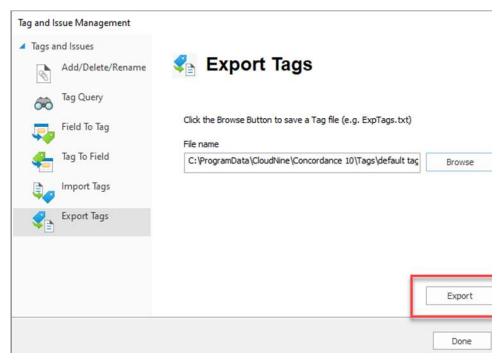


In the **Tag and Issue Management** window, you can:

- **Add/Delete/Rename tags:** An alternate location for building tags. The active record is not automatically tagged as yes when you add tags from this location.
- **Tag Query:** Create a query from a selected tag. Add/Remove tag from query.
- **Field to Tag:** Select a field to create tags from the values in a field. A new tag is created for each unique entry in the field.
- **Tag to Field:** Fills the selected field with "yes" tag names for each record.
- **Import Tags:** Use a text file to import a list of tag names to the database.
- **Export Tags:** Export a list of tag names to a text file that can be imported into other databases.

Activity: Export Tags

1. Select Tools-Manage Tags/Issues...
2. In the Tags and Issues Management window, select Export Tags.
3. Browse to your Concordance data folder (C:\ProgramData\CloudNine\Concordance 10). Create a new folder "Tags".
4. Select the Tags folder, then enter a filename, "Default Tags". Click Save to return to the Tag and Issue Management window.
5. Click Export.



6. Click Done to close the window.
7. Navigate to where you saved the default tag list: C:\ProgramData\CloudNine\Concordance 10\Tags and open the default tags.txt file in a text editor program.



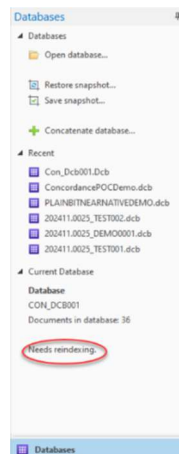
Notice this is a simple list file that you can manually create to import to other Concordance databases. Each tag name should be separated by a hard return.

Building the Dictionary for Searching

In Concordance you can run relational and full-text searches. Full-text searching is quicker as it utilizes a dictionary to find terms and return results. Indexing and Reindexing is an important step in Concordance database administration.

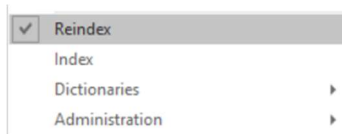
Activity: Index/ReIndex

Before you begin searching, the database must be indexed or reindexed. On the Databases pane, under **Current Database**, Concordance will indicate if indexing/reindexing is needed.



To Index/Reindex in Concordance

1. In the Concordance database, select the **File** menu to see options available for indexing.



2. The Reindex/Index options are available. A check to the left of Reindex or Index indicates the process needs to run. Click **Reindex**. Indexing begins, for larger databases a progress dialog opens. When indexing completes, the window closes, and you are ready to search.

Getting Started with Reviewing Records

If you performed all the previous activities in this document, you should have a Concordance database named **ConcordancePOCDemo** with metadata, text, and hyperlinks to the native files. When you click the camera icon, Concordance Viewer opens and displays the corresponding image. You created three tags: NonResponsive, Produce, and Responsive, a tag folder, Review1, with one tag, named by your initials.

You indexed your database and are now ready to start the review process.

Concordance Views

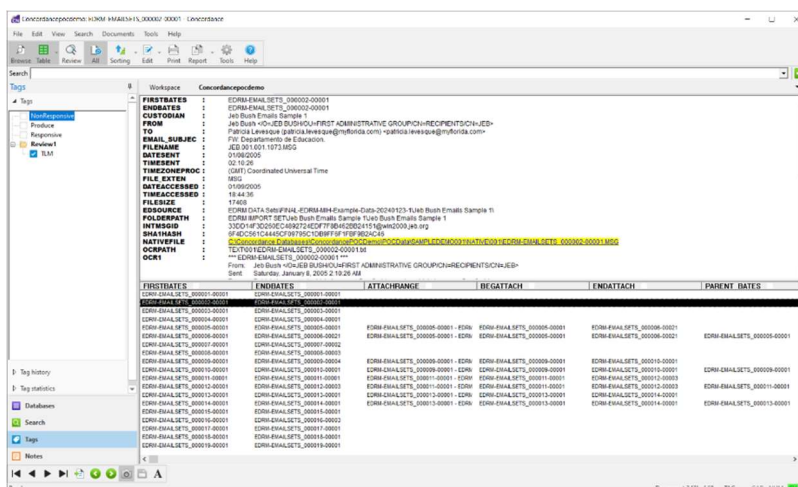
There are two ways to view data in Concordance.

-  **Browse** (default): Displays document data in a scrollable window.
-  **Table**: Displays data in grid format.

The **Browse** view is selected by default, click the **Table** view icon to open the **Table** view. The table is open at the bottom of the workspace.

To close a view, click the Browse or Table icons from the toolbar menu. To change or disable the Split screen, select **View – Split screen**.

Concordance Split View



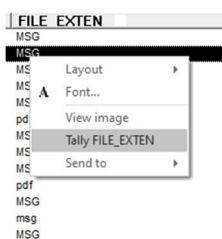
You will find both Browse and Table views are useful when reviewing data. Each view offers different features. Browse view is used often when navigating documents, searching data, and reviewing search hits. In Table view, you can customize the Layout to display specific fields, Sort, and Tally.

Activity: Tally a Field

The Tally feature is available in the Table view. Tally allows you to determine how many records exist with the same value. Once the Tally list is created, you can quickly drill down to view the results of a specific value.

Tally the File_Exten (file extension) field to determine file types in the database

1. In the ConcordancePOCDemo database, click **Table** to open table view.
2. In the Table view, scroll to locate the **FILE_EXTEN** field. Right-click in the column to see available options.



3. Select **Tally FILE_EXTEN**. The **Tally** Pane opens listing all values and the number of records with that value.



4. On the **Tally Pane**, under **Tally FILE_EXTEN**, double-click on **eml**, only the records with a file extension of eml appear in the Browse and Table views, a total of **28** documents.
5. To Verify, look at the Document count status at the bottom right corner. The document count should be the same as the eml count. The number in brackets [34] indicates the placement of the document in the entire database.

Document 1 [34] of 28 TAG CAP NUM CV

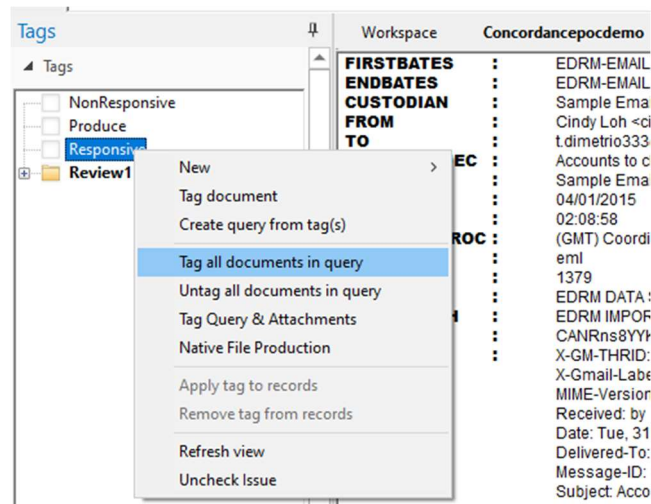
6. Click **Reset** on the **Tally** pane to clear the tally search. Notice at the bottom of the screen the document count resets to all records.
7. Now double-click on **pdf**, 6 records are returned, all PDF files.
8. Click **Reset**, to reset the query to all records. Click **Close** to close the Tally pane.

Activity: Tally a field, Query, and Tag results

In this activity, you will run a tally on the DateSent field, query an important date, then tag the results to produce.

1. In **Table** view, scroll to locate the **DATESENT** field. Right-click in the DateSent column, then select **Tally DATESENT**.
2. The Tally pane opens and lists values in the DATESENT field and total record counts for the value. Locate 04/01/2015 and double-click to return only the emails sent on 04/01/2015.
3. You should see a total of **8** records. Select **Tags** from the Navigation panel. The **Tags** pane opens.

4. Select and right-click on the Responsive tag, Tag options become available.



5. Select **Tag all documents in query**.
6. The eight documents are tagged Responsive.

Activity: Use the All Button

The **All** button is used to clear any active Tally or Search and return you to all records in the database.



1. On the Toolbar, click the **All** button. Any active Tally or Search is cleared and all records are displayed again.
2. Scroll to the bottom right of the Status bar. The Document Status shows the selected document and total document count. If you are on a tagged record, you will also see the TAG indicator.

Document 50 [50] of 68 TAG CAP NUM cv

Searching in Concordance

Searching is a key component during document review. Concordance offers basic and robust search options. In the next exercises, you will be introduced to searching and some of the search tools available in Concordance. For more information on Full-Text and Relational Searching in Concordance, refer to the [CloudNine Concordance Answer Center](#).

Activity: Searching with Quick Search

The Quick Search option is a popular way to search in Concordance and can be used to build simple or complex searches using Boolean connectors, search operators, and wildcards.

Quick Search is located on the main user interface, directly beneath the menu bar.



When searching in Concordance, the Browse view is used. In Browse view search hits are highlighted and you can quickly navigate the search hits. If the Table view is still open, click the Table button to close the table and only show the Browse view.

1. In Quick Search type the term **Education**, then click enter.
 - a. Six records are returned, and you are on the 7th record in the database.

Document 1 [7] of 6 TAG CAP NUM cv

2. In Browse view, scroll to see the search term highlighted.
 - a. The first record should have three search term hits highlighted.
3. Use the **Previous** and **Next** hit tools on the bottom left Navigation toolbar to move from one hit to the next. When you reach the last hit in the document, Concordance advances you to the first hit of the next document.



4. Click the **Tags** tab, to open Tag options. Right-click on the **Produce** tag, then click **Tag all documents in query**. The six documents are tagged Produce.
5. Click the **All** button to clear the search and return to all records in the database.

Activity: Use Wildcard *

Concordance supports the use of wildcards when running full-text or relational searches. Two wildcard characters can be used:

- Asterisk (*): replaces any number of characters at the beginning or end of a word.
- Question Mark (?): replaces a single character.

In this activity, you will use the asterisk (*) wildcard to include additional variance of the term Education.

1. In the Quick Search bar, enter **educa***, then click enter.
 - a. A total of 15 records are returned.

2. Use the Previous and Next hit options to navigate and review the search hits.
3. You should see the following hits:
 - a. Educacion
 - b. Education
 - c. Educational
 - d. Educable
4. Tag all results in the search as Produce.
 - a. Open the Tags tab, right-click on Produce, and select **Tag all documents in query**.
The fifteen records are tagged as Produce.
5. Click the **All** button to release the search and return to all records.
 - a. You should have 68 records.

Activity: Use Boolean Connector

The following Boolean connectors can be used:

- **And:** Contains both terms in the document.
- **Or:** Contains either terms or both terms.
- **Not:** Contains the first term but not the second term.
- **XOR:** Contains either term but not both.

In this activity, you will use different connectors to search the terms Department and Education. Multiple searches will be run, to show the behavior of the four connectors.

1. In the Quick Search bar, type **Department and Education**, then click Enter to run the search.
 - a. **Five** records are returned.
 - b. Navigate the search hits to see the results. All records should have both terms department and education.
 - c. Click **All** to return all documents.
2. In the quick search bar, enter **Department OR Education**, then click Enter to run the search.
 - a. **Twelve** records are returned.
 - b. Navigate the search hits, at least one of the terms must exist in the search result documents.
 - c. Click **All** to release the search and return to all documents.
3. Enter **Department NOT Education** in the quick search bar then click enter to execute the search.
 - a. **Six** documents are returned.
 - b. Navigate the search results. Records contain the term Department. Education is not a term in any of the records.
 - c. Click **All** to release the search and return to all records.

4. Type **Department XOR Education** in the quick search bar, then click Enter.
 - a. **Seven** records are returned.
 - b. Navigate your search results. Only documents with the term Department or Education are returned. Documents will not have both terms.
 - c. Click the **All** button to release the search results.

Activity: Proximity Search

Proximity searches allow you to search for terms within a certain distance of each other.

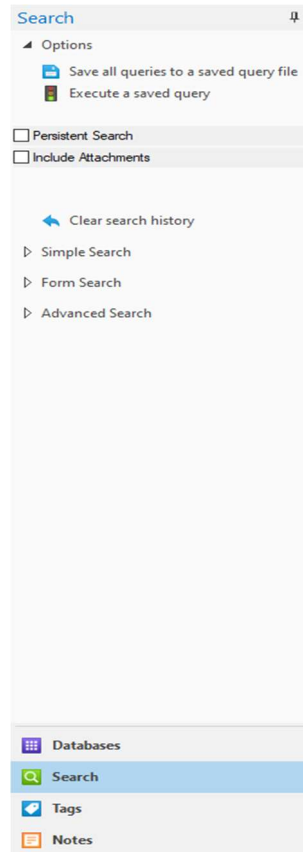
- **ADJ:** Adjacent searches require the terms to be next to each other and in the order specified
- **NEAR:** Terms are next to each other, but not in the specified order.
- **<WordRange>:** When an Adjacent or Near search is run, the term hits must fall within the number of words specified, up to 255.

To run a proximate search:

1. In the Quick Search bar, enter a search for the terms Florida and Governor within 5 words of each other. The search looks like this: **Florida ADJ5 Governor**. Click **Enter** to execute the search.
 - a. There are **three** records with Florida and Governor within five words in that order.
 - b. Click **ALL** to release the search. Search is cleared and you should see 68 documents.
2. In the Quick Search bar, change ADJ5 to **ADJ25**, then click enter to run the search.
 - a. **Five** documents are returned.
 - b. Use the search hits to navigate and review the additional records returned. In this search, Florida is within 25 words of Governor – in that order.
 - c. Click **All** to clear the search.
3. In Quick Search, type **Florida NEAR25 Governor** then click enter to execute the search.
 - a. **Eight** documents are returned
 - b. Search hits increased, highlighting additional terms within 25 words of each other.
 - c. Terms can be in any order.
 - d. Click **All** to clear the search.

Search Panel

In addition to the Quick Search feature, Concordance offers several search options and tools. On the left Navigation Pane, click **Search** to expand the **Search Panel**.



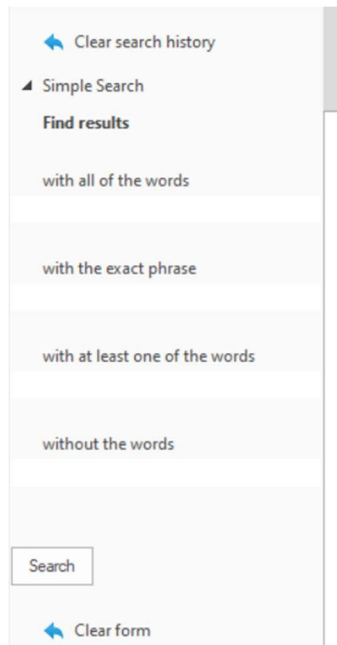
In the Search Panel, you can:

- **Save All Queries:** Saves all queries to a query file for execution later.
- **Execute a saved query:** Loads a saved query list. Click the **Review** button to execute a search from the list.
- **Persistent Search:** Enabled, persistent search terms are included in the search.
- **Include Attachments:** Enabled, attachments are included in the search results.
- **Clear Search History:** Clears the search history from the **Review** screen. Unless the queries are saved, the search history automatically clears when you close the database.
- **Simple Search:** Opens Simple Search options for searching.
- **Form Search:** Opens the Search Form.
- **Advanced Search:** Create more complex searches and view term hits.

The next activities include Simple, Form, and Advanced Searches.

Activity: Simple Search

1. In the ConcordancePOCDemo database, select **Search** from the Navigation Pane.
2. On the Search panel, click to expand the Simple Search options.



Clear search history

Simple Search

Find results

with all of the words

with the exact phrase

with at least one of the words

without the words

Search

Clear form

Simple Search offers four options to **Find results**:

- a. **with all of the words**: Performs an **AND** search, all words must appear on the document.
 - b. **with the exact phrase**: Acts like an **ADJ** search, the exact phrase must appear in a document.
 - c. **with at least one of the words**: Performs an **OR** search, returning documents with at least one of the entered terms.
 - d. **without the words**: Conducts a **NOT** search, none of the terms listed should appear in the document search results.
3. Under **with the exact phrase**, enter **State Laws**.

Simple Search

Find results

with all of the words

with the exact phrase
State Laws

with at least one of the words

without the words

Search

4. Click **Search** to execute the search.
 - a. Results return **two** documents.
5. Click **Clear form** to clear the search phrase on the form.
6. Under **with at least one of the words**, enter terms: **violation**, **discrimination**, and **compliance**. Note: You can use a space or comma (,) to separate terms.
7. Click Search.
 - a. **Ten** records are returned.
8. Navigate through the search hits to view results. Clear form to clear the search.
9. Return to Simple Search, enter **Law*** under **with all of the words** and click **Search**.
 - a. **Sixteen** records are returned. Your results include the terms law, laws, lawyer, lawful, and Lawton.
10. Click the **All** button to reset the search results to all records.
11. In Simple Search, leave the term **law*** under **with all of the words** and enter the terms discrimination, violation, and disability under **with at least one of the words**.
12. Click Search to execute the search.
 - a. **Eight** records are returned with a version of the term LAW and at least one of the terms discrimination, violation, and disability.
 - b. **Tag the results as Responsive**. Select Tags, then select Responsive. Right-click and choose Tag all documents in query, the eight documents are tagged Responsive.
13. Release the search by clicking the All button on the menu bar. Alternatively, you can type a **0 (zero)** in the Quick Search bar, then enter to release any active search. You should see 68 documents.

Activity: Form Search

The Form Search option helps simplify your searches by providing search syntaxes. On the Search Pane, select **Form Search** to open the **Query by Example** window.

The screenshot shows the 'Query by Example' window with the following components and numbered callouts:

- 1 Connector:** A dropdown menu with '*New*' selected.
- 2 Where to look:** A dropdown menu with '*Any Full Text*' selected.
- 3 How to look:** A dropdown menu with 'CO Contains' selected.
- 4 Look for:** A text input field.
- 5 Search criteria:** A large text area for writing the search criteria.
- 6 Result count:** A text input field for the number of results.
- 7 Dictionary:** A button to open the dictionary.
- 8 Notes:** A checkbox labeled 'Notes'.
- 9 Search then Browse:** A button to execute the search and open in Browse view.
- 10 Search then Table:** A button to execute the search and open in Table view.
- 11 Search:** A button to execute the search and return document and hit counts.
- 12 Done:** A button to close the window.

1. **Connector:** How the searches are connected. The first Connector will always be *New*, following you will have to determine how the searches are joined.
2. **Where to look:** Any full text or a selected field.
3. **How to look:** The search operator.
4. **Look for:** The text or data you wish to find.
5. **Search criteria:** How the search is written when the Search option is clicked.
6. **Result count:** The number of documents and hits for the search.
7. **Dictionary:** Use to see and select words in the dictionary.
8. **Notes:** Includes any notes applied to a record in the search.
9. **Search then Browse:** Executes the search and opens in Browse view.
10. **Search then Table:** Executes the search and opens in Table view.
11. **Search:** Executes the search returning document and hit counts to the result count area.
12. **Done:** Closes the Query by Example.

Activity: Build a Form Search

Build a date range search to see all emails sent in April.

1. In the Query by Example window, verify that ***New*** is selected for the **Connector**.
2. Under **Where to look**, click the drop-down to select the **DATESENT full text** field.
3. Under **How to look**, click the drop-down to see available search operators. Select **GT Is greater than**.
4. In **Look for**, type **03/31/????**.
5. On the next line, select **and** for the **Connector**.
6. For **Where to look**, select **DATESENT full text**.
7. Select **LT is lesser than** from the **How to look** drop-down.
8. Type **05/01/????** in **Look for**. This returns all records in April, regardless of the year.
9. Click the **Search** button.

The screenshot shows the 'Query by Example' window with the following configuration:

Connector	Where to look	How to look	Look for
New	DATESENT full text	GT Is greater than	03/31/????
and	DATESENT full text	LT Is less than	05/01/????
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	
adj	*Any Full Text*	CO Contains	

The query text area displays: (DATESENT GT "03/31/????") and DATESENT LT "05/01/????"

At the bottom, it shows: 16 hits in 16 documents

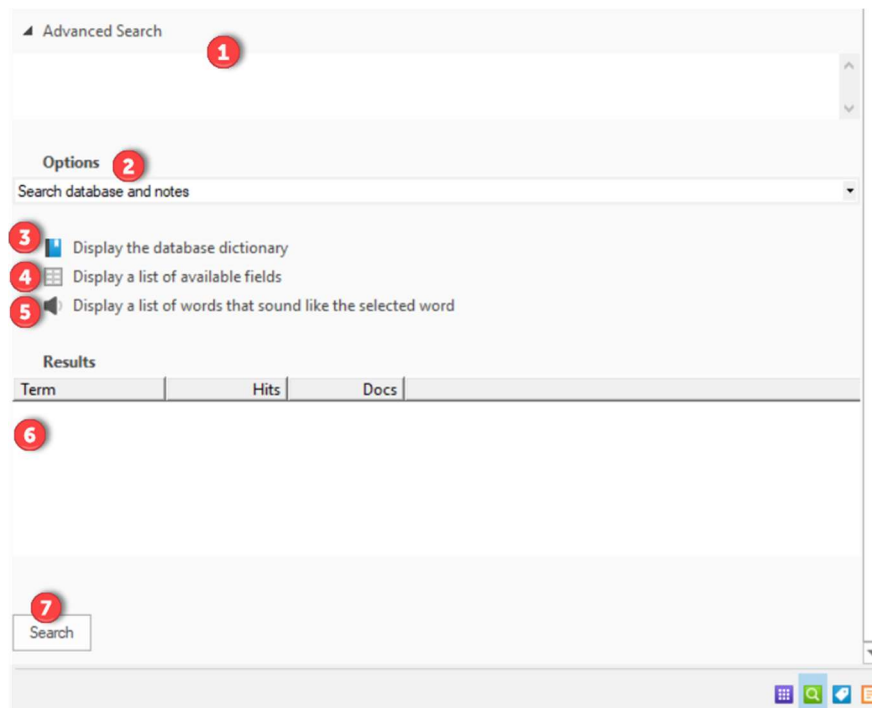
Buttons: Dictionary, Notes, Search then Browse, Search then Table, Search, Done

The **Search criteria** window shows how the search is written. The **Result count** shows the Total hits (16) and documents (16) in the search.

10. To execute the search and review the data, use the **Search then Table** option.
11. Search results are returned in the table view. Scroll to the **DateSent** field and verify only records with a Sent Date of April are returned.
12. Click the **All** button to release the search.

Advanced Search

The Advanced Search option is used for more complex searching and/or to review search term hits. On the Search panel, click **Advanced Search**.



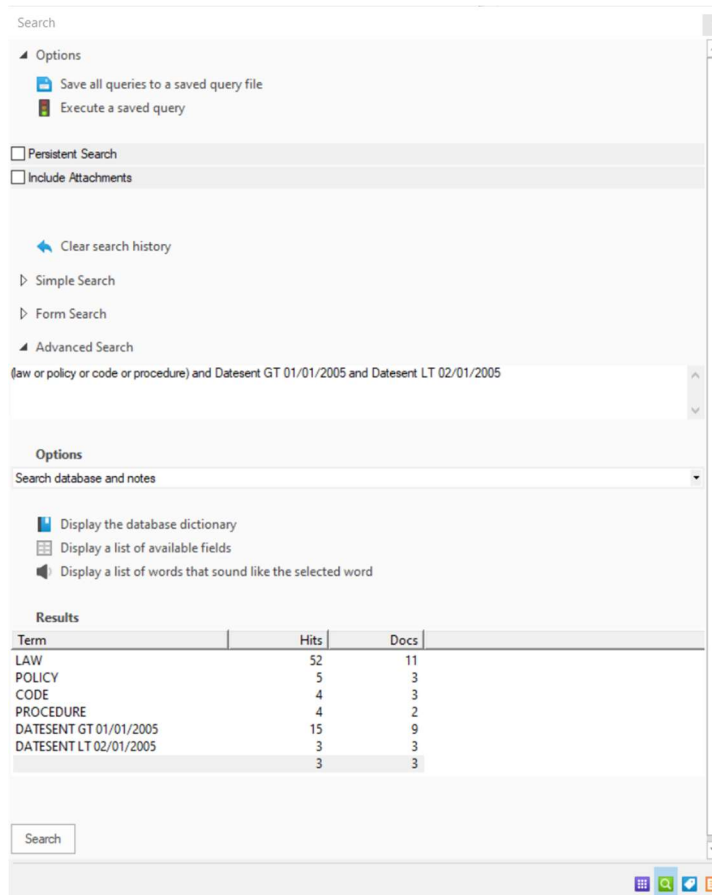
1. **Advanced Search** builder: Here you will build your search.
2. **Options:** Decide if you will be searching the Database only, Notes only, or Search database and notes.
3. **Display the database dictionary:** Opens the wordlist dictionary. You can select terms to add to your search criteria.
4. **Display a list of available fields:** View and select fields.
5. **Display a list of words that sound like the selected words:** Find words that look or sound similar to a selected word.
6. **Results:** Shows term hits and the number of documents the term is found in.

Activity: Create an Advanced Search

In this activity, you will create a search using keywords and a date range.

1. Expand the Advanced Search options.
2. In the Advanced Search builder, type (law or policy or code or procedure) and Datesent GT 01/01/2005 and Datesent LT 02/01/2005
3. Click the Search button or press Enter.

4. Search terms appear in the Result list with the number of hits and documents per term. Scroll to the bottom of the list and double-click the final entry.



- a. A total of 3 records are returned to the database view.
5. Click Tags to open the Tag panel, right-click on Responsive, and select **Tag all documents in query**. The three documents are tagged.

Activity: Isolate Documents Tagged Produce or Responsive

In previous activities, you searched and tagged documents as Produce or Responsive. In this activity, you will learn how to Create a query from tag(s). You will then learn to combine two previously executed searches into one, reviewing the documents tagged yes for both Produce and Responsive.

1. Launch Concordance and open the ConcordancePOCDemo database.
2. Select **Tags** from the Navigation Pane.
3. On the Produce tag, right-click to see tag options. Select **Create query from tag(s)**.

- a. Any documents tagged (checked) produced are returned in the query, a total of 15.
4. On the menu bar, select **All** to return to all records (68).
5. In the **Tags** pane, right-click on the Responsive tag and select **Create query from tag(s)**.
 - a. A total of 16 documents are returned.
6. Click **All** to release the query results and see all documents in the database.
7. On the menu bar, click the **Review** button to open the Review window.

Search Number	Number of Hits	Number of Docs	Search Term(s)
00000	68	68	<Entire Database>
00001	15	15	"»Tagging Produce«"
00002	16	16	"»Tagging Responsive«"

The Review view lists all searches conducted during the current session. Here you can:

- a. Double-click a search from the list to activate the search.
 - b. Use the Search Number to combine searches.
8. In the Quick Search option, type **1 OR 2** and click enter. There should be a total of 26 records in the search results tagged as Produce, Responsive, or both.
9. Create a new Tag, **NewResponsive** (On the Tag pane, right-click and select **New** then enter the tag name).
10. Right-click the new tag, then select **Tag all documents in query**, the 26 documents should be tagged **NewResponsive**.
11. Click the **All** option to release the search (**Note:** you can also click the first search in the **Review** table or type **0** in the quick search option and click enter).
12. You should see all records (68) in the database again. Close the Review table.

Concordance Workflow Recap

So far in a standard workflow, you have

- Created a database and imported data, text, and images.
- Created hyperlinks for the native files.
- Created tags.
- Learned about Browse and Table views.
- Used the Tally feature and tagged results from the query.
- Learned search options to include Quick Search, Simple, Form, and Advanced search methods. In addition, you learned about different search operators, connectors, and wildcards.
- Tagged records as Responsive or Produced.
- Learned how to use the search Review table and generate queries by search number.

The next step is to review the documents tagged **NewResponsive**. The documents are imaged and ready to be reviewed in Concordance Viewer.

Concordance Viewer

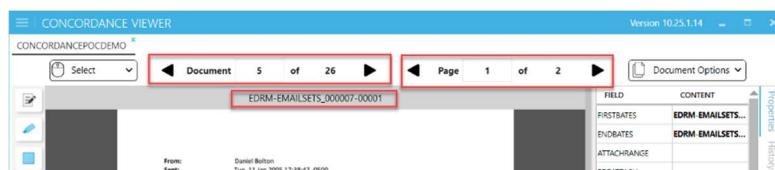
A common workflow is to prepare the data for review by running preliminary searches and tagging the results. Once the initial searches are run, a more thorough review occurs where the data, natives, and image states of documents are reviewed to determine what will be produced and if markups or redactions are needed. Concordance Viewer is used to view corresponding near natives or images and apply markups or redactions.

Previously, you were introduced to the Concordance Viewer. In the next activities, you use Concordance Viewer to review and prepare documents for production.

Activity: Concordance Viewer – Navigating

1. In the **ConcordancePOCDemo** project, in the Tag pane, right-click on the NewResponsive tag and **Create query from tags**.
 - a. 26 Documents are returned.

2. Click the **Camera**  button on the bottom navigation toolbar to launch Concordance Viewer. The image of the active record is displayed. The **Starting Number** (multi-page images) or Page ID (single-page images) appears at the top of the image window.



3. The **Document** navigation tool indicates the current document and total documents from the query results. Click the **Next**  arrow to move to the next document. Continue navigating through the documents until you reach document five (5), which is a two page document.
4. Use the **Page** navigation to move between each page of a document. When the last page of the document is reached, the viewer advances to the first page of the next document.
5. Click the **Previous**  arrow to move to a previous page or document.
6. Type **16** in the Document navigation tool, then click enter. You are on the 16TH document of the query results.
7. In the Page navigation tool, type 5 then click enter. You are now on page 5 of the document.

Redactions and Markups

As you review documents, you can apply redactions or other markups to the images. Concordance Viewer offers a variety of Redaction and Markup options. The Redaction and Markup toolbar is on the left side of the viewer.



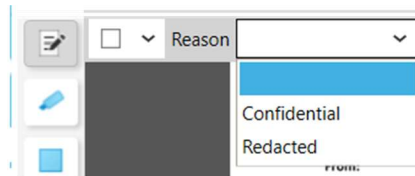
1. **Redaction:** Cover privileged information on an image.
2. **Highlight:** Highlight an area on an image.
3. **Rectangle:** Draw a rectangle on the image.
4. **Circle:** Draw a circle on an image.
5. **Connected Lines:** Use Connected Lines to highlight an area on the image.

6. **Line:** Use a single line to cover content on the image.
7. **Text:** Create a text box to cover an area.
8. **Crossout:** Mark through content with an X.
9. **Note:** Apply a note to the image.
10. **Stamp:** Stamp an area of the image.
11. **Arrow:** Draw an arrow on the image.
12. **Image:** Embed an image onto a portion of the image.
13. **Underline:** If searchable PDF, underline text on the image.
14. **Strikethrough:** If searchable PDF, strikethrough text on an image.

Activity: Apply a Redaction

1. In Concordance Viewer, select the first document.

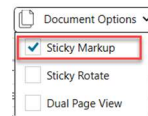
2. On the Markup toolbar, select the **Redaction**  tool. The Redaction options appear allowing you to select a redaction color (black is default) and redaction Reason (default is Redacted).



3. Click the drop-down next to the color selection box and choose a color for the redaction. White or Black is the most common redaction color.
4. In the **Reason** text box, type **Confidential** then click enter to save the reason to the drop-down list. Select Confidential for your redaction reason. The redaction reason will appear on the redacted area of the produced image.
5. On the image, around the Email header press your left mouse button and draw the redaction to cover the Email header.
6. The redaction is transparent allowing you to see what is redacted. When produced, the redaction is solid and will include the reason if selected. Hover your mouse over the redaction to see history information.



- Go to the next document, change the redaction reason, then apply another redaction.
- In the top right corner, select the **Document Options** drop-down to see the options available. Select **Sticky Markup**. When Sticky Markup is enabled, the redaction or markup tool selected will remain selected.

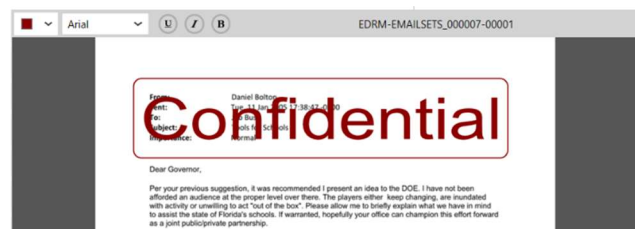


- Apply redactions to a couple more documents.

Activity: Apply a Confidential Stamp

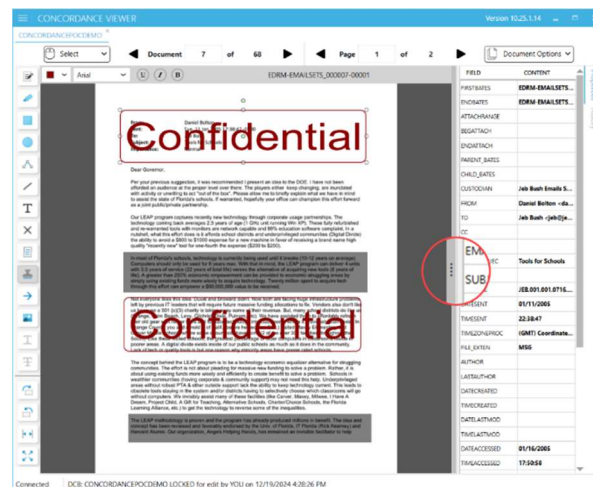


- On the Markup toolbar, select the Stamp button. When selected, the Stamp options appear in the top left corner of the image window.
- Use the left mouse to draw the Confidential stamp onto the image



Activity: Opening Thumbnail View

- Click the **Ellipse** on the right side of the image window.



The thumbnail view opens and displays each page of the image. Use the arrow keys at the top of the thumbnail view, to move to the previous or next redaction or markup.

4. Type **BEGPRODNO** in the **Name** section.
5. For **Type**, select **Paragraph**.
6. Click **Enter** to add the field to the **Field Name** list.
7. Repeat steps 3-6 to add the three additional fields: **ENDPRODNO**, **PRODPATH**, and **PRODTEXTPATH** all as paragraph field types.
8. The four fields have been added to the database and appear in the Field Name list.

Field Name	Type	Length
DATELASTMOD	Paragraph	
TIMELASTMOD	Paragraph	
DATEACCESSED	Paragraph	
TIMEACCESSED	Paragraph	
DATELASTPRNT	Paragraph	
FILESIZE	Paragraph	
EDSOURCE	Paragraph	
FOLDERPATH	Paragraph	
INTMSGID	Paragraph	
HEADERS	Paragraph	
SHA1HASH	Paragraph	
NATIVEFILE	Paragraph	
OCRPATH	Paragraph	
OCR1	Paragraph	
OCR2	Paragraph	
OCR3	Paragraph	
BEGPRODNO	Paragraph	
ENDPRODNO	Paragraph	
PRODPATH	Paragraph	
PRODTEXTPATH	Paragraph	

Status

Documents 68

Fields 43

Punctuation .,/

Name PRODTEXTPATH

Type Paragraph

Length

Places

Format

☐ Image ☐ Key ☐ Accession

☐ System ☒ Indexed

New Insert Delete Save To File Append Equivio Fields OK Cancel

9. Click **OK** to close the Modify window.
10. A Concordance warning message advises fields will be modified. These are new fields, click **Yes** to proceed.

Concordance

You are about to modify the type or length for the listed fields. You may lose data due to truncation or conversion. Do you want to continue?

BEGPRODNO
ENDPRODNO
PRODPATH
PRODTEXTPATH

Yes No

11. The four fields have been successfully added to the database.
12. Select **File-Reindex** to ensure the database is up to date.

Activity: Create a Production

1. In the ConcordanceDemoPOC project, click **Tags** on the navigational panel. Right-click on the tag NEWResponsive and select **Create query from tags**.
 - a. You should have 26 documents in your query results.
2. Select **Tools-Production-Production...** to open the **CONCORDANCE PRODUCTION** window. The **Concordance Production** window is organized based on specific production options.

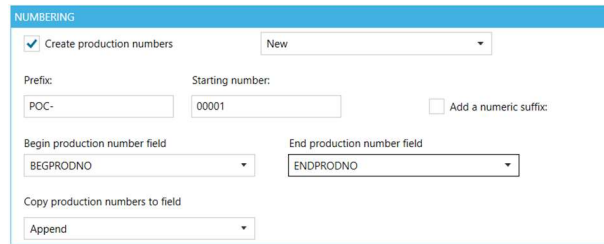
The screenshot shows the 'CONCORDANCE PRODUCTION' window. It has three main sections: 'NAMING', 'NUMBERING', and 'OUTPUT SETTINGS'.
- **NAMING**: A 'Settings' dropdown menu is set to 'POCSETTINGS'. Below it are 'Save', 'Save as default', and 'Remove' buttons.
- **NUMBERING**: A checkbox 'Create production numbers' is present.
- **OUTPUT SETTINGS**:
 - 'Create place holders for unsupported/missing files' is checked.
 - 'Volume folders' is checked. It has a 'Prefix' field with 'PROD', a 'Starting Number' field with '0001', and a 'Maximum Volume Size' field with '10GB'.
 - 'File folders' is checked. It has a 'Prefix' field, a 'Starting Number' field with '001', and a 'Maximum Record Count' field with '1000'.
 - 'Production path' is 'C:\Concordance Databases\20.' with a 'Browse...' button.
 - 'Create OPT' is checked. 'OPT path and file name' is 'C:\Concordance Databases\20.' with a 'Browse...' button.
 - 'Create scrub redacted text files' is checked. 'Output path for text files' is 'C:\Concordance Databases\PR' with a 'Browse...' button.
At the bottom are 'Preview', 'Start production', and 'Cancel' buttons.

3. The **NAMING** section saves and manages production setting profiles. Enter a **Settings** name, for example POCSettings then click **Save**.

This is a close-up of the 'NAMING' section. The 'Settings' dropdown menu is set to 'POCSETTINGS'. Below it are 'Save', 'Save as default', and 'Remove' buttons.

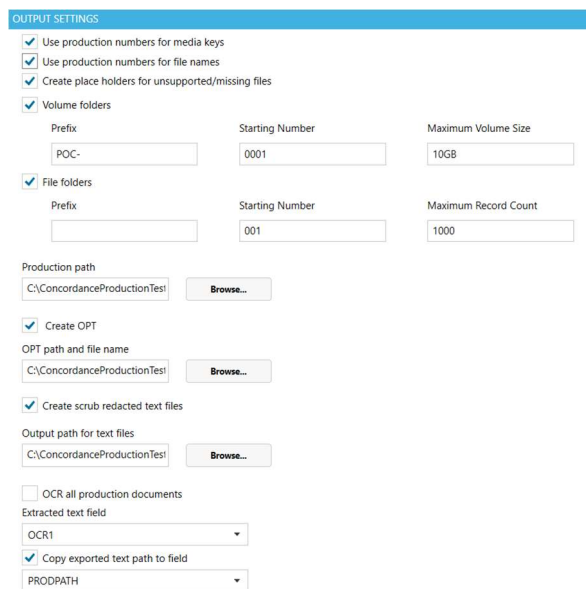
This creates the initial setting profile. Once you have selected production options you will **Save** again to create the settings profile for the production.

4. In **NUMBERING**, you decide how to number the production pages and files. Select **Create production numbers** to expand the Numbering section.



The NUMBERING window is used to configure production numbering. It includes a checkbox for 'Create production numbers' (checked), a dropdown for 'New' (selected), a 'Prefix' field with 'POC-', a 'Starting number' field with '00001', an unchecked 'Add a numeric suffix' checkbox, 'Begin production number field' and 'End production number field' dropdowns both set to 'BEGPRODNO' and 'ENDPRODNO', and a 'Copy production numbers to field' dropdown set to 'Append'.

- a. There are two options for creating production numbers: **New** or **From existing field**. Select **New**.
 - b. Enter a **Prefix** such as **POC-**.
 - c. Enter the **Starting number**, **00001**.
 - d. The **Begin production number field** and **End production number field** options write the production numbers back to the selected field in the Concordance database. From the drop-down list, select the **BEGPRODNO** and **ENDPRODNO** fields you created in the previous activity.
 - e. For **Copy production numbers to field**, select **Append**.
4. **Output Settings:** Determines how the Produced files and folders are named.



The OUTPUT SETTINGS window contains several sections:

- General:** Checkboxes for 'Use production numbers for media keys', 'Use production numbers for file names', 'Create place holders for unsupported/missing files', and 'Volume folders' (all checked).
- Volume folders:** Fields for 'Prefix' (POC-), 'Starting Number' (0001), and 'Maximum Volume Size' (10GB).
- File folders:** Checkboxes for 'File folders' (checked), 'Prefix' (empty), 'Starting Number' (001), and 'Maximum Record Count' (1000).
- Production path:** A text field with 'C:\ConcordanceProductionTest' and a 'Browse...' button.
- Create OPT:** Checkboxes for 'Create OPT' (checked), 'OPT path and file name' (C:\ConcordanceProductionTest), and 'Output path for text files' (C:\ConcordanceProductionTest), each with a 'Browse...' button.
- OCR:** Checkboxes for 'OCR all production documents' (unchecked) and 'Copy exported text path to field' (checked). It also includes an 'Extracted text field' dropdown set to 'OCR1' and a 'PRODPATH' dropdown.

- a. Select the first three options:
 - i. **Use production number for media keys**,
 - ii. **Use production number for file names**, and
 - iii. **Create placeholders for unsupported/missing files**.
- b. **Volume folders:** Organizes the productions to a manageable size.
 - i. Under **Prefix**, enter **POCProduction-**
 - ii. Enter the **Starting Number**, **0001**.
 - iii. **Maximum Volume Size:** type **10GB**.

- c. **File folders:** Determines how many files will be written to each subfolder within the volume.
 - i. For Starting Number: Enter **001**.
 - ii. Maximum Record Count: Type **1000**.
 - d. **Production Path:** The location where the produced files will be saved. Click **Browse** to navigate to the production path, then **Select Folder**. For this POC, we suggest the path **C:\ConcordanceProductions\ConcordancePOCDemo**.
 - e. Select **Create OPT**, then **Browse** to the root of the Production Path and enter **ConcordancePOCDemo** for the **File name**.
 - f. Enable **Create scrub redacted text files**. Click **Browse...** and choose where you wish to output the text files. In this case, the root folder ConcordancePOCDemo is selected.
 - g. Since text already exists, there is no need to OCR all of the files in the production, just those with redactions. Under **Extracted text field**, select **TEXT1**.
5. **Copy exported text path to field** and select the **PRODTEXTPATH** field.
 6. **IMAGE SETTINGS:** Identifies how the Images will be produced.

IMAGE SETTINGS

File type	Page settings	Color settings
Tiff ▼	Single-page ▼	Black and white CCITTFAX4 cor ▼
☒ Fit image inside header/footer		

- a. **File type:** In the drop-down, choose the image format to produce. You can select Tiff or Pdf. For this POC, select **Tiff**.
 - b. **Page Settings:** Determines the page output for the image file. You can produce the images as: **Multi-page** (all pages in a document are produced in one file) or **Single-page** (each page in a document is produced as its own file). Select **Single-page**.
 - c. **Color settings:** Choose to produce images in Black and white or Color. Select **Black and white**.
 - d. Select **Fit image inside header/footer** to apply a header/footer to the image without the risk of overlaying content.
7. **MARKUPS:** The selected markups are permanently applied to the produced images.

MARKUPS		
☐ Select All		
☒ Redaction	☐ Text	☐ Note
☐ Image	☐ Stamp	☐ Line
☐ Connected Lines	☐ Crossout	☐ Arrow
☐ Rectangle	☐ Ellipse	☐ Strikethrough
☐ Highlight	☐ Underline	

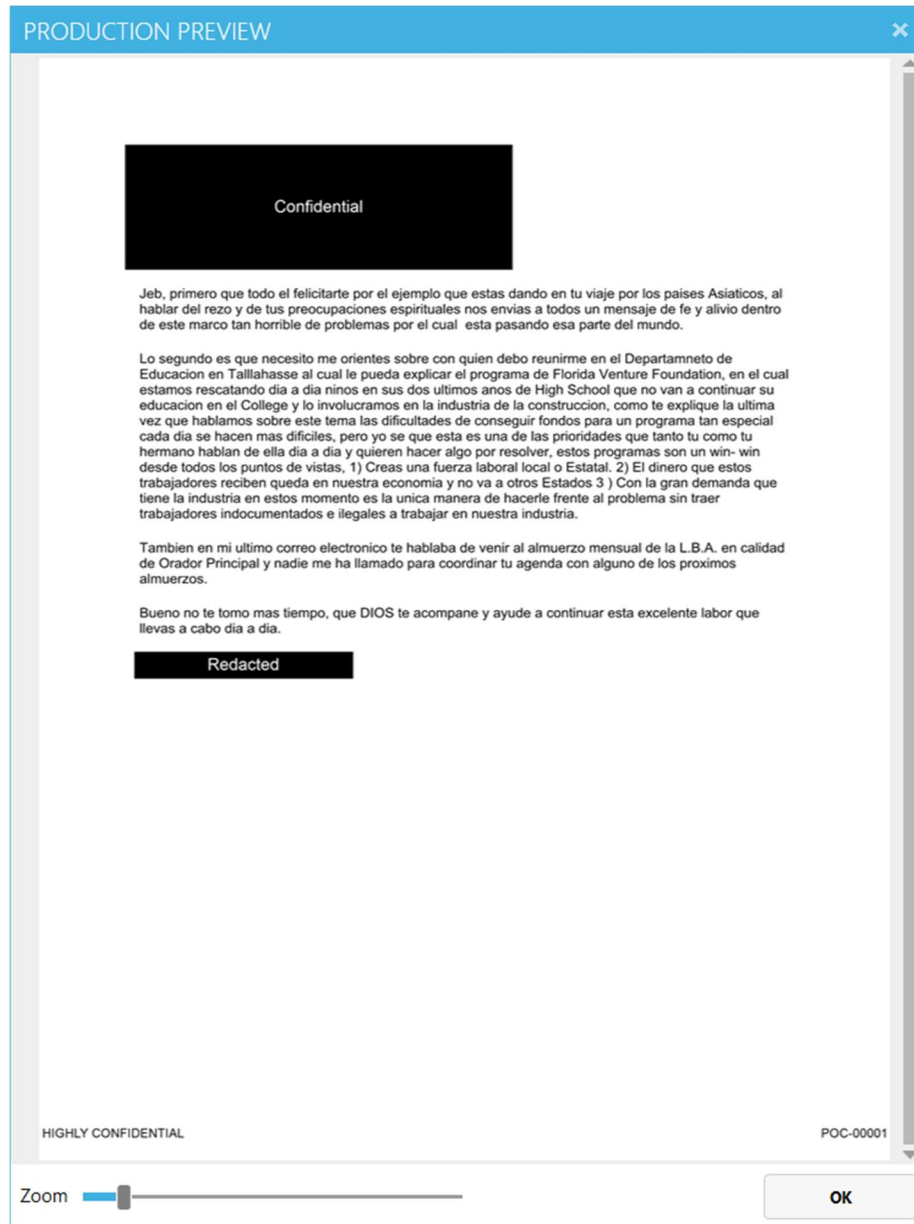
a. Select **Redaction**.

8. **HEADERS AND FOOTERS:** Allows you to embed the image with information entered or from a selected field. You can apply Headers and Footers, Margins, and a Watermark to the produced images.

a. Select **Include headers and footers** to expand all options.

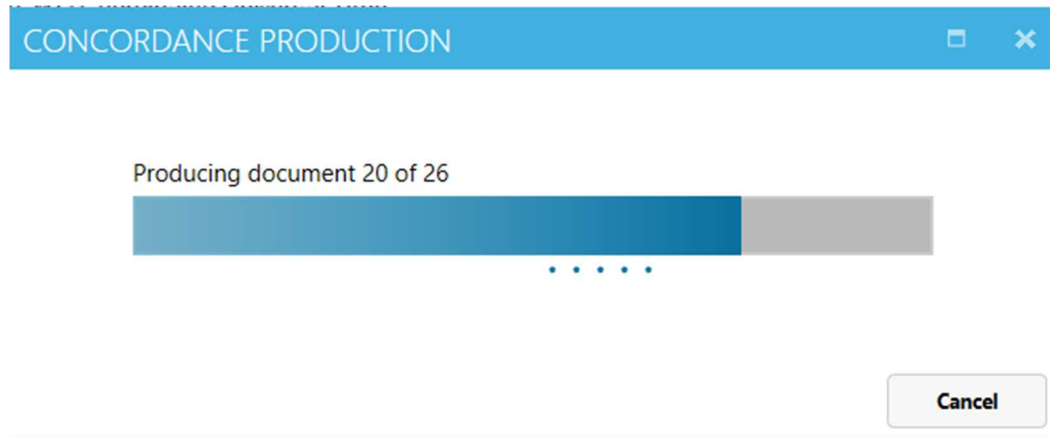
HEADERS AND FOOTERS		
☒ Include headers and footers		Font
HEADERS AND FOOTERS		
Left header None ▼	Center header None ▼	Right header None ▼
Left footer HIGHLY CONFIDENTIAL ▼	Center footer None ▼	Right footer Page ID ▼
MARGINS		
Left margin top None ▼	Right margin top None ▼	
Left margin center None ▼	Right margin center None ▼	
Left margin bottom None ▼	Right margin bottom None ▼	
WATERMARK		
Watermark None ▼		

- b. Under **HEADERS AND FOOTER**, for the **Left** footer, type **HIGHLY CONFIDENTIAL** then enter to save and select from the list. Under the **Right footer**, select **Page ID** from the drop-down list.
 - c. Do not select anything for MARGINS or WATERMARK.
9. Click **Preview** to see how the HEADERS AND FOOTERS will appear on the image.

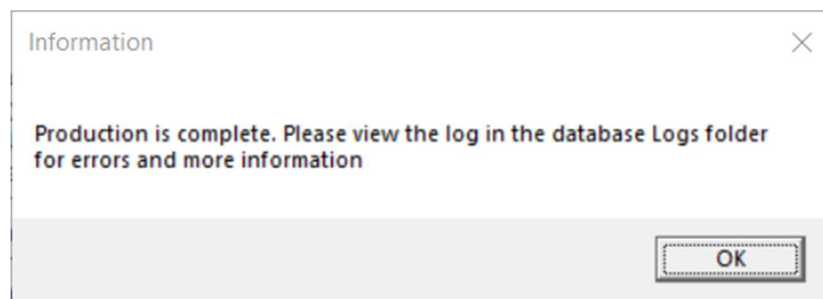


10. Verify selected MARKUPS (Redaction) and HEADERS AND FOOTERS (Right-Footer “Highly Confidential” Left-Footer “Page ID”) appear on the preview. Click **OK** to close.

11. Scroll to the top of the CONCORDANCE PRODUCTION window, under **Settings** click **Save** to save the production settings.
12. Click **Start production**.
13. The **CONCORDANCE PRODUCTION** status window appears indicating the production is going.



14. When the production is complete, an Information window appears. Click **OK** to close.



Activity: Reviewing the Production Log File

Each production creates a log file about the production output. The production log file is located in the Logs folder in the Concordance Database directory.

1. Navigate to where your Concordance Database directory resides, **C:\Concordance Databases\ConcordancePOCDemo\Logs**.

> This PC > OS (C:) > Concordance Databases > ConcordancePOCDemo > logs

Name	Date modified	Type	Size
CONCORDANCEPOCDEMO 2024-12.LOG	12/28/2024 9:10 AM	Text Document	3 KB
CONCORDANCEPOCDEMO 2025-01.LOG	1/8/2025 8:54 AM	Text Document	1 KB
IMGPRODlog_01_07_2025_08_08_03.log	1/7/2025 8:15 AM	Text Document	1 KB
IMGPRODlog_01_07_2025_09_31_54.log	1/7/2025 9:34 AM	Text Document	27 KB
IMGPRODlog_01_07_2025_10_24_16.log	1/7/2025 10:29 AM	Text Document	28 KB
IMGPRODlog_01_07_2025_10_33_18.log	1/7/2025 10:38 AM	Text Document	49 KB
IMGPRODlog_01_07_2025_16_52_13.log	1/7/2025 4:58 PM	Text Document	27 KB
IMGPRODlog_12_20_2024_12_09_45.log	12/20/2024 2:27 PM	Text Document	14 KB

- The production log is identified as IMGPRODLog<datetimegenerated>.log. To review the log, open in any text editor program.

```

IMGPRODlog_01_08_2025_09_39_44.log - Notepad
File Edit Format View Help
2025-01-08 09:43:01.3432 Production process started
2025-01-08 09:43:02.0764 Concordance Production - Version 10.25.1.14

2025-01-08 09:43:02.4978 Parameter settings for the current run
  Create Production Number : True
    Production Number Prefix : SMALLSAMPLE-
    Production Starting Number : 00001
    Production Number Suffix : False
    Production Number Field :
  Begin Production Number Field : BEGPRODNO
  End Production Number Field : ENDPRODNO
  Production Number Copy Mode : Append
  Use ProductionNumbers For MediaKeys : True
  Use ProductionNumbers For FileNames : True
  Create Placeholder For Unsupported : True
  Create Volume Folders : True
  Volume Folder Prefix : SMALL
  Volume Folder Starting Number : 0001
  Volume Folder Max VolSize : 10GB
  Create File Folders : True
  Create File Folders :
  File Folder Starting Number : 001
  File Folder Max Record Count : 1000
  Image Base Creation Mode : None
  Production Path : C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES
  Create Opt : True
  Selected Markups : Redactions
  Opt file name : C:\ConcordanceProduction\POCSMALLSAMPLE\DATA\SMALLSETOPT.opt
  File Type : TIFF
  Page Settings : Single-page
  Color Settings : Black and white CCITTFA4 compression
  FitImage Inside Headers Footers : True
  Include Headers AndFooters : True
    Left Header : None
    Center Header : None
    Right Header : None
    Left Footer : HIGHLY CONFIDENTIAL
    Center Footer : None
    Right Footer : Page ID
  Left Margin Top : None
  Left Margin Center : None
  Left Margin Bottom : None
  Right Margin Top : None
  Right Margin Center : None
  Right Margin bottom : None
  Headers and Footers Font Name : Arial
  Headers and Footers Font Style : 0
  Headers and Footers Font Size : 12
  WaterMark : None
  CreateScrubText : True
  ScrubText Output Folder : C:\ConcordanceProduction\POCSMALLSAMPLE\TEXT
  OCR all production documents : False
  ScrubText Extracted Text Field : OCR1
  ScrubText Writeback Needed : True
  ScrubText Writeback Field : PRODTXT

2025-01-08 09:43:11.2531 EDRN-EMAILSETS_000001-00001 SMALLSAMPLE-00001 SMALLSAMPLE-00001 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00001.TIFF PRODUCED
2025-01-08 09:43:11.2531 EDRN-EMAILSETS_000001-00001 SMALLSAMPLE-00001 SMALLSAMPLE-00001 C:\ConcordanceProduction\POCSMALLSAMPLE\TEXT\SMALL0001\001\SMALLSAMPLE-00001.txt TEXT FILE CREATED BY SCRUB TEXT
2025-01-08 09:43:11.2531 EDRN-EMAILSETS_000008-00001 SMALLSAMPLE-00002 SMALLSAMPLE-00004 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00002.TIFF PRODUCED
2025-01-08 09:43:11.2531 EDRN-EMAILSETS_000008-00001 SMALLSAMPLE-00002 SMALLSAMPLE-00004 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00003.TIFF PRODUCED
2025-01-08 09:43:11.2702 EDRN-EMAILSETS_000008-00001 SMALLSAMPLE-00002 SMALLSAMPLE-00004 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00004.TIFF PRODUCED
2025-01-08 09:43:11.2702 EDRN-EMAILSETS_000008-00001 SMALLSAMPLE-00002 SMALLSAMPLE-00004 C:\ConcordanceProduction\POCSMALLSAMPLE\TEXT\SMALL0001\001\SMALLSAMPLE-00002.txt TEXT FILE CREATED BY SCRUB TEXT
2025-01-08 09:43:11.2702 EDRN-EMAILSETS_000033-00001 SMALLSAMPLE-00005 SMALLSAMPLE-00007 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00005.TIFF PRODUCED
2025-01-08 09:43:11.2702 EDRN-EMAILSETS_000033-00001 SMALLSAMPLE-00005 SMALLSAMPLE-00007 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00006.TIFF PRODUCED
2025-01-08 09:43:11.2702 EDRN-EMAILSETS_000033-00001 SMALLSAMPLE-00005 SMALLSAMPLE-00007 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00007.TIFF PRODUCED
2025-01-08 09:43:11.2832 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00008.TIFF PRODUCED
2025-01-08 09:43:11.2832 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00009.TIFF PRODUCED
2025-01-08 09:43:11.2832 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00010.TIFF PRODUCED
2025-01-08 09:43:11.2832 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00011.TIFF PRODUCED
2025-01-08 09:43:11.2832 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00012.TIFF PRODUCED
2025-01-08 09:43:11.2992 EDRN-EMAILSETS_000039-00001 SMALLSAMPLE-00008 SMALLSAMPLE-00013 C:\ConcordanceProduction\POCSMALLSAMPLE\IMAGES\SMALLSAMPLE-00013.TIFF PRODUCED
2025-01-08 09:43:12.2992 Production process ended
2025-01-08 09:43:12 SMALLSAMPLE-00003 SMALLSAMPLE-00005 SMALLSAMPLE-00005 C:\ConcordanceProduction\POCSMALLSAMPLE\TEXT\SMALL0001\001\SMALLSAMPLE-00005.txt TEXT FILE CREATED BY EXPORTING TEXT
2025-01-08 09:43:12 SMALLSAMPLE-00004 SMALLSAMPLE-00008 SMALLSAMPLE-00008 C:\ConcordanceProduction\POCSMALLSAMPLE\TEXT\SMALL0001\001\SMALLSAMPLE-00008.txt TEXT FILE CREATED BY EXPORTING TEXT

```

- The Production log is comprised of three primary sections:

- a. Date and Time started along with the version of Concordance used during the production.
- b. Production Settings.
- c. Line item for each produced file. Single page image output will show each page as its own line, multi-page will only have one line item. Each produced text file has a line item and indicates how the text file was created: Scrub Text (OCR'd at production) or Exported Text (created from the selected field).

Activity: QC Your Production Results

Performing quality control on the produced files is an important step in your workflow. As a best practice, you will want to:

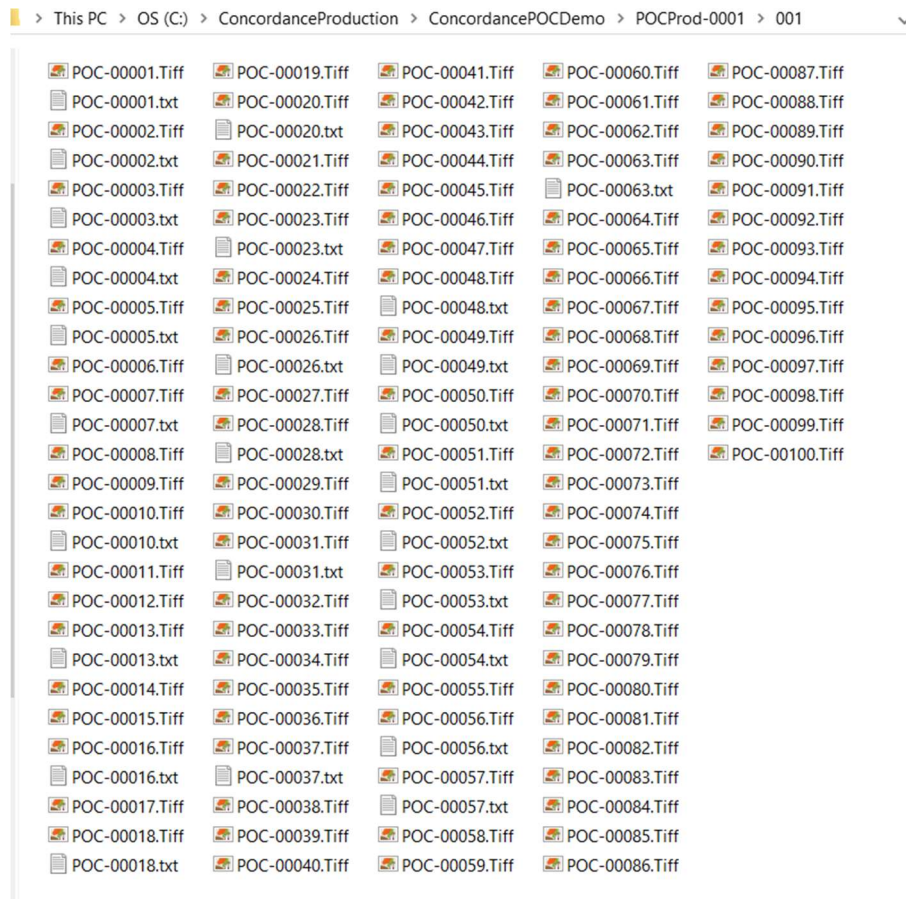
- Verify record counts – The number of records selected for production should match the number of documents produced.
 - Multi-page productions: Record and File Counts should match exactly.
 - Single-page productions: Expected number of files, based on the page count is produced.
 - Text files: The number of text files produced matches the records selected for production.
- Confirm redactions are applied.
- Confirm scrubbed text.
- Review the load file.

1. Navigate to your Production Path, C:\ConcordanceProductions\ConcordancePOCDemo. You should see an opt file and the POCProduction-0001 folder.

📁 > This PC > OS (C:) > ConcordanceProduction > ConcordancePOCDemo

Name	Date modified	Type	Size
📁 POCProduction-0001	1/8/2025 11:15 AM	File folder	
📄 ConcordancePOCDemo.opt	1/8/2025 11:15 AM	OPT File	13 KB

2. Select the POCProduction-0001 folder. The Volume folder, POCProd-0001 is next. Open the volume folder.
3. The File Folders are next, you should see a 001 folder. Open the 001 folder.



4. In the folder are the produced files, based on production settings. You should have:
 - a. A total of 126 Tiff and txt files.
 - b. 100 single-page Tiff files named incrementally, starting at POC-00001 to POC-00100.Tiff.
 - c. 26 multi-page text files named by the beginning production number for each document.
5. Open the first Tiff, POC-00001 to view the produced image. The image shows the Redactions and Footers applied as you saw in the Preview.
6. Open the first text file, POC-00001. In the text file, you should see where redacted text was scrubbed during OCR with the Redaction reason in its place.

Confidential

Jeb, primero que todo el felicitarte por el ejemplo que estas dando en tu viaje por los paises Asiaticos, al hablar del rezo y de tus preocupaciones espirituales nos envias a todos un mensaje de fe y alivio dentro de este marco tan horrible de problemas por el cual esta pasando esa parte del mundo.

Lo segundo es que necesito me orientes sobre con quien debo reunirme en el Departamneto de Educacion en Tallahassee al cual le pueda explicar el programa de Florida Venture Foundation, en el cual estamos rescatando dia a dia ninios en sus dos ultimos anos de High School que no van a continuar su educacion en el College y lo involucramos en la industria de la construccion, como te explique la ultima vez que hablamos sobre este tema las dificultades de conseguir fondos para un programa tan especial cada dia se hacen mas dificiles, pero yo se que esta es una de las prioridades que tanto tu como tu hermano hablan de ella dia a dia y quieren hacer algo por resolver, estos programas son un win- win desde todos los puntos de vistas, 1) Creas una fuerza laboral local o Estatal. 2) El dinero que estos trabajadores reciben queda en nuestra economia y no va a otros Estados 3) Con la gran demanda que tiene la industria en estos momento es la unica manera de hacerle frente al problema sin traer trabajadores indocumentados e ilegales a trabajar en nuestra industria.

Tambien en mi ultimo correo electronico te hablaba de venir al almuerzo mensual de la L.B.A. en calidad de Orador Principal y nadie me ha llamado para coordinar tu agenda con alguno de los proximos almuerzos.

Bueno no te tomo mas tiempo, que DIOS te acompañe y ayude a continuar esta excelente labor que llevas a cabo dia a dia.

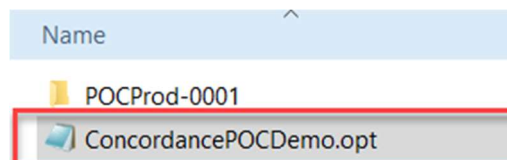
Redacted

7. Continue to review the produced images and text to see the images with redactions and confirm the corresponding text files have been scrubbed.

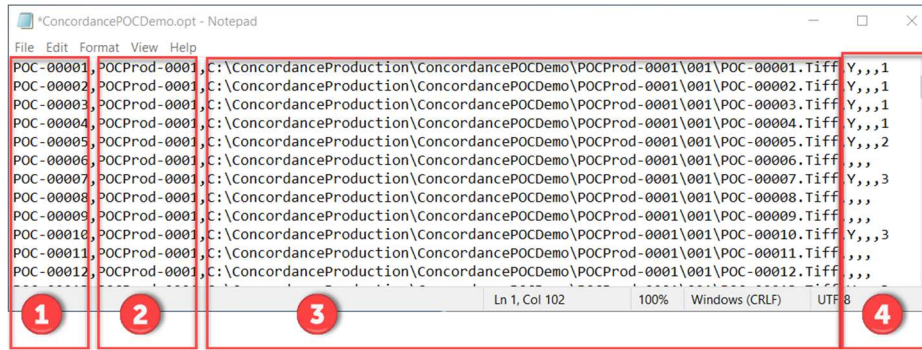
Review the OPT file

When you are done reviewing files, return to the root of the production folder to view the OPT load file. The OPT file provides instructions to applications like Concordance for loading images. Any text editor program (Notepad, Notepad++, Ultra Edit, Text Pad, etc) can be used to open the OPT file.

On the root of the production output folder, you should see the ConcordancePOCDemo.opt.



Double-click to open the file with the associated application or right-click to select your text editor program. In the example below, Notepad is used.



The OPT File

1. **MediaKey (ImageKey):** The media key is the Document (multi-page) or Page (single-page) ID for the image. The **Use production numbers for media keys** option must be enabled for this field to be updated with the production numbers. If not selected, the Concordance Database's existing Starting Number is used.
2. **Volume:** The Volume for the production, as set in the Production window – Output Settings – Volume folders. This will be empty if Volume folder is not selected.
3. **File Path:** Path to the produced file.
4. **Document Break:** New documents are identified with a Y followed by three commas and the Page Count. In Single-Page image productions, the starting page of a document shows the Document Break (Y) and the number of pages in the document. For each page in the image, a line item is created without the Document Break and Page Number entries.

OPT Load File Format

MediaKey,<optional Volume>, path\filename, Y (DocStart),<empty>,<empty>,<empty>,TotalPage (empty if not document start).

A hard return must follow the last line item in the OPT file.

CONCLUSION: CONCORDANCE POC

Congratulations! You have completed the Concordance POC. This POC was designed as a self-paced demo to walk you through a simple Concordance Workflow introducing you to some of the features and functionality of Concordance. We encourage you to visit the [Concordance Answer Center](#) for more detailed information on how to use Concordance to fulfill your discovery review needs.