

Litigation Services

Concordance® Navigation



LexisNexis® Concordance®
Training Module

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Research | Analytics | E-discovery | Compliance




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Concordance® Free Training

- LexisNexis® Concordance® provides complimentary training modules addressing common user and administrator software functions
 - Requires Windows Media Player
 - Requires speakers or headphones for audio
- Concordance® software not required
 - Concordance® 30-day trial version available for free download
- Handouts available for download
- Training Module Support
 - E-mail ConcordanceTraining@LexisNexis.com
 - Call (425) 463-3503

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Agenda

- Why Concordance®?
- Launching Concordance®
- The Concordance® Window
- Opening a Database
- Viewing Document Records
 - Browse View
 - Table View
- Viewing Images
- Viewing Linked Files

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Why Concordance®?

- Litigation Database Software
 - Manage paper documents, electronic discovery, transcripts and pleadings involved in litigation
 - Identify key documents for trial
 - Prepare witness kits
 - Organize responses to document production requests
 - Create chronology reports
 - Generate deposition digests
- Capacity

Each Database	Maximum of 0.5 Terabytes of Data Equivalent to over 33 Million Document Records
Each Record	Maximum of 250 Custom Fields
Each Field Entry	Maximum of 12 Million Characters (Paragraph Field)
Joined Databases	Maximum of 128 Databases can be Joined Giving a Total Capacity of 64 Terabytes of Data or over 4 Billion Document Records
Average Database	1 Million Document Records

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Why Concordance®?

- Speed
 - Index-based full-text searching
 - Powerful and flexible search tools
- Collaboration
 - Easy-to-use review and annotation features
 - Ability to share analysis with your team
- Share Data with Other Industry-Leading Applications
 - CaseMap
 - LAW
 - Total Litigator
- State-of-the-Art Security
- Access Data via the Internet with Concordance® FYI™

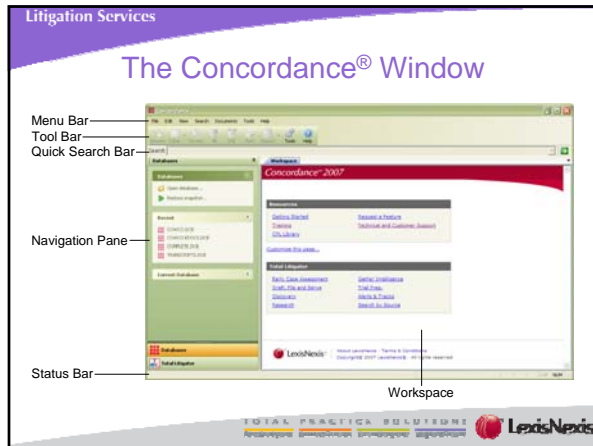
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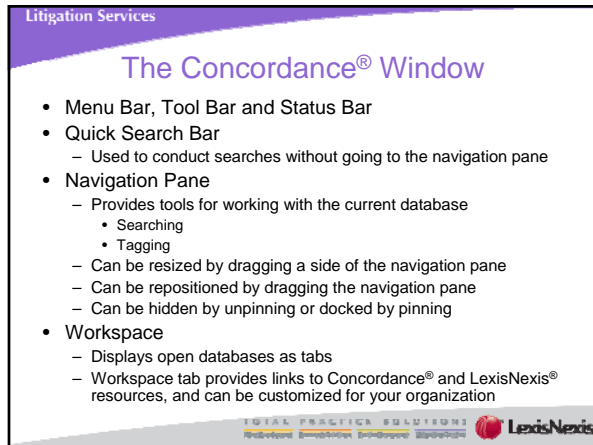
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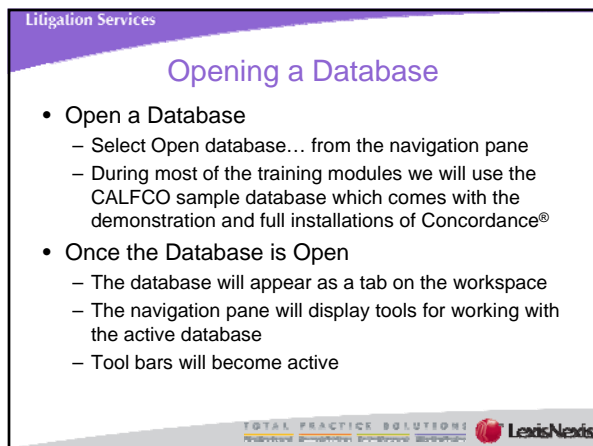
Launching Concordance®

- Double-click the Concordance® icon on your desktop
- or**
- Select Start > All Programs > LexisNexis > Concordance 2007 > Concordance 2007 from the Windows Task Bar

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Browse View

- Displays one document record at a time; used to view full details about your documents
- Each item listed in the browse view is a field in the database
- Navigation buttons on the lower tool bar allow users to move from document to document
- The status bar identifies location within the record collection

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Browse Options

- Tools > Empties can be used to display all fields or hide empty fields
- Right-Click Options
 - Change font
 - Print
 - View images or linked files
 - Send data to other applications
- View > Split screen options allow multiple views to be displayed in the workspace simultaneously

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Table View

- Displays a list of document records
- Used to obtain an overview of the documents
- Use the Browse and Table views together to scan a list of document records and select specific documents for more in-depth analysis

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Table Options

- Table Layout
 - Fields can be added, removed or rearranged by selecting Table layout... from the drop down menu next to the Table button on the tool bar
 - In the Table Layout dialog box double-click a field to move it from one list to the other, and drag fields to reposition them in the list
- Sorting
 - Sort by clicking on the desired field header
 - Beginning sort order is always the import order, often matching the document number order
 - One click sorts ascending; second click sorts descending

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Table Options

- Right-Click Options
 - Customize table layout
 - Change font
 - View images
 - Tally the contents of a field
 - Send data to other applications
- Selecting Multiple Documents
 - Click-Shift-Click to select adjacent records
 - Click-Ctrl-Click to select non-adjacent records
- Send to Excel
 - Sends displayed fields for select records to an Excel spreadsheet
 - Excel trims leading zeros off numeric Bates numbers

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Viewing Images

- View Image Button
 - Click the View Image button on the lower tool bar
- Right-Click
 - Right-click in the Browse view and select View image from the pop-up menu
- Jump to a Specific Page
 - Highlight a document number in the Browse view, right-click, and select View image from the pop-up menu

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Viewing Linked Files

- Linked files often appear in databases containing electronic discovery
 - The link allows users to open the document in its native/original file format
 - Requires users have access to software necessary to view the linked file
- File links appear as highlighted text in the Browse view
- To view linked files
 - Click on the highlighted text
 - or
 - Right-click on the highlighted text and select Run attachment from the pop-up menu

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Concordance® Free Training

- Concordance® User
 - Searching
 - Tagging
 - Concordance® Image
 - Working with eDiscovery and Transcript Databases
- Concordance® Integration
 - CaseMap
- Concordance® Administrator
 - Database Creation and Customization
 - Importing Data
- Concordance® FYI™ Reviewer
- Concordance® FYI™ Administrator

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CU02 – Concordance® Navigation Self Assessment

1. Concordance® can be used to...
 - A. Manage paper documents, electronic discovery, transcripts and pleadings
 - B. Identify key documents for trial
 - C. Prepare witness kits
 - D. Organize responses to document production requests
 - E. Create chronology reports
 - F. Generate deposition digests
 - G. All of the above
2. True or False – The Navigation Pane can be hidden by clicking the pin icon in the upper right corner of the Navigation Pane.
3. When would the Browse view be preferred over the Table view?
 - A. When you need to see all your previous searches
 - B. When you need to view document records in context of neighboring documents
 - C. When you need to quickly sort a set of document records
 - D. When you need to read an entire document record
 - E. B and C
4. When would the Table view be preferred over the Browse view?
 - A. When you need to see all your previous searches
 - B. When you need to view document records in context of neighboring documents
 - C. When you need to quickly sort a set of document records
 - D. When you need to read an entire document record
 - E. B and C
5. While in the Browse and Table views, the _____ Bar identifies your location within the current set of document records.
6. To customize the layout of the Table view...
 - A. Click the drop-down arrow next to the Table button, and select Table layout... from the menu that appears
 - B. Click on a field header in the Table view and drag the field to a desired position
 - C. Right-click in the Table view, and select Layout > Table layout... from the menu that appears
 - D. All of the above
 - E. A and C
7. True or False – The only way to display an image associated with a document record in Concordance® is to click the View Image (camera) button.

CU02 – Concordance® Navigation

Self Assessment – Answer Key

1. Concordance® can be used to...
 - A. Manage paper documents, electronic discovery, transcripts and pleadings
 - B. Identify key documents for trial
 - C. Prepare witness kits
 - D. Organize responses to document production requests
 - E. Create chronology reports
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2. **True** or False – The Navigation Pane can be hidden by clicking the pin icon in the upper right corner of the Navigation Pane.
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 - C. When you need to quickly sort a set of document records
 - D. When you need to read an entire document record
 - E. B and C
5. While in the Browse and Table views, the _____ **Status** _____ Bar identifies your location within the current set of document records.
6. To customize the layout of the Table view...
 - A. Click the drop-down arrow next to the Table button, and select Table layout... from the menu that appears
 - B. Click on a field header in the Table view and drag the field to a desired position
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 - D. All of the above
 - E. A and C
7. True or **False** – The only way to display an image associated with a document record in Concordance® is to click the View Image (camera) button.