

Concordance® FYI Reviewer Quick Reference

1. Title Bar

Displays the current database name and information regarding the current document record.

2. Workspace Tool Bars

A. Standard Toolbar

Contains buttons that let you access the Concordance views and tools.

B. Image Toolbar

Contains buttons that let you view and annotate images in Concordance.

3. Navigation Pane

Provides tools for performing tasks on the current database, such as searching and tagging.

C. Task Pane

Displays database tools; divided into work areas called panels.

D. Navigation Buttons

Opens task panes on the navigation pane. The Search, Tags, Notes, and Sort buttons are visible once a database is opened.

4. Workspace

Displays databases in various views.

E. Table View

Displays a list of document records.

F. Browse View

Displays one document record at a time.

G. Concordance Image

Image viewer is embedded within the browser window.

5. Dynamic Toolbar

Contains buttons for tools corresponding to the current views: document navigation, search hit navigation, view document image, copy, and font.

6. Status Bar

Displays status information, such as current document record count. The number in brackets is the document's location in the database.

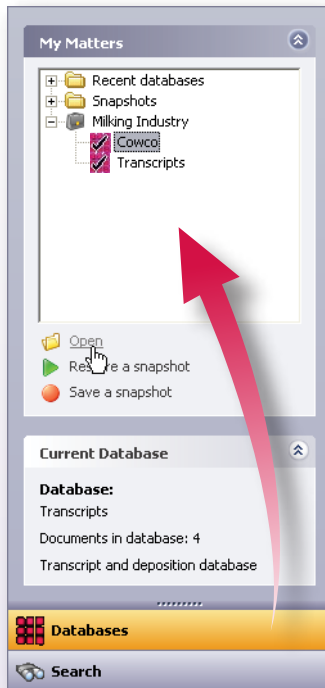
Opening a Database

To open a Concordance database:

- 1 Click the **Databases** navigation button to open the **My Matters** task pane.
- 2 Click the **[+]** sign next to the Matter that contains the database you would like to open.
- 3 Select the desired database from the list and then click **Open**.

Your selected database will open in the workspace on the right of your screen.

Note: To concatenate two or more databases, select the red database icons. (You will see a check mark next to each selected database, as shown). Then select **Open**.



Opening a database in the **My Matters** task pane

Viewing Document Records

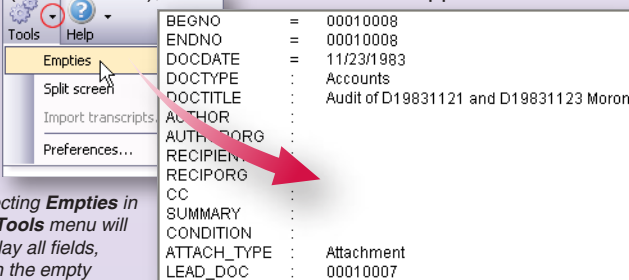
View document records for the current database by selecting the **Browse** and **Table** buttons from the standard tool bar. Use the navigation buttons, **First**, **Previous**, **Next** and **Last**, on the **Browse** tool bar to move from document record to document record.



The **Tools** button drop-down menu allows multiple views to be displayed in the workspace simultaneously, arranged left/right or top/bottom.

A. Browse View Options

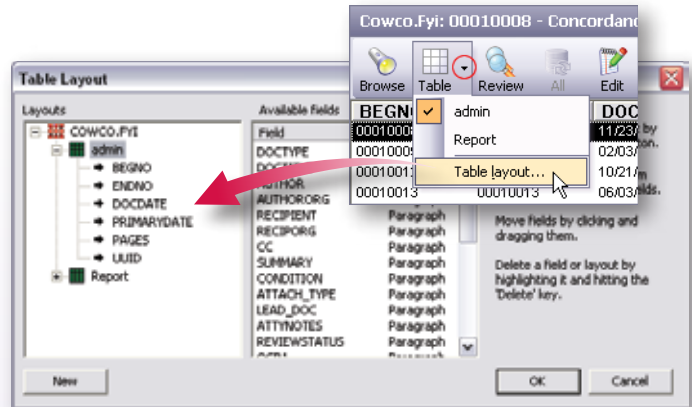
- **Empties** – The **Tools** button drop-down menu > **Empties** option can be used to display all fields or hide empty fields.
- **Right-Click Options** – Right-click to change font, print, add or edit notes, view images or linked files (attachments), and send data to other applications.



Selecting **Empties** in the **Tools** menu will display all fields, even the empty fields, as shown.

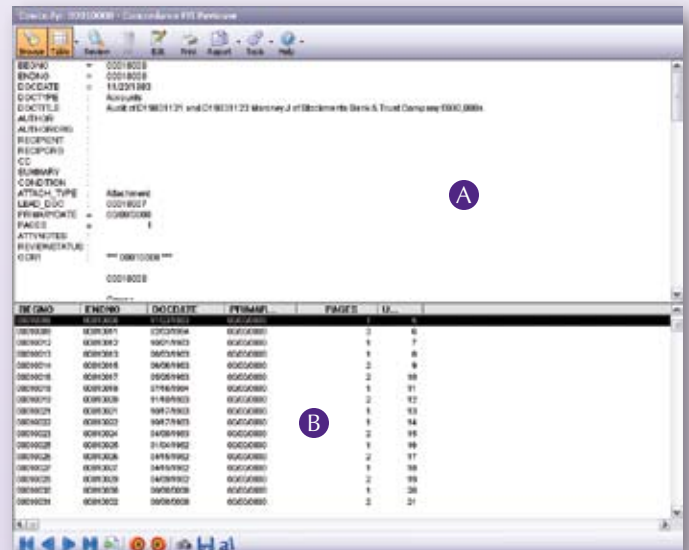
B. Table View Options

- **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 standard 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.



Customize your Table View in the Table Layout dialog box

- **Column Width** – Drag the column header dividers to resize column widths.
- **Sorting** – Sort by clicking on the desired field header. Sort on multiple fields by using the **Sort** task pane.
- **Selecting Multiple Document Records** – **Shift+Click** to select adjacent records. **Ctrl+Click** to select non-adjacent records.
- **Right-Click Options** – Right-click to customize the table layout, change the font, view images, tally the contents of a field, and send data to other applications.
- **Send to Excel®** – Sends displayed fields for select records to an Excel spreadsheet.



Concordance main workspace with main toolbar buttons

TIP! Your **Table View** settings are customizable in the **Table Layout** window. Go to: **Table** button drop-down arrow > **Table layout**

Viewing Images and Linked Files

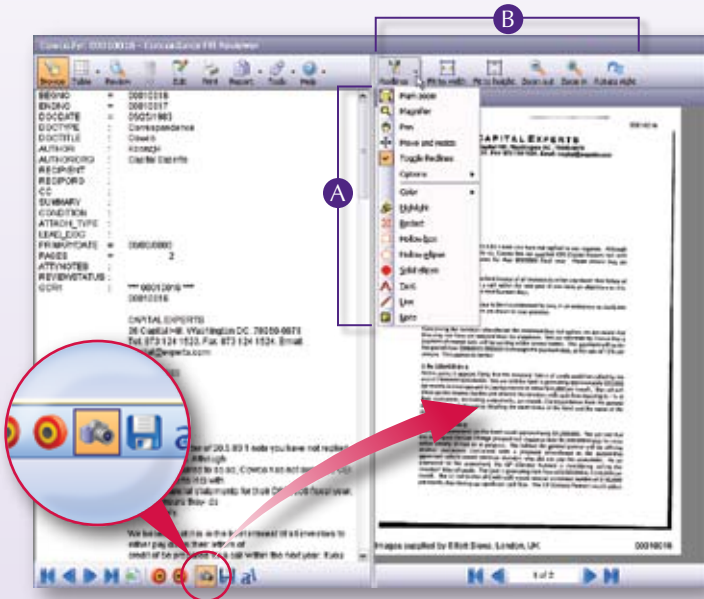
Viewing Images

View document images by clicking the **View Image** button on the **Browse** or **Table** tool bar. You can jump to the image of a specific page by highlighting a page number in the text of the **Browse** view, right-clicking, and selecting **View image** from the pop-up menu.

A. Redline Button Menu

The **Redline Button** drop-down menu provides the drawing tools you will need to highlight, redact, annotate, and place notes in your documents. The Redline tools include:

- Mark Zoom
- Magnifier
- Pan
- Move and resize
- Toggle Redlines
- Options ▶ Sticky rotate, Sticky zoom, Invert, Preferences...
- Color ▶ Color pallet
- Highlight
- Redact
- Hollow box
- Hollow ellipse
- Solid ellipse
- Text
- Line
- Note



Click the View Image button (camera) to view document images

B. Redline and View Toolbar Buttons

The **Redline** and **View** toolbar buttons provide the drawing tools mentioned above, but also these image view tools:

- Redlines (mentioned above)
- Zoom out
- Fit to width
- Zoom in
- Fit to height
- Rotate right

Viewing Linked Files (Attachments)

Linked files often appear in databases containing electronic discovery. The link allows users to open the electronic document in its native/original file format. File links appear as highlighted text in the **Browse** view. To view linked files click the highlighted text.

Example of highlighted FilePath for a linked Word® document file:

<C:\Program Files\LexisNexis\Concordance\Tutorial\Class Exercises\EDocs\AcmeInsPropSale.doc>

Tagging

Tags are markers that can be applied to a document record in order to categorize the document. In a “paper environment,” tags are the equivalent of flagging a document with a colored Post-it® note, or photocopying an important document and filing it separately. Tags can be used to categorize documents for any purpose:



Tags task pane

- **Responsive Status** – to identify documents that must be produced as part of a discovery request
- **Privilege Status** – to identify documents containing privileged information that shouldn’t be produced
- **Witnesses** – for creating witness kits or witness binders
- **Issues** – to identify documents supporting or contradicting arguments made in the complaint
- **Exhibits** – to identify documents that will be used as exhibits in depositions or at trial
- **Keywords** – to identify documents containing important terms found in the complaint
- **Reviewer Assignments** – to delegate review responsibilities and track reviewer statistics

Tags are created by right-clicking in the **Tags** task pane, selecting **New > Tag** from the pop-up menu, and giving the tag a name. Apply that tag to one or more documents by selecting the documents and checking the tag box. Search to find all documents with a particular tag by right-clicking on the tag and selecting **Create query from tag(s)**.

Group similar tags by creating a folder in the **Tags** task pane and adding tags to that folder. First, right-click in the **Tags** task pane, select **New > Folder**, and give the folder a name. Then add new tags to that folder by right-clicking on that folder, and selecting **New > Tag**. Personal folders can also be created, and only viewed by the user who created them.

Notes

Portions of documents can be selected and tagged or annotated by highlighting the desired text, right-clicking on the highlighted text, and selecting **New Note**. Add issue tags and notes in the dialog box that appears. Issues are tags applied to a selected block of text and display in the **Tags** task pane as red text. Notes added to a document can be viewed from the **Notes** task pane, and are searchable from the **Advanced Search** task pane.




Notes task pane

Concordance® FYI Reviewer *Quick Reference*

Searching

Simple Search

The **Simple Search** panel allows you to perform straightforward searches on the full text of the database.

- Enter your search terms in the appropriate boxes, and then click the **Search** button.
- Search results will appear in the **Browse** and **Table** views. In the **Browse** view the terms searched will be highlighted.
- Navigate from one highlighted term to the next by clicking **Next Hit** or **Previous Hit** from the **Browse** tool bar. 

Advanced Search

Create more complex searches in the **Advanced Search** panel using the Concordance search language.

- Enter your search criteria, and then click the **Search** button to execute the search.
- Statistical results for the search will be displayed under **Results**.
- The **Browse** and **Table** views will display the document records resulting from your search.

Full Text Search

Full Text searching uses an index of every unique term within the database, resulting in fast searches. Ten full text search operators in three categories are available – Boolean, Context, and Proximity – allowing you to create complex and targeted full text searches.

Concordance (Con) vs Concordance FYI Reviewer (FYI)		
Features	Con	FYI
User Interface		
Menu Bar - (FYI has some of these functions)	✓	
Standard Toolbar	✓	✓
Navigation Pane Auto-hide Pin	✓	
Concatenation	✓	✓
Embedded Concordance Image viewer		✓
Workspace Tabs	✓	
Task Panes		
Databases	✓	✓
Search	✓	✓
Tags	✓	✓
Notes	✓	✓
Sort	✓	✓
Total Litigator	✓	
Administration		
Added Menu Items	✓	
Security	✓	

Additional Full Text Search Tools



Fuzzy Searches –

- Click **Display a list of words that sound like the selected word** to conduct a fuzzy search. A list of similar words found in the database will appear.
- Use **Ctrl+Click** or **Shift+Click** to select the desired terms, and then click **OK**. A search for the selected terms will be created in the **Advanced Search** panel.

Wildcard –

- Use the asterisk (*) to represent one or more characters at the beginning or end of a search term. For example, financ* finds finance, finances, financial, financing, etc.

Relational Searching

Relational searching allows you to locate documents in the database by performing a comparison. It works best with numeric, date, and fixed length text fields. Ten relational search operators are available in Concordance. These operators compare your search criteria with the contents of the field specified in your search.

Reviewing Searches

- To view a list of all searches conducted during your session, click the **Review** button on the standard tool bar.
- To recall a previous search double-click on the search from the list.

Concordance (Con) vs Concordance FYI Reviewer (FYI)		
Features	Con	FYI
Tools		
Empties	✓	✓
Check for Duplicates	✓	
Manage List Files, Manage Tags / Issues	✓	
Replication	✓	
Split Screen	✓	✓
Import Transcripts	✓	✓
Preferences		
General (differences between FYI and Con)	✓	✓
Search	✓	✓
Browsing	✓	
Wizards	✓	
Viewer (differences between FYI and Con)	✓	✓
Viewer - Redlines		✓
Indexing	✓	
CPL	✓	