Veritas eDiscovery Platform™

Load File Import Guide

10.1

VERITAS™

Veritas eDiscovery Platform™: Load File Import Guide

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Load File Import Guide

The Load File Import Guide provides case administrators of the Veritas E-Discovery Platform with details on how to prepare, analyze, and import load file data. This guide also provides details on how to handle various file types and third party import content, and describes tasks, best practices, and troubleshooting techniques associated with advanced load file import.

This section contains the following sections:

- *"About This Guide" in the next section*
- *"Revision History" on page 6*
- *"Technical Support" on page 8*
- *"Documentation" on page 8*
- *"Documentation Feedback" on page 8*

About This Guide

As a supplement for case administrators, and a companion to the Case Administration Guide, the Load File Import Guide is intended to help you understand the Pre-Processing feature in greater detail, and how to employ best practices for performing imports of third party load files.

Note: You must have the Case Administrator role, or have appropriate administrator permissions to perform load file imports and tasks. Refer to the *"Case Administration Guide"* for more information.

Revision History

The following table lists the information that has been revised or added since the initial release of this document. The table also lists the revision date for these changes.

Revision Date	New Information
December 2021	• Updated version for release 10.1
March 2021	• Minor edits
March 2020	• Minor edits
October 2018	• Minor edits
June 2017	• Minor edits
July 2016	• Branding and minor edits
August 2015	• Remove Rights Management Guide
March 2015	• Image accessibility • Branding and minor edits
October 2014	• Pre-Processing Load File report changed to Load File Discovery Errors report • Added auto-detection feature for file encoding on Formatting (Required) subsection menu • Added steps for adding load file encoding formats via property browser settings • Select mapping template option removed from Import Production menu • Removed option to create JPG from Loading Image Files Table 24 • Updated directory structure example with additional layer • File encoding UTF-8 removed from Table 7 • summary.xml file required when use the Veritas tagging syntax is checked • Updated screenshots • New screen shot for Step 3 under “Map Formats and Validate Load File” section • Added encoding formatting information, affecting Tables 15 and 16 • Minor edits and branding changes
June 2013	• Changes/Additions to Tables 1, 2, and 6 • Before You Import! expanded to include – Items are de-duped by the originating or exporting system – Distributed architecture restrictions – Upgraded case behavior for 7.1.2 and pre-7.1.2 cases • Release and minor edits
Sept 2012	• File size added as an importable field for Load File Sources • Load file template no longer includes the path of Opticon files • Global rename of Bates Number to Imported Number • Changes to format, product documentation list and minor edits
March 2012	• Changes to format and minor edits to content

Revision Date	New Information
Feb 2012	• Branding and minor formatting changes only
Nov 2011	• New guide—Documents new load file imports feature within the Processing module including: – adding a load file source to a case – mapping and validating formats – specifying load file options such as document relationships, identifiers, processing, file types, tags, folders, and custom fields – running a discovery job on the load file prior to processing – running a load file report to view errors and adjust settings

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Introduction to Load File Import

As of 7.0, the platform supports importing documents from load files (in either CSV or DAT format). This guide describes the load file specifications for loading images, text, native files, and metadata created from another source, such as production data provided to you.

Once loaded into the application, these records will appear in your case as additional reviewable items. You may also optionally mark these records as belonging to an outside production, so that you may include or exclude the associated documents from search and export based on that criterion.

About Load Files

An eDiscovery load file is a text file containing fielded data. Load files list information about documents, both about the document itself (such as the type of document, its original file name, where it can be found on disk) as well as metadata from the document. The information in the load file is used to load the document into a review tool along with its associated metadata.

Note: In this context, *document* refers to an individual item, not a document family.

Load File Format Guidelines

The platform imports load files with either CSV or DAT file extensions, and those associated with image load files in Opticon format. The load file itself should meet the following requirements (except where noted):

- (Optional) May have a header row as the first line
- Contain delimiters to identify columns in the file
- Supports default encoding formats of UTF-8, UTF-16, ASCII, or ISO-8859-1and attempts to detect other types of encoding formats. For load files that are encoded in formats other than the four defaults or if the platform has incorrectly identified the encoding format, you can use the property browser to add the encoding format to the system before adding the load file source to the case. See *"Load File Prerequisites" on page 29*.

  Note: Once the load file has been successfully added, the product automatically detects and displays the load file encoding format and indicates whether the encoding was one of the default encoding formats or if the property browser was used to add the encoding format to the system.
- End each line with the standard EOL character (\n)
- (Optional) May have delimiters to:
  - identify text within a field
  - break apart multiple values within a single field
  - indicate levels ("nested values") in tag or folder names in the file.

  Note: If you have text within the load file that contains within it a line break character to be used for displaying the text correctly in the application, you may indicate that value as well.

Typical Load File Character Elements

The platform supports several third party load file sources, such as Concordance, using the same or similar default delimiters, with some additional options available. Load files typically contain certain distinguishable format elements which are used by various third party sources with variations in how they are used. The data within the load file has common separators ("delimiters") which include:

- The **field separator**—character separating the columns in the load file. It is also referred to as the comma (,) though the separator does not have to be a comma. Other sources contain separators in ASCII (020), which is an unprintable character that frequently is shown as a white square.
- The **text qualifier**—character marking the beginning and end of each load file field. It is sometimes referred to as the quote ("), even though it does have to be a quote character. The default in other sources is ASCII (254) or þ.
- The **line break** or **new line**—character marking the end of a line within a field that contains extracted text or some other long text. This is used to format the text, when indexing text from a load file. A typical default in other sources for the line break or new line is ASCII (174) or ®.
- The **multi-value character** (*optional*)—character separating distinct values within a column, such as when several email addresses are in a "To" field. This character is often called the semi-colon (;) though it does not have to be a semi-colon. Another third party source default is ASCII (059) or ;.
- **Nested-values** (*optional*)—certain third party load files have an additional character to indicate nested values such as levels within a tagging structure. Another source's default: ASCII (092) or \. (Some sources do not have a default for this separator.)
- **Escape character** (*optional*)—the start character in a field which must be interpreted differently from the same character occurring alone. These are necessary only when any of the formatting characters appear in the content field. For example, when the "\" character is used as a field separator.

For a full list of all supported character types for each of these delimiters, see Table 16: *"Supported Character Formats" on page 35*.

Load File Formats

Encoding Formats

To ensure load files and Option files display and are interpreted properly, it is important that the platform know the correct encoding format of the files. The platform makes it easier to validate and automate this task and can also identify the origin of encoding input and associated errors. During the import production phase, the platform attempts to automatically detect the correct encoding for load and Opticon source files (provided the files were successfully added to the case).

Note: Prior to version 8.0, users had to manually select from four common encoding formats (UTF-8, UTF-16, ASCII, or ISO-8859-1) from a drop-down list.

In addition to the automatic detection of file encoding formats, you can also add or correct encoding formats with the Property Browser. This method can be very useful in a number of situations where:

- Incorrect encoding is detected during the import production phase and you need to correct it. For example, if your load file is encoded in ISO-8859-1 but for some reason it has been incorrectly detected to be UTF-8. You can correct the encoding to ISO-8859-1 with the property browser settings.
- No encoding is detected. A warning message with this text is displayed on the Import Production menu.
- There is a requirement to set and ensure that a particular encoding will be used for a load file.

See *"Load File Prerequisites" on page 29*.

Customizing Formats Using Load File Templates

As Case Administrator, you will be able to define the structure of your load file as well as map the data to the eDiscovery Platform's fields, map the data to custom user-defined fields, or to identify paths to images, text files, and/or native files for loading. As part of this process you can save these mappings as templates to use again for other cases on the appliance. See *"Save Settings as a Template" on page 61* and *"Use Load File Templates" on page 63*.

Before You Import!

- Be sure to check recommended file formats and minimum load file requirements, as shown in the load file examples in *"Import Best Practices" on page 13*.
- There is no de-duplication support for data imported via LFI. It assumes duplicated items are removed by the originating or exporting system before they are imported into the platform. Also, documents imported via LFI will not be de-duplicated against any existing documents previously processed in the eDiscovery Platform.
- In a distributed architecture environment, please note that Load File Import will only be able to import new documents if the case home (and only the case home) has been provisioned for processing with no other processing nodes.
- With the introduction of family and item tagging in 7.1.3, the platform allows you to retain legacy tagging behavior and also use item tagging. The system accomplishes this by maintaining a duplicate set of tags for your successfully restored or upgraded 7.1.2 and pre-7.1.2 cases that contain data from a load file import. There will be one tag set of family document tags to retain legacy behavior (for audit and tracking purposes), and another set of item tags which are available to load file imports of new case data.

Import Best Practices

This section describes what you should know before you import, including backing up your case, formats and requirements to consider, plus reviewing recommended settings.

Refer to the following topics in this section:

- *"Overview" on page 13*
  - *"Back Up Your Case" on page 14*
  - *"Load File Considerations" on page 14*
- *"Load File Structure and Format Examples" on page 16*
  - *"Document Structure" on page 16*
  - *"Formatting" on page 17*
  - *"Load File Fields (Example)" on page 18*
  - *"Document Relationships" on page 21*
  - *"Opticon File" on page 21*
- *"Recommended Import Settings (Example)" on page 22*
  - *"Document Relationships Settings" on page 22*
  - *"Identifiers Settings" on page 22*
  - *"Processing Settings" on page 23*
  - *"File Types Settings" on page 23*
  - *"Tags Settings" on page 24*
  - *"Folders Settings" on page 25*
- *"Minimum Requirements" on page 25*
  - *"Load File Field Requirements" on page 25*

Overview

When importing a CSV or DAT load file, the most important part of the process is choosing how you map fields and formats, and the options you select. This will have a direct impact on how the information is searched and analyzed during review. For example, carefully considering the relationships between documents, and processing options (such as image handling, indexable text and native file type mappings, search priority) can significantly affect what and how data is made available to case users during analysis and review.

Using these best practices, you can prepare your import files with the following methods in mind not only to ensure processing is successful, but that the information is appropriately searchable. See also *"Checking Load File Formats and Requirements" on page 69*.

Back Up Your Case

It is strongly recommended that you back up your case after discovery of the load file source is complete and prior to any processing. This is because while discovery may be initiated multiple times for a load file (for example, configuring and saving settings, encountering and fixing pre-processing errors, then rediscovering data), processing may only be done once. If processing fails, and remediation methods are unsuccessful, you can still restore the case with discovered data from a backup.

Load File Considerations

When you prepare a set of load files to be added to your case for processing, consider the following "checklist" of the most important items to consider first. This will help you quickly select the appropriate options and ensure your import job will be successful:

- There is no de-duplication support for data imported via LFI. It assumes duplicated items are removed by the originating or exporting system before they are imported into the platform. Also, documents imported via LFI will not be de-duplicated against any existing documents previously processed in the eDiscovery Platform.
- If the detected load file coding formats is not correct, the Property Browser can be used to set the encoding format. See *"Load File Prerequisites" on page 29*.
- Decide if a template should be created. See *"Step 2: Provide Source Information" on page 31*.
- Check the **relationship of your documents**. See *"Step 4: Specify Document Relationships" on page 36*.
- Determine your file types and how they should be identified. See *"Step 5: Define Identifiers" on page 39*.
- Check processing requirements for the following:
  - **image files**. Are there image files to link?
  - **indexable text**. Is there text content (indexable extracted text)? Where are the external text files?
  - **native file handling**. Do you want to use metadata from the load file for fields (without extracting from the native files)? Or extract metadata from the native files for the eDiscovery Platform fields (and add custom fields from load file)?

  See *"Step 6: Select Processing Options" on page 42*
- Check your search and review requirements. See *"Processing Effects on Analysis & Review" on page 49*.
  - **custom fields**. Do you have additional fields not commonly identified? Do you want reviewers to search and view data from custom fields? See *"Step 10b: Manage Custom Fields" on page 60*.
- Check **export** requirements. See *"Depending on load file settings, Analysis & Review displays file sizes that match mapped values from either the load file or native file." on page 49*.

Example: Triple A Load File

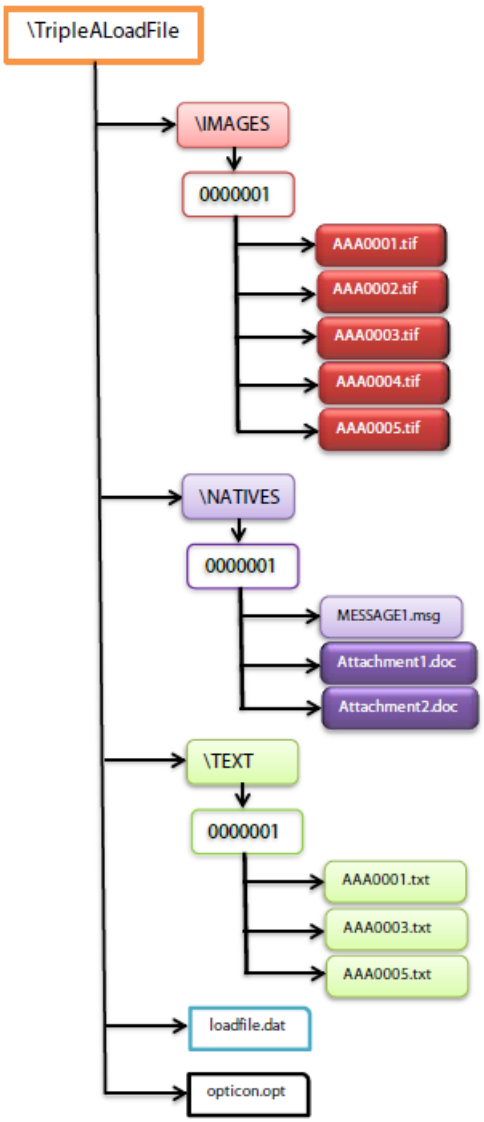
The following sections and subsections are based on sample data in the load file example "TripleALoadFile" which is used to describe preferred document structures, formats, and recommended settings to be used for import.

Load File Structure and Format Examples

Load files may vary greatly depending on third party software, or document makeup, and do not have to follow one specific format in order to be imported. However, it may save you time to refer to this example (and all related settings) as a guide for what is acceptable and/or recommended for use with the platform's Load File Import feature.

Document Structure

The following "TripleALoadFile" includes a document structure that contains folders for image files, native files, and text files, as well as the opticon and loadfile.dat files:



Example of document directory structure:

```
\TripleALoadFile
    \Images
        \0000001
            AAA0001.tif
            AAA0002.tif
            AAA0003.tif
            AAA0004.tif
            AAA0005.tif
    \Natives
        \0000001
            MESSAGE1.msg
            Attachment1.doc
            Attachment2.doc

    \Text
        \0000001
            AAA0001.txt
            AAA0003.txt
            AAA0005.txt
    \loadfile.dat
    \opticon.opt
```

In this example, there are a few important things to note regarding the included files:

- MESSAGE1.msg is a two-page email (AAA0001, AAA0002), ATTACHMENT1.doc is a two-page Word document (AAA0003, AAA0004), and ATTACHMENT3.doc is a one-page Word document (AAA0005).
- There is one TIF image file for every page of each document. These TIF files will be stitched together for the Native/Image view in review.
- There is one native file for each document.
- There is one text file for each document. The numbering of the text file aligns with the first Imported Number of the document.

Formatting

The application accepts load files in either CSV or DAT format with a large variety of file formatting settings. The following formats are based on data in "TripleALoadFile", which includes a DAT load file that uses a set of formatted fields and values.

Table 1: "TripleALoadFile" Example: Format Settings (DAT File)

Field	Value
Field Separator	¶(20)
Text Qualifier	Þ(254)
Nested Value Separator	\ (92)
Newline	\n (10)
Multi-Value Separator	; (59)
Escape Character	[None]
File Encoding	UTF-8

Load File Fields (Example)

The example load file contains the following fields:

Table 2: "TripleALoadFile" Example: Load File Fields

Field	Value	Example Email	Example Attachment
BEGDOC	Imported Number for the first page of the document.	AAA0001	AAA0003
ENDDOC	Imported Number for the last page of the document. This value may be the same as BEGDOC	AAA0002	AAA0004
BEGATT	Imported Number for the first page of the first attachment. This value may be the same as BEGDOC if there are no attachments.	AAA0003	(n/a for attachments)
ENDATT	Imported Number for the last page of the last attachment. This value may be the same as ENDDOC if there are no attachments.	AAA0005	(n/a for attachments)
TO	Recipient(s) of the email, separated by the multi-value separator.	Susan Qu <squ@company.com>; Robert Hahn <rhahn@company.com>	(n/a for attachments)
FROM	Sender of the email.	John Doe <jdoe@company.com>	(n/a for attachments)
CC	Carbon-copied recipient(s) of the email, separated by the multi-value separator.	Review Team <revteam@company.com>	(n/a for attachments)
BCC	Blind-carbon-copied recipient(s) of the email, separated by the multi-value separator.	jdoe@personalmail.com	(n/a for attachments)
SUBJECT	Subject of the email.	Follow-up from our meeting	(n/a for attachments)
DATESENT	Date the email was sent - in this example, the format is "MM/dd/yyyy".	03/32/2010	(n/a for attachments)
TIMESENT	Time the email was sent - in this example, the format is "hh:mm:ss a".	11:34:20 AM	(n/a for attachments)

Table 2: "TripleALoadFile" Example: Load File Fields

Field	Value	Example Email	Example Attachment
RCRDTYPE	• "Message" - emails • "Calendar Item" - Outlook calendar items • "Contact Item" - Outlook contact items • "" - blank for loose files/ attachments	Message	(n/a for attachments)
FILENAME	File name of the loose file/ attachment.	(N/A for emails)	Attachment1
DOCEXT	File extension of the loose file/attachment.	(N/A for emails)	doc
MODDATE	Last modified date of the loose file/attachment - in this example, the format is "MM/ dd/yyyy".	(N/A for emails)	02/02/2010
MODTIME	Last modified time of the loose file/attachment - in this example, the format is "hh:mm:ss a".	(N/A for emails)	02:54:30 PM
CUSTODIAN	Custodian for the document.	John Doe	John Doe
TAGS	List of tags assigned to the document. Multiple tags are separated by the multi-value separator, for example: "A; B; C", and nested tags are denoted using the nested value separator, for example: "X\Y\Z". Tags for attachments will appear under the custom field "ATTACHMENT_TAGS". **Note:** This custom field only appears for cases prior to 7.1.2x if the case already processed load file sources with "ATTACHMENT_TAGS."	FirstPass\Responsive; FirstPass\ForQC	FirstPass\Reponsive; FirstPass\ForQC
FOLDERS	List of folders of which the document is a part. Multiple folders are separated by the multi-value separator "A; B; C" and nested folders are denoted using the nested value separator, for example: "X\Y\Z". Folders for attachments will appear under the custom field "ATTACHMENT_FOLDERS".	JohnDoeDocs\FirstPass	JohnDoeDocs\FirstPass

Table 2: "TripleALoadFile" Example: Load File Fields

Field	Value	Example Email	Example Attachment
TEXTFILEPATH	Path to the document's text file that contains extracted text to be used for processing. Every document has a relative path to its text file in this field. **Note:** These paths may also be fully qualified; and thus do not have to be relative.	\TEXT\AAA0001.txt	\TEXT\AAA0003.txt
NATIVEFILEPATH	Path to the document's native file. Every document has a relative path to its native file in this field. **Note:** These paths may also be fully qualified; and thus do not have to be relative.	\NATIVES\MESSAGE1.msg	\NATIVES\ATTACHMENT1.doc
NATIVEFILESIZE	File size of native email, loose file or attachment in bytes.	77312	25688

Document Relationships

The example load file has document families represented as a range that begins with the parent and includes the children sequentially afterward. The following table illustrates the Imported Numbering for this load file where Message 1 has two attachments, Attachment 1 and Attachment 2:

Table 3: "TripleALoadFile" Example: Document Relationships

Document	BEGDOC	ENDDOC	BEGATT	ENDATT	Notes
MESSAGE1	AAA0001	AAA0002	AAA0003	AAA0005	2-page email with two attachments
ATTACHMENT1	AAA0003	AAA0004			2-page attachment
ATTACHMENT2	AAA0005	AAA0005			1-page attachment

Opticon File

Instead of providing links to a document's image files under a column in the load file, the example uses an Opticon file to match documents with their images. The Opticon file is an OPT file that contains seven fields per entry. The table below explains the seven fields for each entry.

Table 4: "TripleALoadFile" Example: Opticon File

Field	Description/Value	Example
1	Imported Number for the document page. This must match with a Imported Number in the load file.	AAA0001
2	Volume identifier - not used by the platform.	
3	Path to the image. The path must be either the relative path from the location of the Opticon file or the fully qualified path.	\IMAGES\AAA0001.tif
4	"Y" if the image is the first page of the document. The entry with a "Y" must have the Imported Number that matches with the document's BEGDOC.	Y
5	[Blank]	
6	[Blank]	
7	Page count (not used by platform).	

Note: The images in this example are all single page TIF files, which means that a single TIF coincides with a single Imported Number.

Below is a sample Opticon load file where there are two images that will be associated with one document with multiple pages.

- DOC000001,,\IMAGES\FILENAME1.TIF,Y,,,2
- DOC000002,,\IMAGES\FILENAME2.TIF,,,,

Recommended Import Settings (Example)

Continuing with the "TripleALoadFile" example, this section describes the recommended import settings to be used based on that load file's data, and given its document structure, formats, and document relationships.

Note: The source information and formatting options have been disregarded since they should match the location and formatting for the load file.

Document Relationships Settings

The numbering and document relationship information in this example load file indicates a numbered range with associated beginning and ending fields. This also specifies that documents will be grouped together in a range starting with the parent, and should include the entire family.

Table 5: "TripleALoadFile" Example: Document Relationships

Field	Selection
Document Numbering	**Range**
BegNum	**BEGDOC** [column]
EndNum	**ENDDOC** [column]
Document Families	**Range starting with the parent and including the entire document family**
BegAttach	**BEGATT** [column]
EndAttach	**ENDATT** [column]

Identifiers Settings

Each document should have some identifying unique value, such as a range of Imported numbers or a DocID. This example load file identifies both the prefix and suffix, as well as email, calendar, and contact identifiers and their corresponding values.

Table 6: "TripleALoadFile" Example: Identifiers Settings

Field	Selection
Prefix	**AAA**
Suffix	[blank, no suffix for this load file]
Email identifier	**RCRDTYPE** [column]
Value that identifies email	**Message** [user-specified value]
Calendar identifier	**RCRDTYPE** [column]
Value that identifies calendar	**Calendar Item** [user-specified value]
Contacts identifier	**RCRDTYPE** [column]
Value that identifies contacts	**Contact Item** [user-specified value]

Processing Settings

Every document in the example load file has images, native, and extracted text all available for use. These settings use the images for Native/Image view, the natives for downloading and exporting, and the text file for processing.

Table 7: "TripleALoadFile" Example: Processing Settings

Field	Selection
Where are the image files?	**Load through Opticon file(s)**
File extension	**.OPT**
Where is the indexable extracted text?	**Load file contains a link to an external text file**
[dropdown]	**TEXTFILEPATH** [column]
Link to natives in load file	**NATIVEFILEPATH** [column]
Metadata source	**Use metadata from load file for standard fields and custom fields; do not extract metadata from native.**
If a document has both extracted text and native files, which should be indexed for search?	**Extracted text**

File Types Settings

The example load file contains file types for emails, attachments/loose files, as well as both emails and attachments/loose files, which are mapped according to type/grouping:

Emails

Table 8: "TripleALoadFile" Example: File Type Settings (Emails)

Field	Selection
To	**TO** [column]
From	**FROM** [column]
CC	**CC** [column]
BCC	**BCC** [column]
Subject	**SUBJECT** [column]
Date and time are separate fields	[selected - based on this sample load file]
Date sent	**DATESENT** [column]
Date format	**MM/dd/yyyy**
Time Sent	**TIMESENT** [column]
Time format	**hh:mm:ss a**

Attachments/Loose Files

Table 9: "TripleALoadFile" Example: File Type Settings (Loose Files/Attachments)

Field	Selection
My load file contains loose files and/or attachments	[selected - based on this sample load file]
File Name	**FILENAME** [column]
File Extension	**DOCEXT** [column]
Date and time are separate fields	[selected - based on this sample load file]
Date sent	**MODDATE**
Date format	**MM/dd/yyyy**
Time Sent	**MODTIME**
Time format	**hh:mm:ss a**

Emails and Attachments/Loose Files

Table 10: "TripleALoadFile" Example: File Type Settings (Custodian)

Field	Selection
Custodian	**CUSTODIAN**
File size	**NATIVEFILESIZE**

Tags Settings

This load file's tag format and column is mapped:

Table 11: "TripleALoadFile" Example: Tag Settings

Field	Selection
What is the format of the tags in the load file?	**Single tag field with multiple values**
[dropdown]	**TAGS** [column]

Folders Settings

Folder settings for this load file specify the folder format and column name:

Table 12: "TripleALoadFile" Example: Folders Settings

Field	Selection
What is the format of the folders in the load file?	**Single folder field with multiple values**
[dropdown]	**FOLDERS** [column]

Minimum Requirements

This section shows an example of only the minimum required fields necessary (based on the same data in the "TripleALoadFile" example described in the previous sections).

Load File Field Requirements

This load file contains metadata only, indicating that there are no images, natives, or text available for any of the documents.

Table 13: "TripleALoadFile" Example: Load File Fields (Minimum Required)

Field	Value	Example Email	Example Attachment
BATESNUM	Imported Number for the document	AAA0001	AAA0002
RCRDTYPE	• "Message" - emails • "Calendar Item" - Outlook calendar items • "Contact Item" - Outlook contact items • "" - blank for loose files/attachments	Message	(n/a for attachments)
FILENAME	File name of the loose file/ attachment.	(n/a for emails)	Attachment1
DOCEXT	File extension of the loose file/ attachment.	(n/a for emails)	doc

Note that, at a minimum, the load file must contain a Imported Number for all records, a field to denote an email (in this case RCRDTYPE), and a filename for attachments/loose files. This example also includes the documents extension (DOCEXT).

Performing Imports

This section takes you through the steps for setting up your import criteria, understanding document relationships, considering processing options, in preparing your load file for import.

Note: Be sure to review the best practices section of this guide which covers the structure and format of your load file, and other time-saving information before you import,

Refer to the following topics in this section:

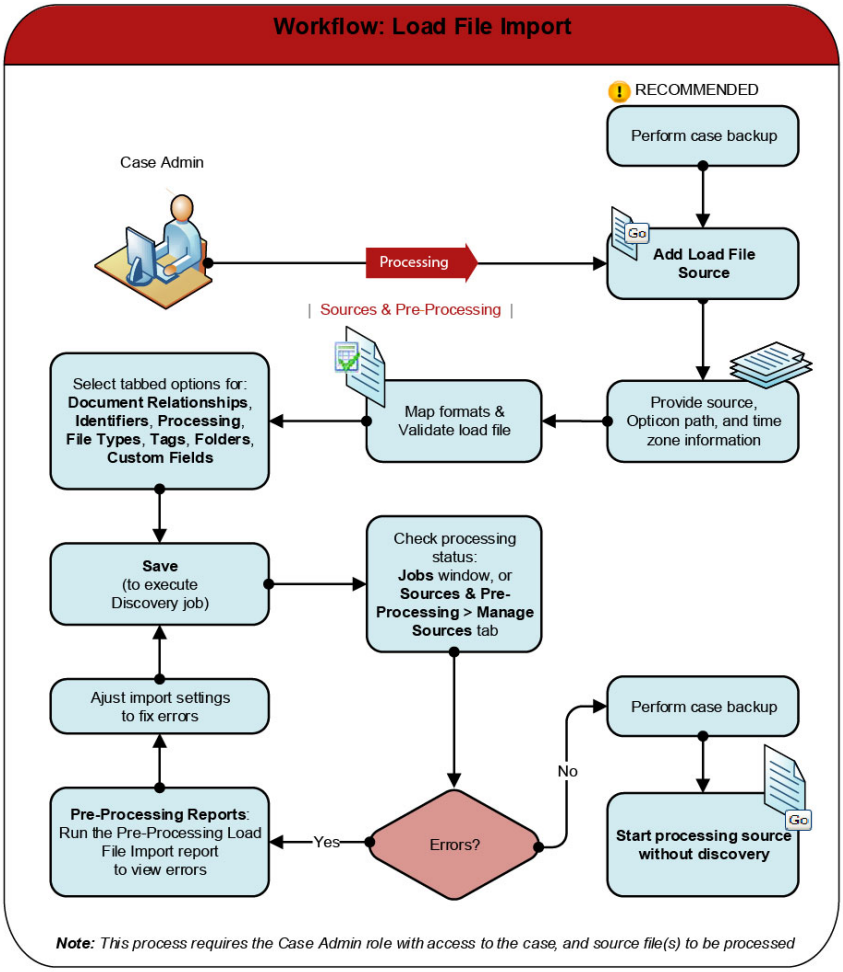
- *"Load File Import Overview" on page 27*
  - *"Load File Import Process Flow" on page 28*
- *"Preparing to Import Load Files" on page 29*
  - *"Load File Prerequisites" on page 29*
  - *"Step 1: Add the Load File Source" on page 31*
  - *"Step 2: Provide Source Information" on page 31*
  - *"Step 3: Map Formats and Validate Load File" on page 33*
  - *"Step 4: Specify Document Relationships" on page 36*
  - *"Step 5: Define Identifiers" on page 39*
  - *"Step 6: Select Processing Options" on page 42*
  - *"Step 7: Map File Types" on page 51*
  - *"Step 8: Apply Tag Formats" on page 54*
  - *"Step 9: Specify Folders" on page 56*
  - *"Step 10: Create Custom Fields" on page 57*
- *"Checking and Saving Settings" on page 61*
  - *"Save Settings as a Template" on page 61*
  - *"Save Settings" on page 61*

Load File Import Overview

To provide your reviewers with the best possible search results from your load file source data, see *"Import Best Practices" on page 13*. Understanding best practices will help guide you through the import process to save time and avoid potential issues before discovery and processing.

Load File Import Process Flow

The load file import (pre-processing) feature allows you to add third party load files as a case source for processing, and make the data available and searchable for review.



The load file import process starts with adding the load file as a source to your case. Be sure to specify the Opticon file path, time zone data, and source information if you have images to import. Once added, you can map formats and validate the file as you go to ensure fields are correctly matched. After selecting appropriate options, you can discover the data, view errors and adjust settings, then process the source for analysis and review.

For more information about preparing and processing case data, refer to the section *"Pre-Processing Navigation" in the Case Administration Guide*.

Preparing to Import Load Files

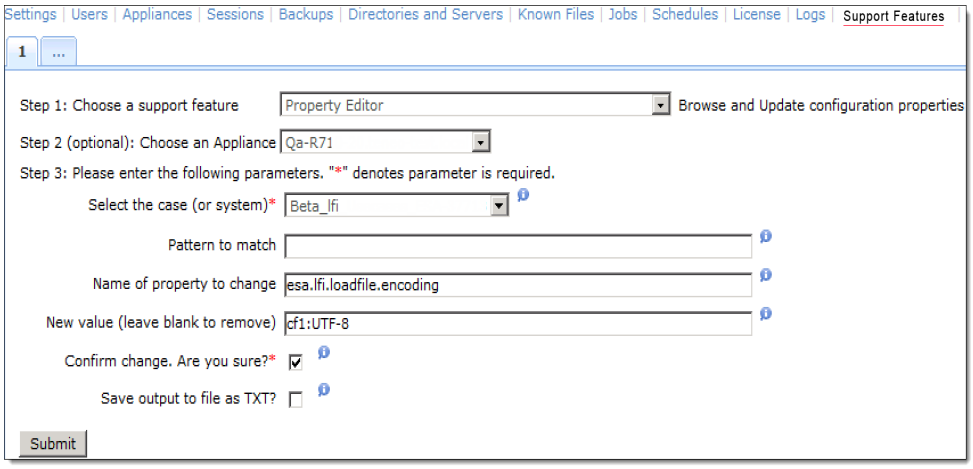
Follow the steps in order to import your load file(s):

- *"Load File Prerequisites" in the next section*
- *"Step 1: Add the Load File Source" on page 31*
- *"Step 2: Provide Source Information" on page 31*
- *"Step 3: Map Formats and Validate Load File" on page 33*
- *"Step 4: Specify Document Relationships" on page 36*
- *"Step 5: Define Identifiers" on page 39*
- *"Step 6: Select Processing Options" on page 42*
- *"Step 7: Map File Types" on page 51*
- *"Step 8: Apply Tag Formats" on page 54*
- *"Step 9: Specify Folders" on page 56*
- *"Step 10: Create Custom Fields" on page 57*

Load File Prerequisites

Load File/Opticon Encoding Formats Entered With Property Browser

If the detected load file encoding format is not correct, the Property Browser can be used to set the encoding format the case level. You must perform this step before adding the load file source to the case.



This example adds a custom encoding format of `UTF-8` for the files in the load file folder called `cf1`.

To add load file or Opticon file encoding formats in Property Browser

1. Go to **System** > **Support Features** and select **Property Editor**.
2. (Optional) Choose an Appliance from the drop-down menu.
3. Select the case from the drop-down menu.
4. Enter the name of the property: `esa.lfi.loadfile.encoding`

   Note: For an Opticon file, enter: `esa.lfi.linkedfile.encoding`
5. For **New value**, enter: `cf1:UTF-8`

   Notes:

   – If the case has multiple folders, separate the multiple entries with a semicolon (;). For example, `cf1:UTF-8;cf2:ASCII`

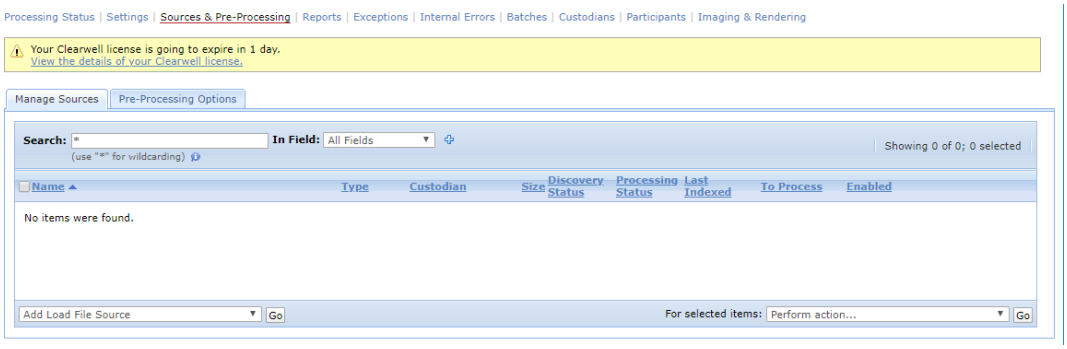
   – It is recommended that reserved characters such as the semicolon and colon not be used as part of case folder names. If having a semicolon or a colon as part of the folder name is unavoidable, be sure to include the escape character (\) when entering the case folder name in the property browser. For example, if `casefolder;1` is the case folder name of your load file, then you would enter the following for the value: `casefolder\;1:UTF-8`
6. Click **Submit** to save your setting.

Step 1: Add the Load File Source

The first step of the import process is to add the file and define the source name, location, type, and formatting of the load file so that it may be parsed correctly.

To add the load file in the platform:

7. Under the **Processing** module, within your case, select **Sources & Pre-Processing**.
8. Click the drop-down menu to select **Add load file source** and click **Go**.

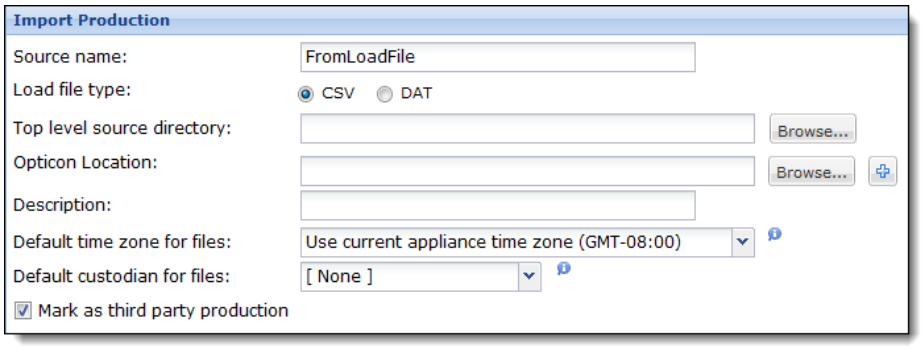


Note: If you have upgraded the platform to 7.0, a warning message appears prompting you to acknowledge potential document processing issues associated with this upgrade and have taken appropriate measures. (This applies to upgraded cases only.)

Step 2: Provide Source Information

When you select Add Load File Source, the Import Production menu displays where you can fill in specific source information.

On the **Import Production** menu, specify the source information for the appropriate fields.



Note: If a template already exists which should be applied to this load file, choose one from the "Select mapping template" drop-down list. To save settings as a template at any time during the set up process, see *"Save Settings as a Template" on page 61*.

To provide source information:

1. Specify the following information, depending on your load file type:

Table 14: Import Production

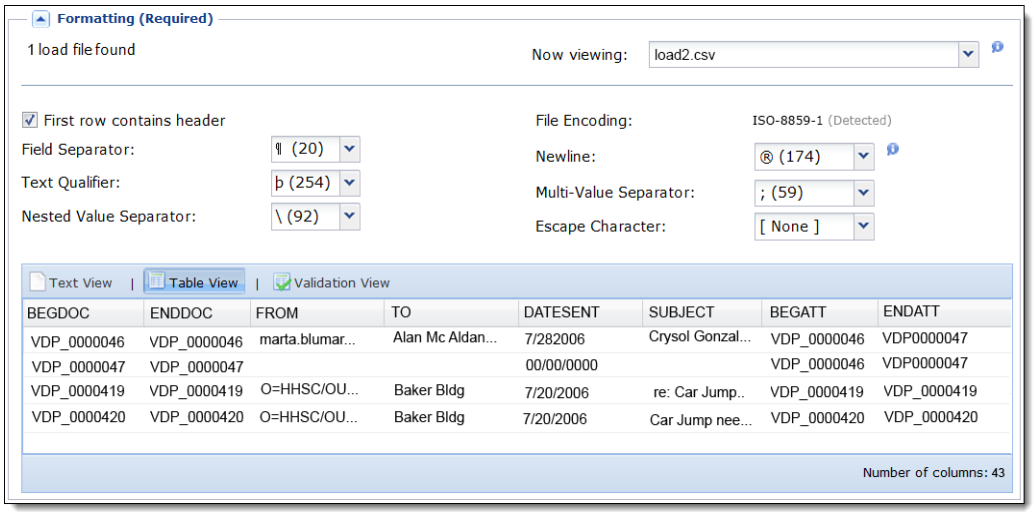
Field	Description
Source name	Provide a name for the new source to be created for the case.
Load file type	The file type of the load file to be imported. Currently, only CSV and DAT formats are accepted.
Top level source directory	Type the directory where the load file is located, or click **Browse** to manually locate the file. (There is no limit to number of files.)
Opticon Location	Type the directory where the Opticon files are located, or click Browse to manually locate the files. Selecting the Plus sign allows you to enter multiple paths for the directories where the Opticon files reside. For more information, see *"Loading Image Files" on page 43*.
Description	Enter a description of the new source to be created for the case.
Default time zone for files	Select a time zone to apply to the source. If the documents are not associated with time zones, the default time zone in the source will be applied.
Default custodian for new files	Select custodian from the drop-down menu or leave as **[None]**. If no custodian is provided for a given document in the load file, the document will be associated with the selected custodian by default.
Mark as third party production	Selected by default. Flags the source as a third party production so that the imported file records can be easily included or excluded during search. (Clear this option if this source data is not a third party production.)

2. After you add the source path and the product detects the CSV or DAT file, the load file is added.

Step 3: Map Formats and Validate Load File

The Formatting section of Import Production includes specifying the file delimiters in the load file. The application supports the default Concordance delimiters, default CSV delimiters, and additional options.

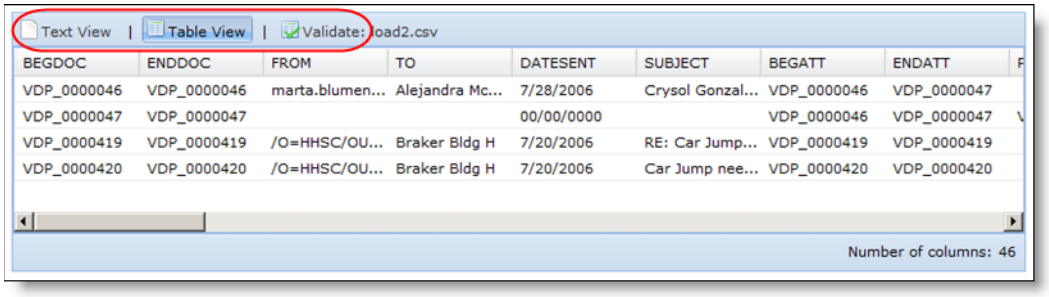
The **Formatting (Required)** section displays the number of load files found and the name of the file currently displayed in the preview pane.



Note: All settings will apply to all load files in the top level source directory, and therefore all must be formatted the same.

About the Preview Pane

The preview pane provides a **Text View** or **Table View** of your load file data, displaying the first four lines of the file. As the various import settings change, the preview pane will update in real-time to show the impact of your settings, and provides validation for mapped formats, along with data population information.



When you change the Formatting settings, the columns and data change in the preview pane. Similarly, when you select fields from drop-down menus, the fields are highlighted in the preview pane. After you have selected all applicable formats, use the **Validate** feature to check your mappings.

To map formats and validate the file:

1. If the first row of the load file contains header information for each column, select the **First row contains header** option.
2. Specify the following information. (See Table 16: *"Supported Character Formats" on page 35* for a list of all supported character formats.) All fields are required.

Table 15: Formatting (Required)

Field	Definition / Selections
Field Separator	Indicates the columns which hold data. Select a supported field separator.
Text Qualifier	Indicates the beginning and end of text within a field. Select a supported text qualifier.
Nested Value Separator	(Optional) Indicates where the data has multiple levels, such as folders which contain subfolders. For example, in a document with the associated folder "ReviewSet\Cust1\Batch02", the "\" character is the Nested Value separator, and "Batch02" is the subfolder of Cust1, a subfolder of "Review Set". **Note:** Nested value separators may only exist between nested values; leading and trailing nested value separators are not supported.
File Encoding	The Field Encoding field automatically detects the load file text encoding. In the example, the file encoding ISO-8859-1 is detected. **Note:** If the file encoding was set with the property browser, the field displays both the encoding (character set) and the text "Set by Property".
Newline	Character used to format the text, when indexing text from a load file. Newline within text field used during display to show carriage return. Select a supported newline character.

Table 15: Formatting (Required)

Field	Definition / Selections
Multi-Value Separator	(Optional) Indicates multiple values within a single field. Select a supported multi-value character.
Escape Character	(Optional) Indicates the start character in a field to be interpreted differently from the same character occurring alone. Select a supported escape character. **Note:** This is necessary only when any of the formatting characters appear in the content field; for example, when the "\" character is used as a field separator.

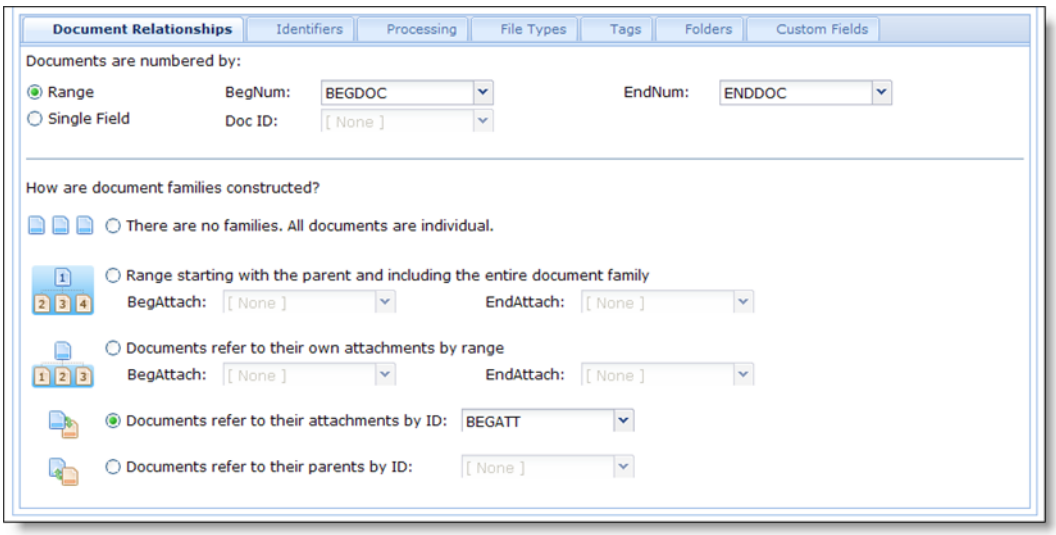
Table 16: Supported Character Formats

Character Type	Supported Formats			
Field Separators, Text Qualifiers, Nested Value Separators, Multi-value Separators	(20)	,(44)	\(92)	®(174)
	(34)	:(58)	^(94)	Þ(254)
	(39)	;(59)	|(124)	
Newline	\n(10)	\r(13)	|(124)	®(174)
File Encoding (includes but limited to the following four common encoding formats)	UTF-8	UTF-16	ASCII	ISO-8859-1
Escape Character	(34)	\(92)	|(124)	
	(39)	^(94)	~(126)	

3. Validate your mappings by clicking **Validate** ( ) icon. Check which fields (by percentage) were populated. Adjust settings as necessary.

Step 4: Specify Document Relationships

After mapping your formats and validating the file, the next step is to specify **Document Relationships** (first tab). This numbering and relationship information assists in properly associating different documents, and determining how they should be grouped together.



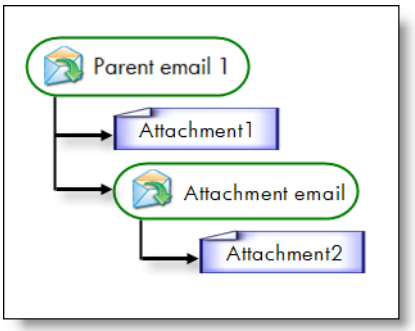
Identifying Documents

To identify a document, you may either identify two columns that list the beginning and ending Imported number in a range (**BegNum** and **EndNum**), or a single field that lists the Imported number for the document (Doc ID). You may not list a range within a single column.

Note: Giving a Imported number range within a column such as "ABC01 - ABC06" is not supported. (You will assign Imported numbers for the **Identifiers** in the next tab.)

Identifying Attachments

Every document that has one or more attachments needs to identify the attachments. There are four different ways to identify attachments within a load file. In the following example, an email has two attachments, one of which is also an email. The attachment email has its own attachment.



To provide numbering and specify document relationships

1. Enter the range or single field information for the documents:

Table 17: Document Relationships: Imported Numbering

Field	Description
Range	Select if the document is defined by an inclusive range of Imported numbers: • **BegNum**—Select the field that denotes the beginning Imported number associated with the document. • **EndNum**—Select the field that denotes the ending Imported number associated with the document.
Single Field	Select if the document is defined by a single Imported number (ranges are not allowed): • Doc ID—Select the field that denotes the ID for the document.

2. Specify how document families are constructed:

Table 18: Document Relationships: Document Families

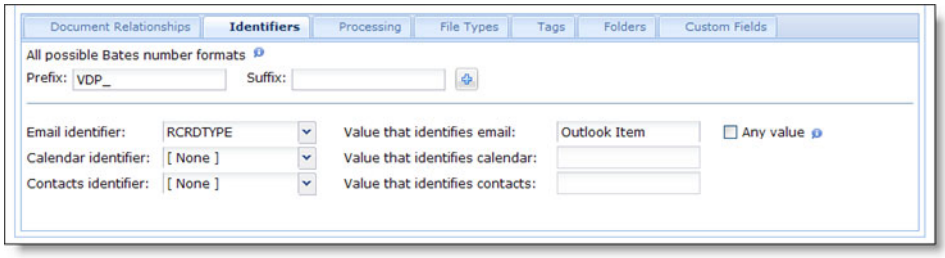
Field	Description
There are no families. All documents are individual.	Select this option if there are no attachments. A document with no attachments can be displayed either of two different ways in the load file: • The document's own Imported number range is used for the attachment range. • The attachment range is left blank. **Note:** This option is used when either no attachments exist in the load file, or you want the platform to treat every document as an individual document.
Range starting with parent...	All attachments are identified using a Imported range and are associated with the parent document. The attachment information for every document in the family is identical, and includes all documents in the family. Select if a parent is in a sequential range with its attachments: • **BegAttach**—beginning Imported number for a document's attachments • **EndAttach**—ending Imported number for a document's attachments **Note:** This option does not allow for grandchildren.

Table 18: Document Relationships: Document Families

Field	Description
Documents... attachments by range	All attachments are identified using a Imported range. Each parent lists the range of documents that are attached to it. The attachment information for each document will vary within the family. If a document does not have an attachment, the fields listing the attachment information will be blank. Select this option if a parent is **not** in sequential range with its attachments: • **BegAttach**—beginning Imported number for a document's attachments • **EndAttach**—ending Imported number for a document's attachments.
Documents... attachments by ID	Each document lists its own attachments by Doc ID, separated by the multi-value separator character. If a document does not have an attachment, this field will be blank. Select this option if the document is defined by a single Imported number (ranges are not allowed).
Documents... parents by ID	Each document lists its own parent document. If a document is not an attachment, the Parent ID field will be blank. Select this option if an attachment refers to its parent by a single Imported number.

Step 5: Define Identifiers

The next step is to select your load file's **Identifiers** (second tab). By defining certain rules regarding the imported documents, the platform can intelligently process the documents for analysis and review.



Documents are identified either by a column listing their DocID or by two columns that list the first and last Imported number in the range of numbers assigned to that document. (These are the column or columns you specified in the Document Relationships tab.)

Determining Document Identifiers

Within a document set, the platform can distinguish between email messages, calendar items, contacts, and loose files (documents that are not email or other file types). If your load file contains documents containing email messages, calendar items, tasks, or contacts, you can specify a column that identifies the type of document being loaded, along with a corresponding value. For example, you can identify the column to be DOCTYPE, with the value "email". For identifying email types, you may also list a column such as "From:" that, if it contains any value at all, identifies that document as an email.

Note: If an email has been defined to be identified as having any value in a particular field, and one of the other document types has been defined as having a specific value in a specific column, if a document matches both of these criteria then the other document type will be used.

About Imported Numbers and Doc IDs

Each document should have some identifying unique value, such as a range of Imported numbers or a DocID.

Imported numbers and DocIDs can have prefixes, suffixes, both, or neither. A prefix is any text that documents will share at the beginning of the Imported number. A suffix is any text that documents will share at the end of the Imported number. Each document should have a unique, numerical value as part of the Imported number. Any numbers not specifically listed as a prefix or suffix will be presumed to be this unique number. You may have more than one set of prefixes and suffixes within a load file. The Imported number formats within a load file may be given on the Identifiers tab.

Valid Imported Numbers

Below are examples of valid Imported numbers. Note that the one value that needs to be present is the number, which may contain special characters such as ".". More than one prefix or suffix is allowed within a load file, though each prefix and suffix must be listed when defining the structure of the load file.

Table 19: Examples: Valid Imported Numbers

Imported Number	Prefix	Number	Suffix
ABC-001	ABC-	001	
001DEF		001	DEF
ABC-001-DEF	ABC-	001	-DEF
001		001	
0.7.8.15		0.7.8.15	
	Note: In the case of blank Prefix and Suffix values, a format must be defined for this to be accepted.		
PRD1:849.001	PRD1:	849.001	
ABC001-01	ABC	001	-01

The following are examples of invalid Imported numbers:

Table 20: Examples: Invalid Imported Numbers

Invalid Imported Number	Prefix	Number	Suffix
ABCDEF	ABCDEF		
ABC-one	ABC-		-one

To provide document identifiers

- Enter the Imported number information to define for the documents:

Table 21: Identifiers

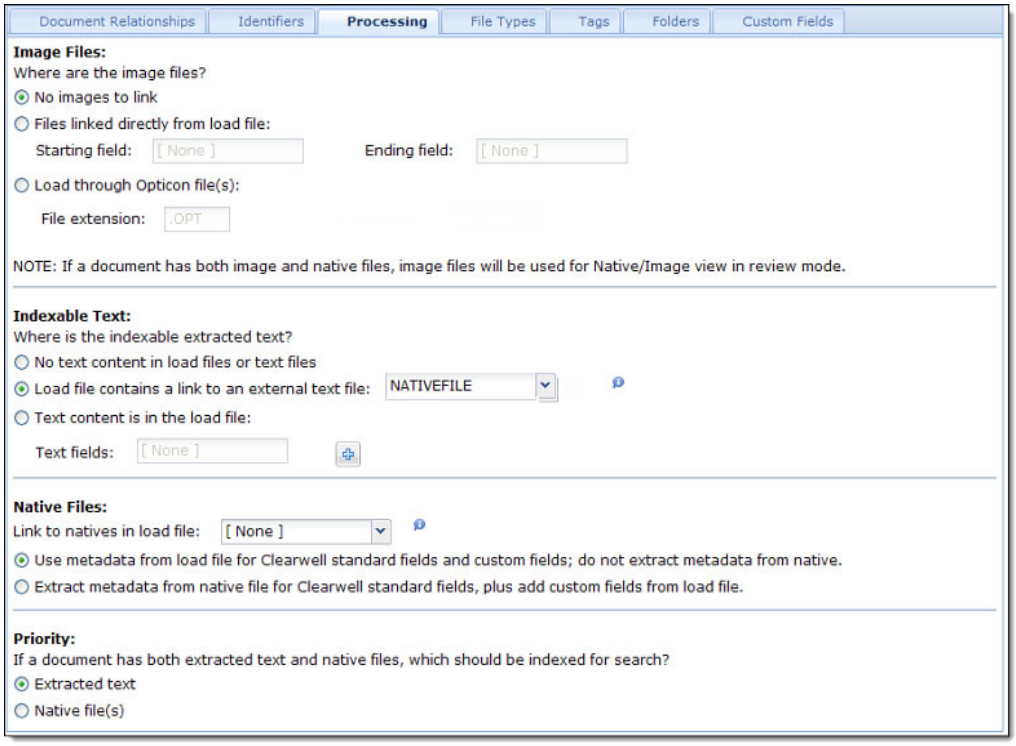
Field / Area	Description
All possible Imported number formats	Define the Prefix and Suffix in the allowable format: [PREFIX][number][SUFFIX] **Example:** VDP_0001X where "VDP_" is the prefix, 0001 is the number, and X is the suffix. The prefix and suffix are effectively ignored for sorting purposes. • **Prefix**—If applicable, enter the string that defines the prefix of the Imported number. • **Suffix**—If applicable, enter the string that defines the suffix of the Imported number. Click the icon to add more formats.
Document Identifiers	Define the identifiers that will allow the system to correctly process documents and their corresponding value. • **Email identifier**—Select the field used to identify documents as email messages and enter a corresponding value. (Alternatively, select **Any value** to use any value in the specified column to identify an email.) **Note:** If native files are supplied for any record that is marked as an email, then that native file must be an ".eml" or ".msg" file. • **Calendar identifier**—Select the field used to identify documents as calendar items and enter a corresponding value. • **Contacts identifier**—Select the field used to identify documents as contacts and enter a corresponding value. **Note:** Any documents that do not fall under these characterizations will be treated as attachments or loose files.

Step 6: Select Processing Options

Load files may contain any combination of image files, indexable extracted text, and native files for any given document. Selecting options in the **Processing** tab determines how the platform will accept these files into processing.

The Processing options are grouped into four different sections, for handling **Image Files**, **Indexable Text**, **Native Files**, and **Priority** (in case of conflict over which source should be used for indexing or metadata). To begin selecting processing options, see *"To specify image files, Indexable Text, Native Files, and Priority processing" on page 47*.

Note: The path of image, text, and/or native files should be always relative to the case folder source to which the load file belongs. (There is no restore for metadata, only content.)



About Image Files

When image files are loaded into the system through load file import, the image will be displayed during native review (native/image view in Review mode) and used for creating production images. Image files are not considered a native file. When "Native" options are selected, only native files can be exported. If there is no native version of the file present, the image will *not* be exported as native. (This applies only if your export options include native files for export). See also *"Depending on load file settings, Analysis & Review displays file sizes that match mapped values from either the load file or native file." on page 49*.

OCR

Image files will not be processed for OCR during import, or available for OCR once the file has been imported. If you need the image file to be OCR processed you must import the image file as a native file.

Loading Image Files

The platform supports both the Opticon file format and loading image files using links to the files that are listed in one or more columns in the load file. You can specify the file extension, directory or directories that contain the Opticon files. Your Opticon file should reference the Imported numbers as given in the load file.

Specifically, in the Opticon file, the following columns are required for importing images into the platform. All other columns will be ignored.

Column 1: Imported number
Column 3: Path to the image file
Column 4: Document's first page value (Y/N)

Note: For multi-page TIFFs, the column indicating the document's first page value should always be Y. Also, the file path should be relative to the original load file.

The following table is an example of a multi-page TIFF image file:

Table 22: Opticon File - Multi-Page TIFF Image File Example

REM-0008		\export_0000001\image\0000001\REM-0008.tif	Y
REM-0009		\export_0000001\image\0000001\REM-0009.tif	Y
REM-0013		\export_0000001\image\0000001\REM-0013.tif	Y
REM-0014		\export_0000001\image\0000001\REM-0014.tif	Y

The following table is an example of a file containing links to multiple single-page TIFF files for the same document:

Table 23: Links to Multiple Single-Page TIFF files Example

REM-0008		\export_0000001\image\0000001\REM-0008.tif	Y
REM-0009		\export_0000001\image\0000001\REM-0009.tif	Y
		\export_0000001\image\0000001\REM-0010.tif	
		\export_0000001\image\0000001\REM-0011.tif	
		\export_0000001\image\0000001\REM-0012.tif	
REM-0013		\export_0000001\image\0000001\REM-0013.tif	Y
REM-0014		\export_0000001\image\0000001\REM-0014.tif	Y
		\export_0000001\image\0000001\REM-0015.tif	

The following table is an example of a file containing links to multiple single-page PDF files for the same document:

Table 24: Links to Multiple Single-Page PDF Example

REM-0015		\export_0000001\image\0000001\REM-0015.pdf	Y
		\export_0000001\image\0000001\REM-0016.pdf	

As with Opticon files, you may also load one multi-page TIFF, PDF, or JPG file per document or several single-page TIFF, PDF, or JPG files by identifying the column or columns in which the paths to the image files are located. If your load file has two or more columns with links, the system assumes that the columns will be adjacent to each other in the file, and the data will be in order such that the first image will be in the first column, the second image in the second column, and so on. Be sure to specify the first and last columns that contain links to image files. The columns in between are assumed to also contain links to image files.

About Extracted Text

If you plan to import text that has been extracted from the original native file, or obtained using OCR from an image file, the text can be indexed and treated as the text of the document.

Note: If the document has a native file as well as a text file, you will be able to choose which one will be indexed and treated as the text of the document.

Loading Extracted Text

If your load file contains a link to an external text file, the platform provides the option to load the text using links specified in a column in the load file. You will need to identify the column in which the path to the text files is located.

Similarly, if the text content is in the load file, you can allow the system to load the text contained in the load file by identifying the one or more columns in which the text is located.

Note: The platform does not support multiple columns with links to text files.

Native Files

Some load files may contain native files as well as images and text. If there are native files in your load file, be sure to identify the column which contains the path to the native file. With the location identified, select an appropriate option.

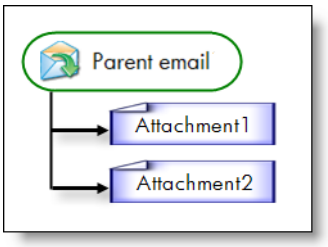
Note: Using Native Files options will charge your processing license for native files, as well as any indexable content processed.

In some cases there may be images and text for redacted documents, but native documents for others. A common mixed-mode scenario is to provide images and text for one set of file types that are easy to create images for, such as Microsoft Word, but to provide Excel files (.xls) and PowerPoint files (.ppt) in native format due to complications with creating images for them.

Native Files with Attachments

Processing native files with attachments

If you choose to process native files, the attachments will be processed in a manner depending on how the documents are listed in the load file. You may use both methods shown below within the same load file. In the following example, a parent email has two attachments:



Documents Listed without Separate Attachments

If you list the Parent Email in the load file on its own line, without listing its attachments separately on their own lines in the load file, and have chosen to process the document natively, then the system will not process those attachments.

Example:

BegNum	EndNum	BetAtt	EndAtt	NativePath
EML001	EML001	EML001	EML001	\native\EML001.msg

Documents Have Attachments Listed Separately

If you list the Parent Email in the load file, and list Attachment 1 and Attachment 2 (from the previous example) on separate lines in the load file, with their own Imported numbers and listed as attachments of the Parent Email, and have chosen to process them natively, then the following will occur:

- The Parent Email will be processed natively, but the attachments will be ignored. This means that the number of attachments will not be checked against the number of attachments listed in the load file.
- Each attachment listed will be processed natively, using the native file found using the path listed in the load file for finding native files.
- The Parent Email and the attachments will have the Imported number(s)/DocID and custom field values assigned to them that are listed in their individual rows in the load file.

About Priority

In the following example, choosing "Native file(s)" as the priority, (with the document REM0001 containing only a text file) the text file will be indexed. Document REM0002 contains only a native file, so the native file will be processed as well as indexed. Similarly, the native file in document REM0003 will also be processed and indexed because the load file contains both text and a native file available, so the native file is given priority.

Example:

DocID	TextPath	NativePath
REM0001	\text\REM0001.txt	
REM0002		\native\REM0002.xls
REM0003	\text\REM0003.txt	\native\REM0003.xls

To specify image files, Indexable Text, Native Files, and Priority processing

- Specify if (and how) the platform will handle image files:

Table 23: Processing Options

Field / Area	Description
Image Files	**Where are the image files?** Select one of the following options: • **No images to link**—There are no images for the documents in the load file. • **Files linked directly from load file**—There are direct links to the images in the load file itself. Use the **Starting Field** and **Ending Field** selectors to denote the consecutive range of fields in the load file that contain links to the image files. • **Load through Opticon file(s)**—Select the **File extension** and **File encoding** of the Opticon file. **Note:** If a document has both image and native files, image files will be used for Native/Image view in Review Mode.
Indexable [Extracted] **Text**	**Where are the indexable extracted text?** Select one of the following options: • **No text content in load files or text files**—There is no text supplied for the documents in the load file. • **Load file contains a link to an external text file**—There is a direct link to the text files for the documents in the load file. Select the field in the load file that denotes the link. • **Text content is in the load file**—The text content is inline in the load file. Select one or more Text fields to define content. Click the icon to add more text fields. **Note:** Your Processing license will be charged for any indexable content processed from text files.

Table 23: Processing Options

Field / Area	Description
Native Files	If native files are associated with the documents, select the field from the drop-down menu that contains the link to the native files. Select one of the following options: • **Use metadata from load file...** Select this option if you want to use metadata from the load file for the platform standard fields as well as custom fields. – The native file will not be processed to extract metadata. The platform standard fields will have their values taken from the columns mapped to the platform standard fields. Also, the document has values for the custom fields listed in the load file that are mapped to user-defined fields in platform, those values will be used and assigned. • **Extract metadata from native file**... Select this option if you want to extract metadata from the native file for the platform standard fields (custom fields will still come from the load file) – The platform will process the native file to extract metadata to assign to the standard fields. The platform extended fields will not be extracted. If the document has values for the custom fields listed in the load file that are mapped to user-defined fields in the platform, those values will be used and assigned. **Note:** Using this option will charge your processing license for the native files processed.
Priority	If a document has both extracted text and native files, select which type should be given indexing priority: • **Extracted text** • **Native file(s)** For example, if you prioritize Native file(s) to be indexed first, and you want the text stored in the platform, you can map that column into a custom field. (See *"Step 10: Create Custom Fields" on page 57*.) You may choose to have that field indexed for search by mapping that column to a custom user-defined field. However, that text will only be returned as part of the custom field and not as the main text for the document. **Note:** This option will only affect documents that have both text and a native file listed in the load file. If a native file is processed and its extracted text is indexed for search, the processing will count against your processing license.

Processing Effects on Analysis & Review

The combination of the specified Processing settings along with what is supplied for individual documents will determine what is seen in the Analysis & Review phase.

Table 24: Processing Effects on Analysis & Review

View / Action	Effects
Text View	– If text was supplied and processed for the document, that text will be displayed. – If a native file was supplied and processed for the document, extracted text from the native will be displayed. Otherwise, no content will be displayed.
Native View	– If an image was supplied for the document, the image will be displayed. – If a native file was supplied for the document, an image render of the native will be displayed. – If text was supplied for the document, an image render of the text will be displayed. Otherwise, no content will be displayed.
File Download	If a native file is available, the download link will be enabled for the document. Otherwise, the download link will be disabled for the document.
Re-OCR	If a native file was supplied for the document, the file is an image, and no text is associated with the document, the system will attempt to extract the text using OCR. Otherwise, the re-OCR job will ignore these files.

Considerations:

- Items imported through load files or EDRM XML cannot be skipped during Native Review caching and Production by setting imaging criteria.
- Depending on load file settings, Analysis & Review displays file sizes that match mapped values from either the load file or native file.

Processing Effects on Export

The combination of the specified settings along with what is supplied for individual documents will determine what occurs for different exports.

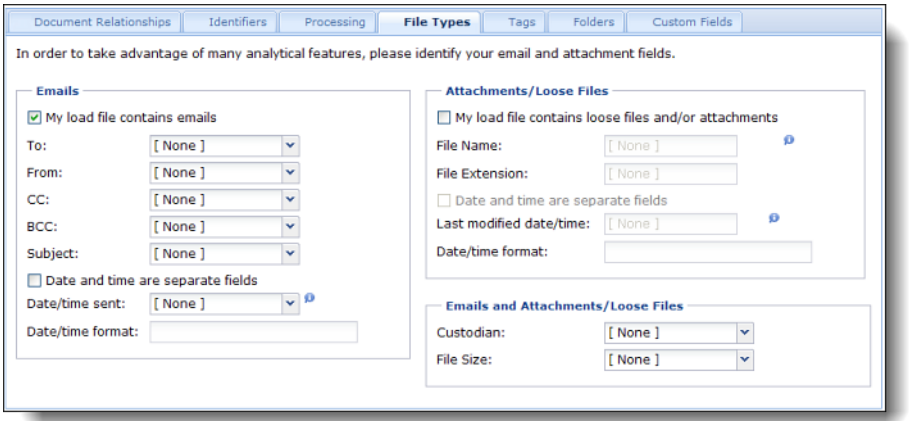
Table 25: Processing Effects on Export

Export Type	Specifications	Effects
Native		All load-file-imported documents will be ignored for native export.
Metadata		The exported metadata will match what was imported (from load file or native file) – If native files are selected to be exported, a document's native file will be supplied if available. – If text is selected to be exported, the exported text will match what is visible in the text view.
Production	(Image, No redaction)	The exported metadata will match what was imported (from load file or native file) – If images are selected to be exported, the exported image will match what is visible in the image view – If native files are selected to be exported, a document's native file will be supplied if available. – If text is selected to be exported, the exported text will match what is visible in the text view.
	(Image, Redaction)	The exported metadata will match what was imported (from load file or native file) – If images are selected to be exported, the exported image will be based on what is visible in the image view – If native files are selected to be exported, a document's native file will be supplied if available. **Note:** In redacted documents, the native file is not supplied, and is marked "Redacted" in the Custom Document Information section of the resulting EDRM file. – If text is selected to be exported, the exported text will be based on the redacted image. **Note:** Text that is exported for a redacted document is the same text displayed. This is done to prevent privileged data from being exported.
	(Native)	The exported metadata will match what was imported (from load file or native file) If native files are selected to be exported, a document's native file will be supplied if available. **Note:** If not available, a slip sheet placeholder file will be created with the filename of **[Imported NUMBER]_slipsheet.txt**
PDF Print		The metadata will match what was imported from load file or native file. The content will match what is visible in the native view.

For more information about exports, refer to the *Export and Production Guide*.

Step 7: Map File Types

The **File Types** tab is where you select settings that allow the system to map specified metadata into the platform standard fields for use in analysis.



There are two main sections for each group of file types: **Emails** and **Attachments/Loose Files**. For both, the **Emails and Attachments/Loose Files** section allows you to map the custodian and file size associated with both email messages and attachments or loose files.

About Emails and Attachments/Loose File Types

If your load file contains email messages or loose files/attachments and you do not intend to get document metadata by having the system process native versions of the documents, you can identify the columns that hold key metadata values needed for email messages and loose files/attachments. You can also specify settings depending on whether date and time fields are separate.

To map email file types

1. If the load file contains email messages, in the **Emails** section, select the **My load file contains emails** option.
2. Map the following applicable fields for **Emails**:

Table 26: File Types: Emails

Field / Area	Description
To	Select the field that denotes the recipient of the email.
From	Select the field that denotes the sender of the email.
CC	Select the field that denotes carbon copy recipients of the email
BCC	Select the field that denotes blind carbon copy recipients of the email
Subject	Select the field that denotes the subject of the email

3. If dates and times are separate, select the **Date and time are separate fields** option, and continue to step 4. If they are not separate, select the appropriate field for the **Date/Time Sent**, then select an applicable **Date/Time Format**.

4. Map the following additional applicable date and time fields:

Table 27: File Types: Email (Date and Time Fields)

Field / Area	Description
Date Sent	Select the sent format represented in the file.
Date Format	Select the associated date format represented in the file.
Time Format	Select the associated time format represented in the file.

To map Attachments and Loose File types

1. If the load file includes loose files and/or attachments, in the **Attachments / Loose Files** section, select the **My load file contains loose files and/or attachments** option.

2. Map the following applicable loose file or attachment fields:

Table 28: File Types: Attachments/Loose Files

Field / Area	Description
File Name	Select the field that denotes the file name for the attachment/loose file. **Note:** The File Name field must be mapped to identify loose files or non-email attachments.
File Extension	Select the field that denotes the file extension for the attachment/loose file. **Note:** If the File Name field includes the extension, this field can be left blank.

3. If dates and times are separated, select the **Date and time are separate fields** option, and specify the desired formats in step 4. If they are not separate, select the appropriate field for the **Last Modified Date/Time,** then select an applicable **Date/Time Format**.

4. Map the following applicable loose file or attachment fields:

Table 29: File Types: Attachments/Loose Files (Date and Time Fields)

Field / Area	Description
Last Modified Date	Select the field that denotes the last modified date for the attachment/loose file.
Date Format	Select the associated date format represented in the file.
Last Modified Time	Select the field that denotes the last modified time for the attachment/ loose file.
Time Format	Select the associated time format represented in the file.

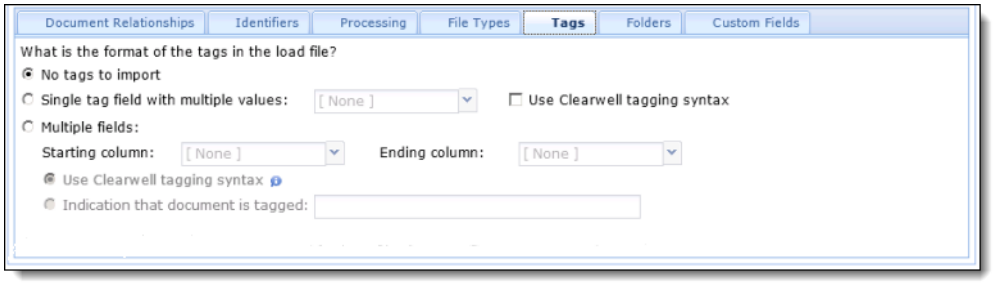
5. Map the following applicable Emails and Attachments/Loose Files fields:

Table 30: File Types: Emails and Attachments/Loose Files

Field / Area	Description
Custodian	Select the custodian associated with the emails, attachments or loose files. If no entry is present, a default custodian is assigned.
File Size	Select the field for the file size which must be a numerical value in bytes.

Step 8: Apply Tag Formats

The platform provides the ability to load tags and folders associated with the documents being loaded. Use the **Tags** tab if your load file contains tag information for its documents, allowing the system to import these tags and tag assignments.



Once the documents are loaded, the tags will be applied to the documents, and the documents will be placed into the folders. (The tags and folders will be created if they do not already exist in system.) You can specify to use either the platform's format or customize your own.

If you are importing an export from a Veritas eDiscovery Platform system that includes tags, you can choose the "Multiple Fields" option and select "Use tagging syntax".

Note: Mutually exclusive tags will always be imported as radio buttons (even if they are drop-down menus). Tag-specific reviewer comments are imported as tags, however the actual reviewer comment is not if a label exists for the reviewer comment.

To apply tag formats

1. Specify the following tag format information:

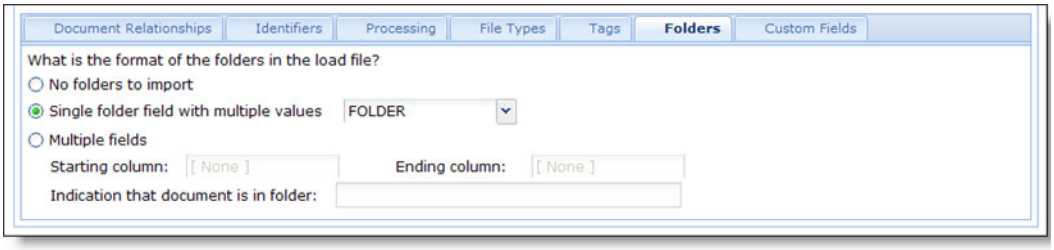
Table 31: Tags

Field / Area	Description
Tag Formats	**What is the format of the tags in the load file?** Select one of the following options: • **No tags to import**—There is no tag data in the load file. • **Single tag field with multiple values**—A document's tags are represented by a single field in the load file using the previously selected multi-value separator. Click the drop-down menu to select the field. – **Use the eDiscovery platform's tagging syntax**—The load file uses the standard tagging syntax to denote that a document is tagged. • **Multiple fields**—A document's tags are represented by multiple fields in the load file. Click **Starting column** and **Ending column** to denote the consecutive range of columns in the load file that represent tags. Choose standard or custom tagging: – **Use the Veritas tagging syntax**—The load file uses the standard tagging syntax to denote that a document is tagged. If this option is selected, a valid summary.xml file is required in the top level source directory in order to successfully import tags using Veritas tagging syntax. The platform checks for the existence of the file and issues an error if one is not found. If a summary.xml is not copied or available from pre-8.0 versions, you can create a dummy summary.xml file which contains only the attributes: "<summary></summary>". **Note:** The summary.xml file contains the export version which determines the format of the tags to be used. – **Indication that document is tagged**—Supply a custom value that denotes that a document is tagged **Note:** For upgraded cases, created prior to 7.1.2 containing previously discovered load file sources, attachment entries from the load file that include tag information will continue to have their tags imported into the custom field "Attachment_Tags" (custom fields can later be searched using the "Custom Attributes" option in Advanced Search). Otherwise, upgraded and new cases attachment level tags are processed as normal tags.

(Refer to the section *"Organize and Track with Bulk Tagging" in the Veritas eDiscovery PlatformVeritas eDiscovery Platform User's GuideUser Guide* for reviewer information on searching tags.)

Step 9: Specify Folders

If your load file contains folder information for its documents, use the **Folders** tab to specify how the system will import these folders and populate them accordingly.



To specify folders

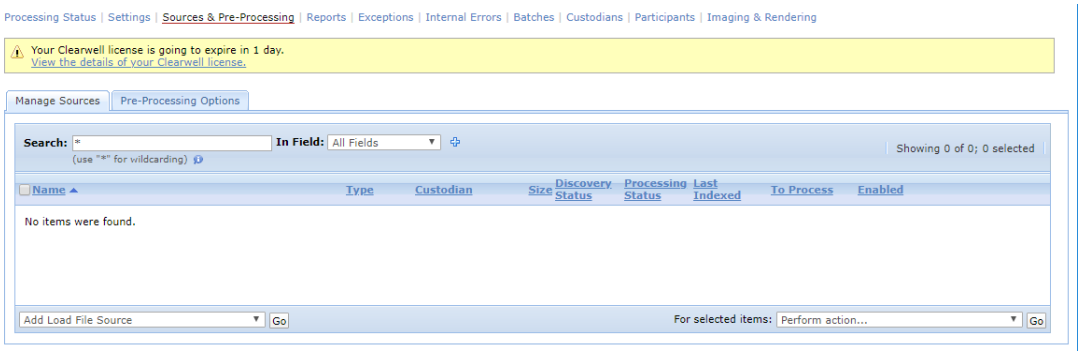
- Specify the following folder format information:

Table 32: Folders

Field / Area	Description
Folder Formats	**What is the format of the folders in the load file?** Select one of the following options: • **No folders to import**—There is no folder data in the load file. • **Single folder field with multiple values**—A document's folders are represented by a single field in the load file using the previously selected multi-value separator. Click the drop-down menu to select the field. • **Multiple fields**—A document's folders are represented by multiple fields in the load file. Click **Starting column** and **Ending column** to denote the consecutive range of columns in the load file that represent folders. • Choose the indicator: – **Indication that document is in folder**—Supply a custom value that denotes that a document is in the specified folder.

Step 10: Create Custom Fields

The last step in preparing your load file for processing is creating fields using the **Custom Fields** tab. For all fields in your load file that do not map to standard platform fields, you can create custom fields to import the additional metadata.



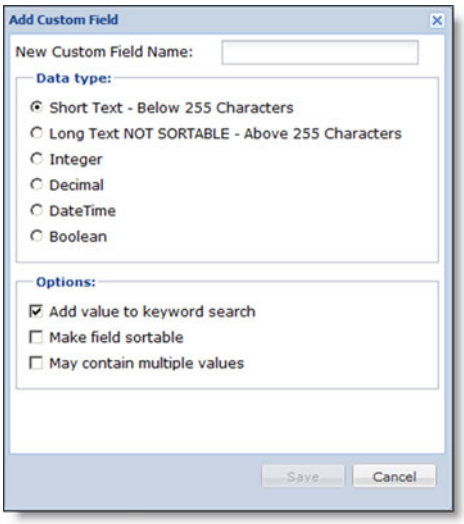
You can create short text, long text, integer, decimal, date/time, and Boolean custom formats. These fields can be searched and sorted on, and may also contain multiple values within the same field. As a result, you can map columns in the load file to these custom fields.

Note: The default number of long text custom fields is 12. You can use the Property Browser to configure and increase the number of long text custom fields allowed in the platform. See *"To change the number of long text custom attributes" on page 59*.

To create custom fields

1. Click **Create Custom Field** at the bottom of the Custom Fields screen.

   The Add Custom Field window opens.



2. Specify the following custom field information:

Table 33: Creating Custom Fields

Field / Area	Description
New Custom Field Name	Enter the name for the custom field.
Data Type	Select one of the following data types: • **Short text** **Note:** Short text fields are limited to less than 255 characters. • **Long text** **Note:** Custom fields with this type will not be sortable above 255 characters. A default of 12 long text custom fields is allowed per case, and each field may only hold up to 10K of data. If you need to increase the default number, use the property browser to set the value. See *"To create custom fields" on page 58*. • **Integer** • **Decimal** • **DateTime** **Note:** The date/time format will be specified when creating the field mapping. • **Boolean** **Note:** The value in the mapped field that indicates a true value will be specified when creating the field mapping.
Options	Choose from additional options: • **Add value to keyword search—**allow value to be applied in keyword searches in Analysis & Review. **Note:** Applicable to short and long text fields. • **Make field sortable—**allows users to search on this custom field in an Advanced Search in Analysis & Review. • **May contain multiple values—**enable this custom field to have more than one value. **Note:** For more information about the Custom Fields filter option in Advanced Search, refer to the section *"Standard Advanced Searches" in the Veritas eDiscovery Platform User's Guide*.

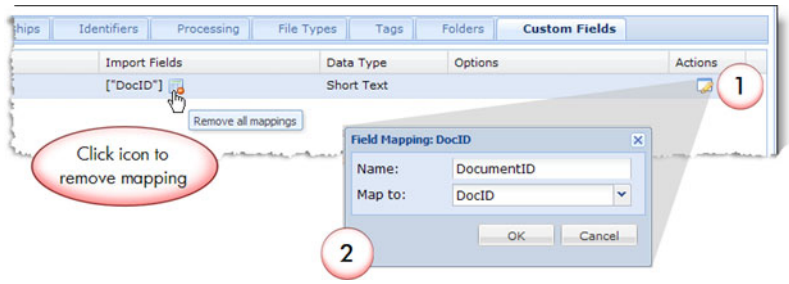
To change the number of long text custom attributes

The example below increases the number of long text fields from the 12 (default) to 14.

1. Go to **System > Support Features**, and select **Property Browser.**
2. Enter the property: **esa.longtext.custom.attributes**
3. Set the value to the new number: **14**
4. Click **Submit** to save the long text attribute setting.

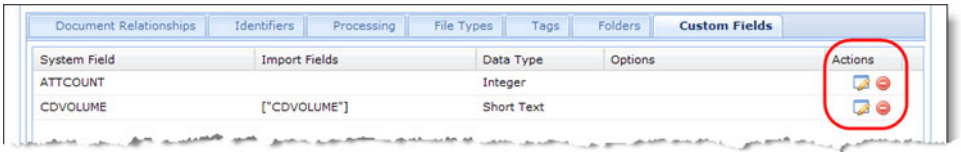
Step 10a: Assign the Field Mapping

After creating a custom field, click the "Edit" icon under the **Actions** column to assign the field mapping and click **OK**. To remove the mapping, click the "Delete Mapping" icon.



Step 10b: Manage Custom Fields

For multiple fields you create, you can view and sort them by **System Fields**, **Import Fields**, **Data Type**, or (other) **Type**, and any **Options** you selected. Click the symbols in the **Actions** column to edit mappings, or delete any custom fields at any time (before processing).



(Refer to the section *"Organize and Track with Bulk Tagging" in the Veritas eDiscovery PlatformVeritas eDiscovery Platform User's GuideUser Guide* for reviewer information on searching custom attributes.)

Checking and Saving Settings

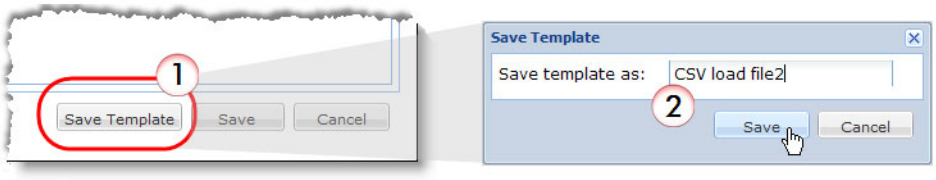
After entering all applicable information, be sure to double-check your settings. You may also want to back up your case (if you have not done so already) before continuing the import process. You can run discovery and configure and adjust load file settings multiple times, however, processing can only be initiated once.

Do one or both of the following:

- Save Settings as a Template
- Save Settings

Save Settings as a Template

At the bottom of the page, before you click "Save", you have the option to save your settings as a template. If you want to make these settings available for future load file sources, click **Save Template**.



In the Save Template window, enter a name for the new template then click **Save**.

Note: The template name is limited to 255 characters. An error message displays if the template name exceeds the 255 character limit.

By default, when you save a template, it is only accessible from the current case (in which it was created). (System administrators can assign templates to other cases from the System view.)

The template then becomes available for selecting and applying to the case (as described in *"Step 2: Provide Source Information" on page 31*) when adding a new load file source.

Save Settings

Once you click "Save", the system runs the discovery job. When ready, click **Save**. Continue with steps in *"Pre-Processing Load Files" on page 63* to check the progress of your job and view results.

Pre-Processing Load Files

Once all import production information is specified, and you have checked your selections carefully, your load file is ready for pre-processing. Pre-processing involves discovering your source so that the system can identify any potential errors, allowing you to view and identify results and if errors occur, resolve them before the case is processed with the new source data. (For more details about preparing and processing cases, refer to the section *"Pre-Processing Navigation" in the Case Administration Guide*.)

This section guides you through the next steps in the load file import process:

- *"Preparing and Running Load Files" in the next section*
  - *"Use Load File Templates" on page 63*
- *"Monitoring Jobs and Viewing Results" on page 64*
  - *"View Job Status and Results" on page 64*
  - *"Discover New Data" on page 65*
- *"Processing Your Case (without Discovery)" on page 66*

Preparing and Running Load Files

Refer to the topics in this section:

- *"Use Load File Templates" in the next section*
- *"View Job Status and Results" on page 64*
- *"Discover New Data" on page 65*

Use Load File Templates

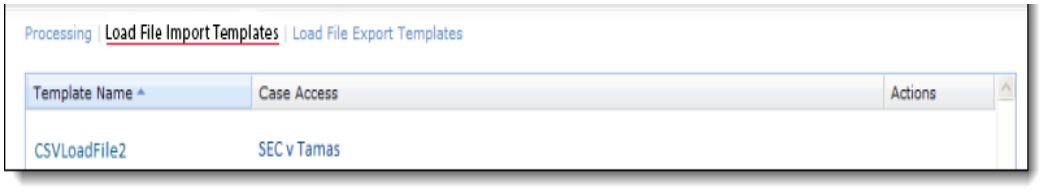
If you have additional load file sources to add based on the settings you saved, using Load File Import Templates save time from having to select the same options more than once. (See *"Save Settings as a Template" on page 61*.)

Note: You must have appropriate administrator privileges to access and apply saved Load File Import Templates.

Once a template has been saved, Case Administrators can access and apply the template to a newly-added load file source for the case as described in Step 2: Provide Source Information.

System administrators can view a list of available load files from the **All Cases** view, and assign templates to additional cases, including future cases created on the appliance.

Click **All Processing > Load File Import Templates**. Templates (if any) are listed by name, and to which case(s) each has access.



Monitoring Jobs and Viewing Results

Clicking "Save" after configuring your load file settings initiates discovery of the load file data. The platform discovers the data contained in the load file(s) and reports status. While the job is running you can monitor its progress, or view results after the job has finished.

View Job Status and Results

Once you have begun discovery, you can monitor progress from the **Jobs** window or from the **Sources & Pre-processing > Manage Sources** tab. In the Jobs window, the "Running" status is displayed while the job is in process:

To view the results from the Jobs window

Click **Jobs** at the top of the screen to view the status of the task.

Either a check mark appears next to the **Jobs** link to indicate that the file completed successfully and is ready to view:

After your job has completed successfully, Veritas recommends running a case backup before you start processing. (Refer to the section *"Creating Case Backups" in the System Administration Guide* for details on how to perform a case backup.)

Or, if an error occurred during discovery, in the Jobs window, the status of your load file job displays, with a link under the Actions column:

To view error details, you can check the status log (**System > Logs > View Logs**), or view a report to identify problem documents containing the errors. The report is particularly helpful in pinpointing the problem, enabling you to make the appropriate adjustments. See *"Run a Load File Discovery Errors Report" on page 67*.

To view the results from the Manage Sources tab

1. On the **Sources & Pre-Processing** screen, under the **Manage Sources** tab, your load file source appears with a colored status bar.
2. Hover the mouse over the status bar in the To Process column to view the Processing Detail popup.

   Note: If the discovery job failed (with a fatal exception) the Processing Detail will not display any data. (A grey bar indicates no content to be processed, regardless of a successful or failed discovery job.)

   Detail for completed discovery jobs includes a breakdown of items contained in valid or invalid Document Families, the number of errors in the file, and total number of imported items.
3. Click on the load file source itself to review your settings.

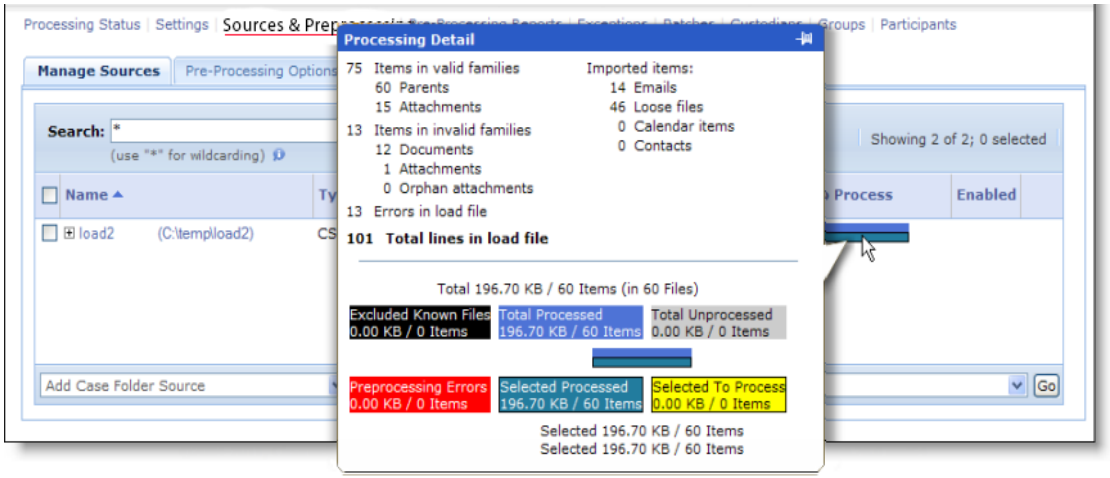
Discover New Data

If new files are added after the initial load file source was discovered, you can run discovery on the new files before the case is processed. From the **Sources & Pre-Processing** screen, select the source and choose **Discover new files for source**, then click **Go**.

Processing Your Case (without Discovery)

Refer to the section *"Case Administration" in the Case Administration Guide* when you have successfully imported and pre-processed your load file source, backed up your case, and are ready to process. See also *"Processing Exceptions" in the Case Administration Guide*.

After your processing job completes, you can again view status of the file, and any errors which may have occurred during processing. In the **Manage Sources** tab, hover the mouse over the status bar in the To Process column to view the Processing Detail popup.



For more information about each of the colored status sections, refer to the section *"Viewing Processing Detail" in the Case Administration Guide*.

Troubleshooting Load File Errors

This section describes the techniques you can use to troubleshoot failed or other errors in load file import jobs during discovery in the pre-processing stage.

- *"Troubleshooting Failed Jobs" on page 67*
- *"Contacting Technical Support" on page 72*

Troubleshooting Failed Jobs

If your load file fails during discovery, follow the steps in this section to troubleshoot using tips and techniques to investigate and correct issues related to load file import:

- *"Run a Load File Discovery Errors Report" on page 67*
- *"Identifying and Resolving Errors" on page 68*
- *"Checking Load File Formats and Requirements" on page 69*

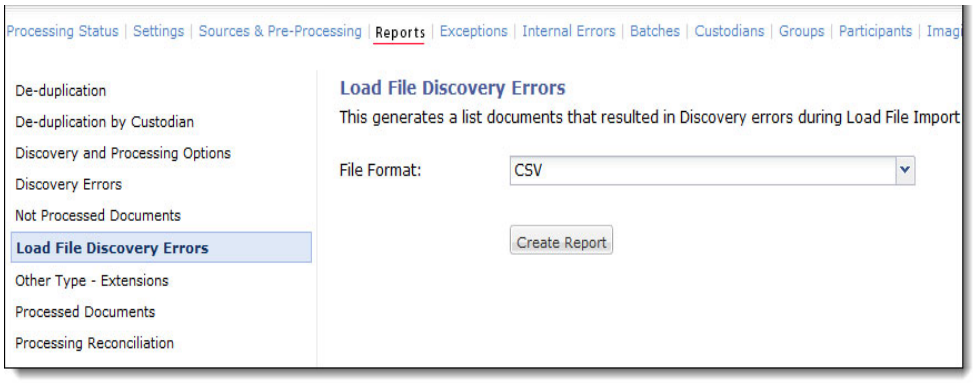
If you need further assistance after attempting to troubleshoot your issues first, see *"Technical Support" on page 8*.

Run a Load File Discovery Errors Report

When you click a link from the **Jobs** window, the status of the load file discovery job is displayed. If your job did not completed successfully, you can identify the problem-causing documents causing the failure by running a *Load File Discovery Errors* report and examining the errors. This allows you to address the issues, and adjust settings before processing the case.

For example, suppose the path specified for the load file is invalid. You can check the *Load File Discovery Errors* report for line item details.

Note: Path validation is done during the discovery phase and errors of this nature will be listed in the report.



The Load File Discovery Errors lists documents producing errors during discovery. Choose the format type (CSV) and click **Create Report**.

Identifying and Resolving Errors

Review information in the Load File Discovery Errors Report and use the results to pinpoint the errors. The issues may either be caused from incorrectly mapped settings, or the original load file could be incorrectly formatted.

Identifying Errors

Errors can be classified as one of three types: Fatal, non-fatal, or warnings:

Table 33: Error Classification

Error Type	Description	Effect	Recommended Action
Fatal Errors	Errors occurring when Discovery encounters an issue with load file format or mapping, which affects further processing of the load file.	The Discovery job is aborted. Failed status is displayed on the **Sources & Pre-Processing > Manage Sources** screen. The Discovery log includes detailed information on this kind of error.	View the log and resolve errors in order to complete Discovery of the source
Non-Fatal Errors	Errors occurring during Discovery specifically when a document causes processing issues.	The document on which the error occurred, and its family of documents are dropped. Discovery proceeds to process other documents in load file.	Run a Pre-Processing Errors Report to view all the non-fatal errors encountered during discovery.
Orphan	Documents dropped from processing due to incomplete load file definition for parent document and its attachments.	The document on which the error occurred, and its family of documents are dropped. Discovery proceeds to process other documents in load file.	Run a Pre-Processing Errors Report to view all the non-fatal errors encountered during discovery.
Warnings	Messages displayed when Discovery finds inconsistencies not affecting processing of documents.	Warnings are logged to inform users of such inconsistencies.	Run a Pre-Processing Errors Report to view all the warning messages encountered during discovery.

To resolve load file errors

- Do one or both of the following tasks to check for errors, depending on errors found:
  - Check the original load file for required fields and formats provided to you by the third party source. See general requirements in *"Load File Format Guidelines" on page 9* and *"Typical Load File Character Elements" on page 10*. For details, see examples in *"Checking Load File Formats and Requirements" in this section*, and in *"Checking Load File Formats and Requirements" on page 69* and *"Native Files" on page 70*.
  - From the **Sources & Pre-Processing > Manage Sources** tab, click the load file source to review your load file settings.
  - Check the Status logs. Discovery may display a fatal error even if the **Jobs** window indicates it was successful. From the **Sources & Pre-Processing** screen, if hovering over the "To Process" bar does not show any information, be sure to check the status log from **System > Logs > View Logs** tab, then apply filters to narrow the list.

Checking Load File Formats and Requirements

Check the examples in this section to ensure load files are properly formatted and pre-processed according to the file type. Alternatively, refer to these sample formats as another way to troubleshoot errors that may have occurred during pre-processing.

Email Files

The producing party should provide a TIFF image of the email and the attachment(s), and a copy of the native attachment file(s).

The text and metadata of the email and the attachment(s) are extracted and entered in the appropriate fields and provided as an ASCII delimited text file.

The following table is an example of the data required for Email documents contained in a load file source.

Table 34: Load File Requirements for Email Files

Field	Example	Description
BEGNUM	BT 000001	Beginning Imported number of email
ENDDUM	BT 000008	Ending Imported number of email
BEGATTACH	BT 000009	First Imported number of attachment(s)
ENDATTACH	BT 000015	Last Imported number of attachment(s)
Email Metadata		
CUSTODIAN	John Smith	Mailbox where email was stored
FROM	John Smith	For email
TO	Janice Coffman	For email
CC	Frank Thompson	For email
BCC	John Cain	For email
SUBJECT	Changes to Access Database	Subject of the email
DATE_SENT	10/10/2005	Date the email was sent
TIME_SENT	07:05 PM	Time the email was sent
DATE_RECVD	10/10/2005	Date the email was received
TIME_RECVD	07:05 PM	Time the email was received
INTFILEPATH	Personal Folders/Deleted Items	Folder location of email
File - Attachment Metadata		
FILE_EXTEN	(Email), DOC (attachment - ex. Word Document)	The file extension will vary depending on whether the document is a parent email or a child attachment
AUTHOR	John Smith	Attachment metadata
DATE_CREATED	10/08/2005	Attachment metadata
DATE_MOD	10/19/2005	Attachment metadata

Table 34: Load File Requirements for Email Files

Field	Example	Description
MD5_Hash	d41d8cd98f00b204e9800998ecf8427e	MD5 Hash value of the file
PATH_FILE	J:\Shared\Smith\070103\ Meeting Minutes.doc	Path where the file was originally stored
Extracted Text from Email or File		(Body text of the email or attachment)
TEXT	From: Smith, John [XYZ Corp] Sent: Friday, July 11, 2003 4:42 PM To: Coffman, Janice [CDT Corp] Subject: Board Meeting Minutes for 7/1/03 Janice; Attached is a copy of the July Board Meeting Minutes for your review. Please let me know if you have any questions. John Smith Assistant Director Information Technology Phone: (202) 555-1111 Fax: (202) 555-1112 Email: jsmith@xyz.com	

The delimited text file must include a header record. The preferred delimiters for each of the following formats for the file are:

- **Field Separator**: Comma (,) - ASCII character 20
- **Text Qualifier**: Quote (") - ASCII character 254
- **Newline**: - ASCII character 174

Native Files

Native files will be delivered with an ASCII delimited file containing the metadata associated with the files, text extracted from the native file, and a directory path to the native file.

The following table is an example of the data required for native documents contained in a load file source:

Table 35: Load File Requirements for Native Files

Field	Example	Description
DOCID	GT000001	Unique sequential number
TEXT	Meeting Minutes for Teleconference 10/1/03 Discussion over employee stock options transpired. Decision was made to offer the options as part of the employee's Christmas bonus. Announcement was made regarding Roland Moore being promoted to Assistant Director	Text extracted from the native file
LINK	D:\Production\100103 Meeting Minutes.pdf	Hyperlink to native file (listed as file name)
AUTHOR	John Smith	Attachment metadata
DATE_CREATED	10/08/2005	Attachment metadata
DATE_MOD	10/09/2005	Attachment metadata
FILE_SIZE	765,952	Attachment metadata (in bytes)
PATH_FILE	J:\Shared\Smith\100103\ Meeting Minutes.doc	Path where the file was originally stored

Optionally, native files can be delivered in Custodian-named folders.

For media formats, data can be delivered on CD, DVD, or hard drive. The smallest number of media is preferred.

Contacting Technical Support

If you have tried the applicable solutions described in this section and your load file import issues persist, you can contact technical support. See *"Technical Support" on page 8* for assistance.

Appendix A: Product Documentation

The table below lists the administrator and end-user documentation that is available for the Veritas eDiscovery Platform product.

Veritas eDiscovery Platform Documentation

Document	Comments
Installation and Configuration	
Installation Guide	Describes prerequisites, and how to perform a full install of the Veritas eDiscovery Platform application
Upgrade Overview Guide	Provides critical upgrade information, by version, useful prior to upgrading an appliance to the current product release
Upgrade Guide	Describes prerequisites and upgrade information for the current customers with a previous version of the software application
Utility Node Guide	For customers using utility nodes, describes how to install and configure appliances as utility nodes for use with an existing software setup
Distributed Architecture Deployment Guide	Provides installation and configuration information for the Review and Processing Scalability feature in a distributed architecture deployment
Getting Started	
Navigation Reference Card	Provides a mapping of review changes from 10.x compared to 9.x, 8.x compared to 7.x and 7.x compared to 6.x
Administrator's QuickStart Guide	Describes basic appliance and case configuration
Reviewer's QuickStart Guide	A reviewer's reference to using the Analysis & Review module
Tagging Reference Card	Describes how tag sets and filter type impact filter counts
User and Administration	
Legal Hold User Guide	Describes how to set up and configure appliance for Legal Holds, and use the Legal Hold module as an administrator
Identification and Collection Guide	Describes how to prepare and collect data for processing, using the Identification and Collection module
Case Administration Guide	Describes case setup, processing, and management, plus pre-processing navigation, tips, and recommendations. Includes processing exceptions reference and associated reports, plus file handling information for multiple languages, and supported file types and file type mapping
System Administration Guide	Includes system backup, restore, and support features, configuration, and anti-virus scanning guidelines for use with Veritas eDiscovery Platform
Load File Import Guide	Describes how to import load file sources into Veritas eDiscovery Platform
User Guide	Describes how to perform searches, analysis, and review, including detailed information and syntax examples for performing advanced searches

Veritas eDiscovery Platform Documentation

Document	Comments
Imaging Tool Upgrade Guide	Provides details about the Imaging Tool Upgrade feature and how to perform Imaging Tool Upgrade after the eDiscovery Platform appliance is upgraded to version 10.0, workflows affected when the cases are upgraded or not upgraded, and frequently asked questions (FAQs).
Export and Production Guide	Describes how to use and produce exports, productions, and logs (privilege and redaction logs)
Transparent Predictive Coding User Guide	Describes how to use the Transparent Predictive Coding feature to train the system to predict results from control data and tag settings
Audio Search Guide	Describes how to use the Audio Search feature to process, analyze, search and export search media content
Reference and Support	
Audio Processing	A quick reference card for processing multimedia sources
Audio Search	A quick reference card for performing multimedia search tasks
Legal Hold	A quick reference card of how to create and manage holds and notifications
Collection	A quick reference card of how to collect data
OnSite Collection	A quick reference for performing OnSite collection tasks
Review and Redaction	Reviewer's reference card of all redaction functions
Keyboard Shortcuts	A quick reference card listing all supported shortcuts
Production	Administrator's reference card for production exports
User Rights Management	A quick reference card for managing user accounts
Online Help	
Includes all the above documentation (excluding Installation and Configuration) to enable search across all topics. To access this information from within the user interface, click **Help**.	
Release	
Release Notes	Provides latest updated information specific to the current product release