

ZyLAB eDiscovery

3.11 What's New

Manual



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What's New Manual

The ZyLAB eDiscovery 3.11 What's New Manual describes only the major new features of the ZyLAB eDiscovery Suite starting with the 3.11 release of the eDiscovery Bundle. For a complete list of all features, including the ones that have smaller end-user impact, please see the ZyLAB Release Notes 3.11 document included in this software package.

This manual also includes the new features from the ZyLAB eDiscovery 3.10 Controlled Release.

Legal Review

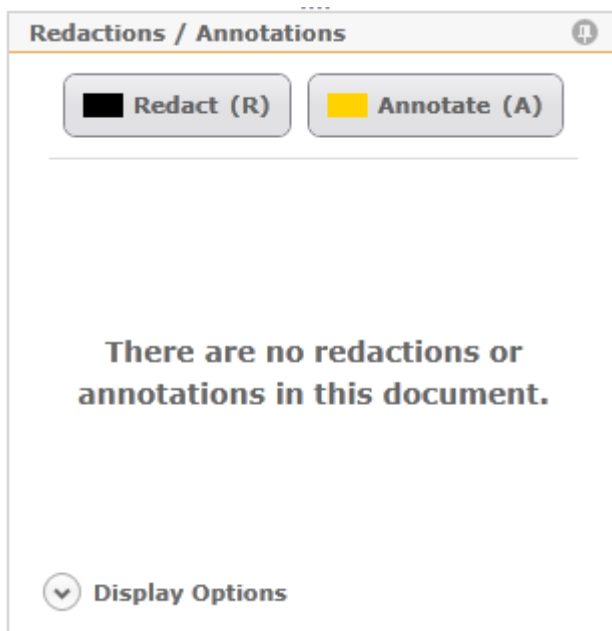
Features for Legal Reviewers

Redaction Reason Text and Code

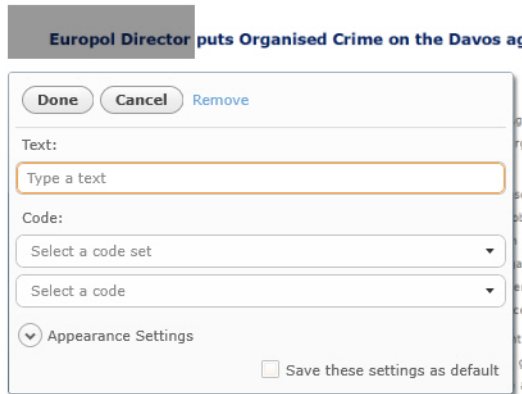
You can now redact documents and include redaction text and code at the same time.

Instructions

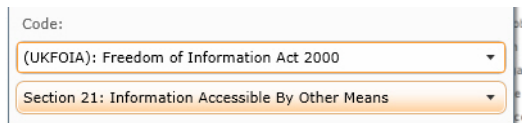
1. To add a redaction, press the R on your keyboard or click the Redact (R) button. To add an annotation, press the A on your keyboard or click the Annotate (A) button.



2. Draw a rectangle over the area you would like to redact or annotate (or press ESC to cancel).
 - Fill the redaction with Text and/or a Code.

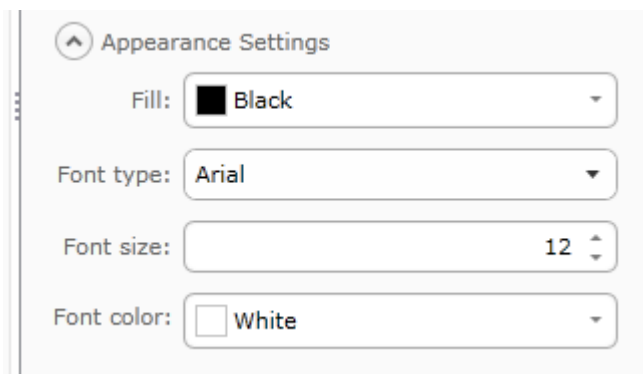


- To add a code, first select a code set, then the correct part of that code set.

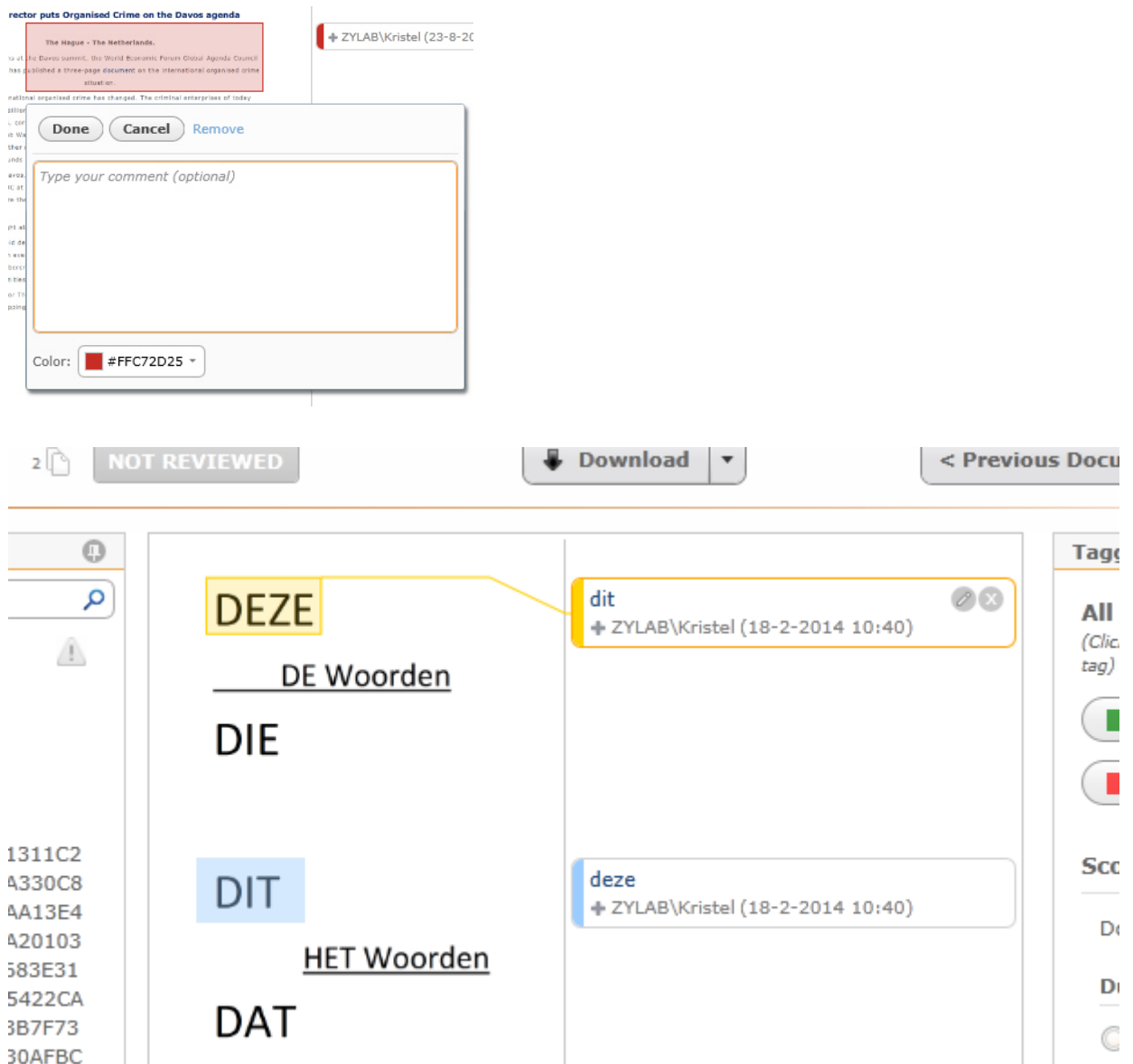


- Define the Appearance Settings (and optionally save these settings as default). You can adjust the following settings:

- Fill (background color)
- Font type
- Font size
- Font color



- Create an annotation by typing your comment and defining the color that is used to mark the selected area and related text.

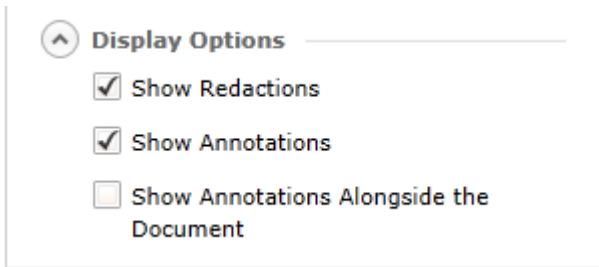


3. To approve, click Done (or push the Enter key).
4. To reject, click Cancel (or push the Escape key).
5. A summary with all created redactions/annotations will appear. The following information is included: Who redacted/annotated and when, on which page is the redaction/annotation located and what is the (overlay) text.

Some or all redactions/annotations can be selected and subsequently edited or removed.

- Remove or edit (your own) redactions/annotations in the document by double-clicking on them. Select Remove or edit the settings.
- Move (your own) redaction/annotation by double-clicking on it and dragging it to another position on the same page. When finished, click Done (Enter).
- Resize (your own) redaction/annotation by double-clicking on it, hold a corner or side with the mouse and drag it to a new position. When finished, click Done (Enter).

6. Define if/how the redactions and/or annotations are shown with Display Options.



Display Options

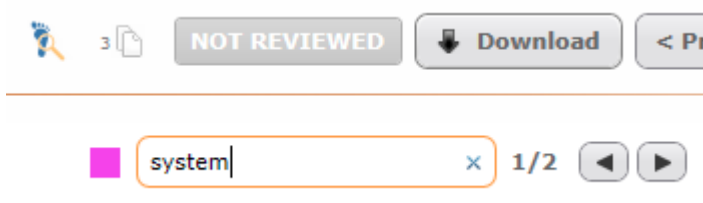
- Show Redactions
- Show Annotations
- Show Annotations Alongside the Document

Search within a Single Document

You can now search within a single document.

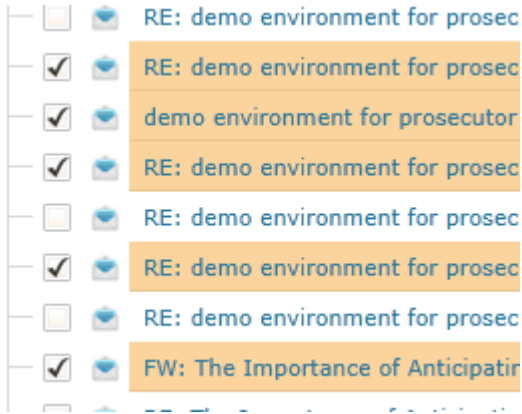
Search within the document

In Document View, press Ctrl+F to open the search box. Define a search and press Enter. The results will be highlighted.

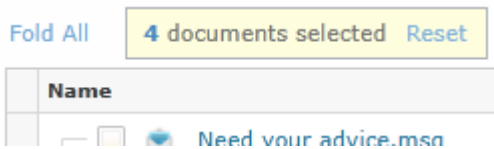


Shift+Click Selection of Documents

To bulk select multiple contiguous items from the list (in Document List View), select an item, press the Shift button and select another item from the list (Shift+Click). The selected documents and all documents in between will be selected. Add individual items to this group by selecting them. Deselect items by selecting them again.



Click Reset to deselect all items:



Create and Manage Mini-Productions

You can now produce a set of documents as (numbered) PDF files that can be downloaded and shared easily.

Mini-Produce Documents/Selection

1. Make sure that you want to mini-produce all (selected) documents in the result list.

You can either Mini-Produce **Documents** or **Selection**. If you did not select specific documents from the list, you will produce all documents present in the result list.

2. Click Mini-Produce Documents (or Selection).

The Mini-Production screen will appear.

Mini-Production

Mini-Production Properties

Mini-Production name:

Produce Document Numbers

Document Numbers Settings

| | | | |
|--|---|---|--|
| <p>Prefix</p> <input style="width: 90%;" type="text"/> <p><small>Letters, numbers, hyphen, dash, semicolon and brackets.</small></p> | <p>Number of digits</p> <input style="width: 80%;" type="text" value="10"/> | <p>Start number</p> <input style="width: 90%;" type="text" value="0000000000"/> | <p>Suffix</p> <input style="width: 90%;" type="text"/> <p><small>Letters, numbers, hyphen, dash, semicolon and brackets.</small></p> |
|--|---|---|--|

Preview : 0000000000

Start Mini-Production

- Adjust the Mini-Production name if needed.
- To produce numbered PDF files, make sure the check box 'Produce Document Numbers' is selected. If this check box is not selected, the original name is used. To produce files with bates numbers, select Produce Documents/Selection.
- Define the Document Numbers Settings. This is how the PDF files will be numbered.
- Click Start Mini-Production.

Manage Mini-Productions

1. For an overview of all created Mini-Productions and the ability to remove them, select the button 'Manage Mini-Productions'.
2. In the Manage Existing Mini-Productions, you can view all completed, in progress or failed mini-productions.

Manage Existing Mini-Productions

The screenshot displays two panels for managing mini-productions. The top panel, titled 'In Progress', shows a production named 'Sprint 3- production names configuration 23-08-2016 15-05-28' with a progress bar and the text 'Producing 0 of 5 documents'. A 'Cancel' button is located at the bottom right of this panel. The bottom panel, titled 'Completed', shows a production named 'Sprint 3- production names configuration 23-08-2016 13-18-55' with a green checkmark icon and the text '9 families | 10 documents |'. Two buttons, 'Download as zip' and 'Remove', are located at the bottom right of this panel.

- Click the 'Cancel' button to cancel a mini-production.
- Click the 'Download as zip' button to download a mini-production with PDF files.
- Click the 'Remove' button to remove a mini-production.

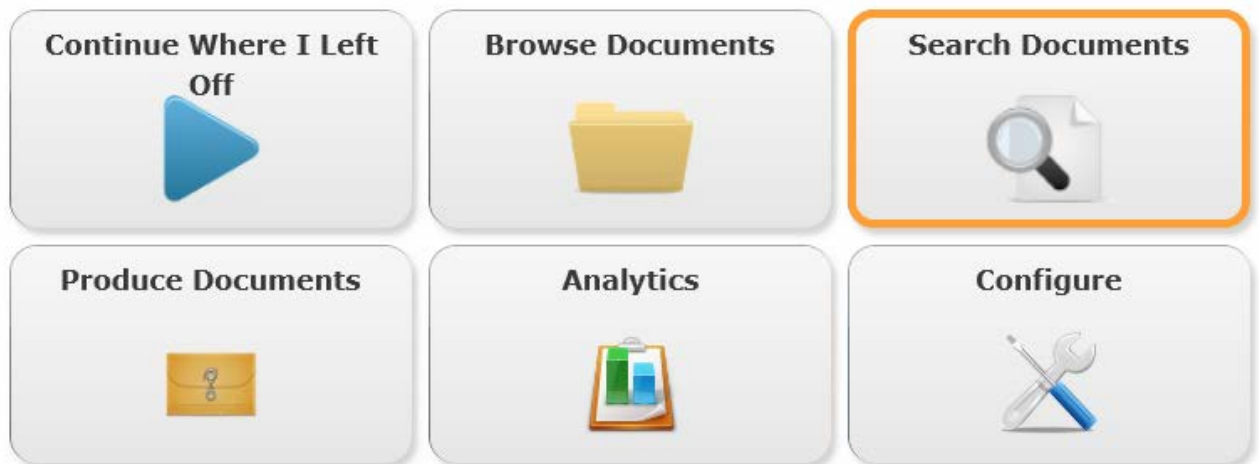
Features for Litigation Support Administrators or Power Reviewers

Exclude Inline Attachments from Production

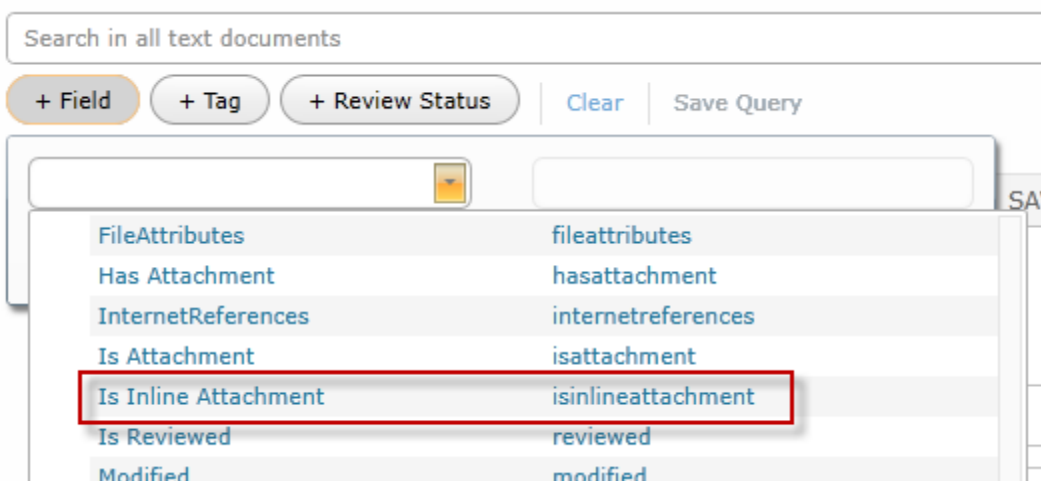
You can now exclude inline attachments (embedded objects) from your production. In most situations, inline attachments in emails are part of a signature or represent a logo. Attachments like, for example, a screenshot or a PDF file, will still be included in the production.

Instructions

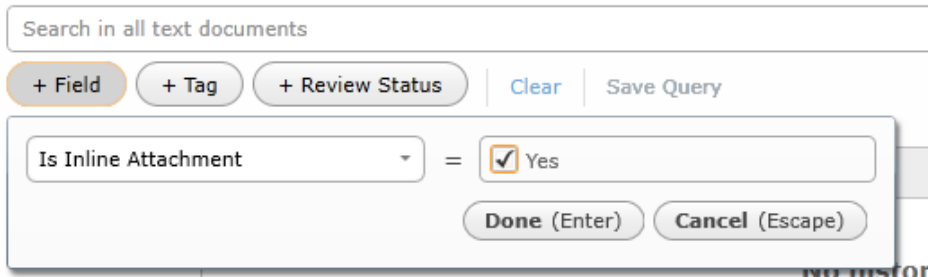
1. Search for Inline Attachments. You can do that via Search Documents (or Produce Documents > New Production).



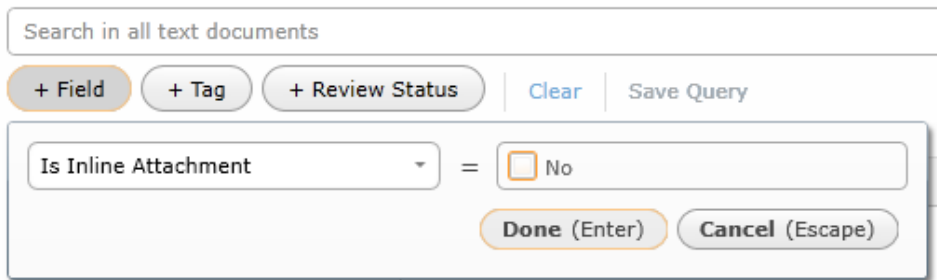
2. Select the 'Is Inline Attachment' Field.



3. Deselect the 'Yes' checkbox.

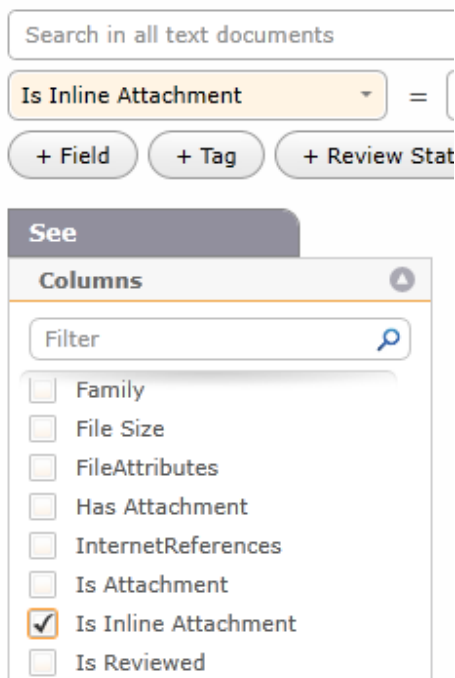


4. Click Done.



5. Click Search. The Search Results will appear.

6. Select the 'Is Inline Attachment' Column to review your search results.



Result

Now, when creating a production or report based on this result list, only documents and their attachments will be included. Inline attachments (embedded objects) will be excluded.

Tags

Tags enables the (Litigation Support) Administrator to define the tags a Reviewer is allowed to add. The Administrator can make changes while Reviewers are active in the Matter.

In 3.10, you can now edit or delete tag list items, see step 6.

Instructions

1. On the Legal Review Home page, go to Configure > Tags.



2. The Configure Tags screen appears.

Please make sure that the permission "Tagging – edit configuration" that allows a Litigation Support Administrator to add tags has been selected. If this permission is not selected, the Litigation Support Administrator will not be able to create new tags. Select this Role Permission for the Role assigned to the Litigation Support Administrator in Configure > Security > Roles.

Important: All preparations for creating tags should be done before creating a new Legal Review Matter. Make sure you are working with a Matter that is created with Legal Processing 3.9 or higher, as this will create a Legal Review template with the correct empty fields needed for creating tags.

- For creating new tags in the Legal Review user interface you need to have at least one field in the Legal Review Matter template (default39.xml) with

```
<IsUserDefinedTagField>true</IsUserDefinedTagField>
```

- The maximum number of tags that can be created in Legal Review is limited by the number of fields with `<IsUserDefinedTagField>true</IsUserDefinedTagField>` and `<DbType>Bit</DbType>`.

- By default the Legal Review template contains several fields reserved for new tags (more fields can be added if it is required):

- 4 fields for 'Bit' tags
- 2 fields for one-to-many tags
- 2 fields for many-to-many tags

- For creating tags with no interaction contract (None), only one Bit field is needed.

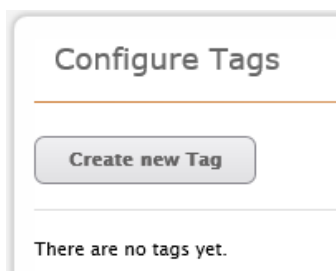
```
<FieldInfoDto>
  <IsUserDefinedTagField>true</IsUserDefinedTagField>
  <Name>UserDefinedTagField1</Name>
  <DbType>Bit</DbType>
  <IsIndexed>true</IsIndexed>
  <IsRequired>>false</IsRequired>
  <IsFullTextSearchable>>false</IsFullTextSearchable>
  <IsUserVisible>>false</IsUserVisible>
</FieldInfoDto>
```

- For creating tags with interaction contract Single Select, at least one Bit field and one OneToMany fields are needed.

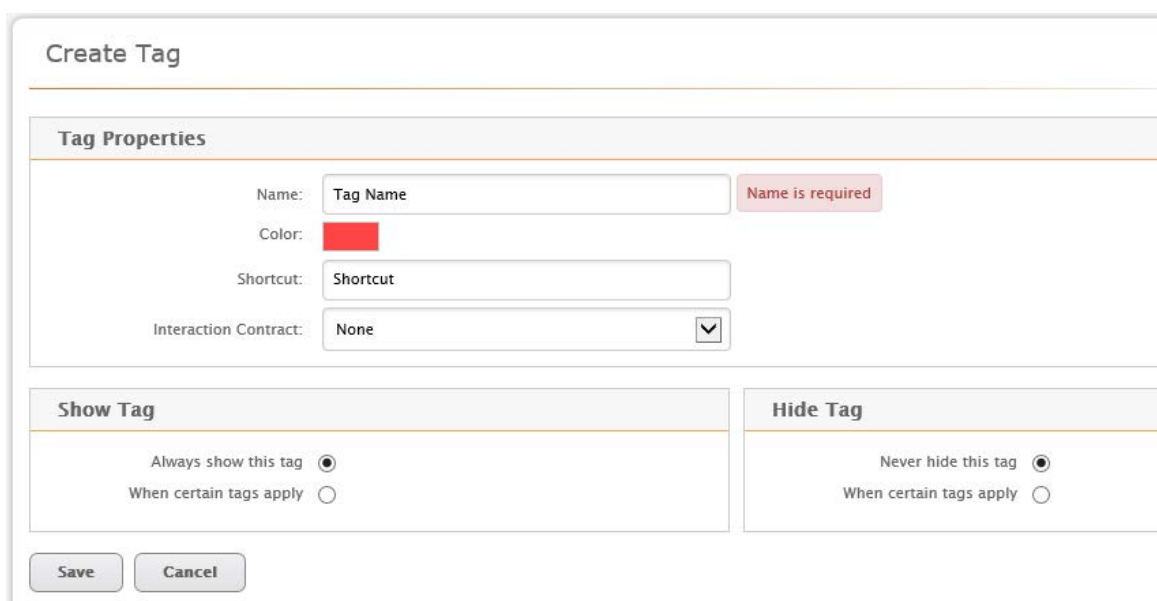
```
<FieldInfoDto>
  <IsUserDefinedTagField>true</IsUserDefinedTagField>
  <Name>UserDefinedTagField5_Dic</Name>
  <FieldType>OneToMany</FieldType>
  <Dictionary xsi:type="DictionaryReference">UserDefinedTagDict1</Dictionary>
  <IsIndexed>true</IsIndexed>
  <IsRequired>>false</IsRequired>
  <IsFullTextSearchable>>false</IsFullTextSearchable>
  <IsUserVisible>>false</IsUserVisible>
</FieldInfoDto>
```

- All the tag types that are going to be created should previously be specified in the Definitions.xml file (Tag type = Interaction contract). Restart IIS Service for applying the changes in the Definitions.xml file.

- To create a new tag, select the "Create new Tag" button.

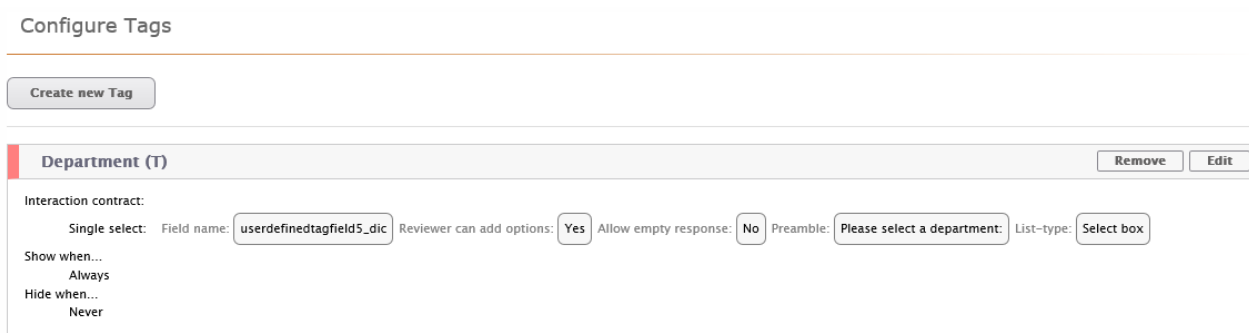


- The Create Tag screen appears.



- Define the Tag Properties:

- Name**
Define a name for the tag. This is how the Reviewers will see it.
On the Tagging Configuration overview page, the Administrator can also see the Field Name of the tag.



- Color**
Use the color picker to select a unique color for the tag.

- **Shortcut**
Define a shortcut key for the tag. This should be a single letter (Alphanumeric, Arrow or Page buttons).
- **Interaction Contract**
Select the Interaction Contract type. You can choose from:
 - **None**
The tag will have no additional value. Continue with step 8.
 - **Single select**
The tag can be given an additional value. Continue with step 6.

6. If Reviewers should be able to add an additional value to the tag, select 'Reviewer can add options'.

Create Tag

Tag Properties

Name:

Color:

Shortcut:

Interaction Contract: ▼

Reviewer can add options

Allow empty response

Preamble:

List-type: ▼

Select List Items

Finance ✕

Legal ✕

Support ✕

Show Tag

Always show this tag

When certain tags apply

Hide Tag

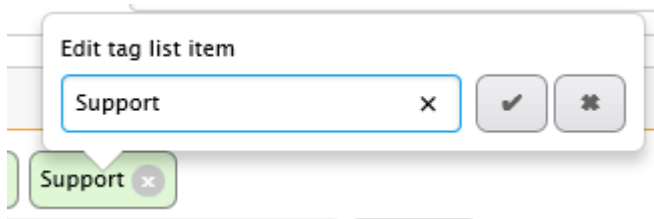
Never hide this tag

When certain tags apply

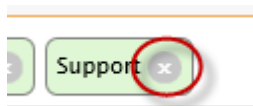
- **Preamble**
Explain the options the Reviewer can choose from. For example, 'Please select a department:'.

- List-type
Define if Reviewers can select a box or a radio button.
- Select List Items
Define the tag options a Reviewer can choose from.
Type an item to add and click Add.

To edit a Tag List Item, select it. Modify the tag text or remove it by clicking the cross. After you have defined a new tag, click Apply or Discard.



To remove the tag, click the cross in the green box:



7. If Reviewers should not be forced to add an additional value to the tag, select 'Allow empty response'.



8. Define when the tag is shown to the Reviewer.

- Always show the tag
The Reviewer can always see this tag.
- When certain tags apply
The Reviewer can only view the new tag if he has selected another tag first.
 - All of these tag(s) apply
Only if these tag(s) are selected first by the Reviewer, the new tag is shown.
For example, the Reviewer first selected the tag Privileged. After that, he can see the new tag.

- And any of these tag(s) apply
And if one of these tag(s) are selected, the new tag is shown.
For example, the Reviewer first selected the tag Privileged, and also the tag German or French. Only after those two selections, he can see the new tag.

9. Define when the tag is hidden from the Reviewer.

- Never hide this tag
The Reviewer can always see this tag.
- When certain tags apply
The Reviewer cannot view the new tag if he has selected another tag first.
 - All of these tag(s) apply
Only if these tag(s) are selected first by the Reviewer, the new tag is hidden.
For example, the Reviewer first selected the tag Responsive. After that, the new tag is hidden and cannot be selected anymore.
 - And any of these tag(s) apply
And if one of these tag(s) are selected, the new tag is hidden.
For example, the Reviewer first selected the tag Responsive, and also the tag Confidential or Privileged. Only after those two selections, the new tag is hidden.

10. When you are finished, click Save.

Result

After Legal Review is restarted, Reviewers can use the new Tag.

To remove a tag, you have to untag all records from that tag and then hide the unneeded tag from users by using Security roles.

Security

A new Role Permission (Tagging - Edit Configuration) has been added that allows an Administrator to add tags. Select this Role Permission for the Role assigned to the (Litigation Support) Administrator in Configure > Security > Roles.

- Manage security
- Produce documents
- Redact documents
- Search
- Tagging - apply tags (any)
- Tagging - bulk tag
- Tagging - edit configuration
- Tagging - see tags (any)
- View audit log

[Remove](#)

[Edit](#)

Auditing

Audit entries are created for each tag creation. The audit event includes the Event Type (enable tag), Time Stamp, User, User IP Address, and all settings chosen for each tag enabled.

Show Indexing Status

Two new columns are added: Indexing Error Code and Indexing Error Message. These columns show whether a document was, for example, password protected, unsupported, corrupt, gave a timeout during indexing, etc.

Sort By: **ID (Ascending)** [Add more sorting](#)

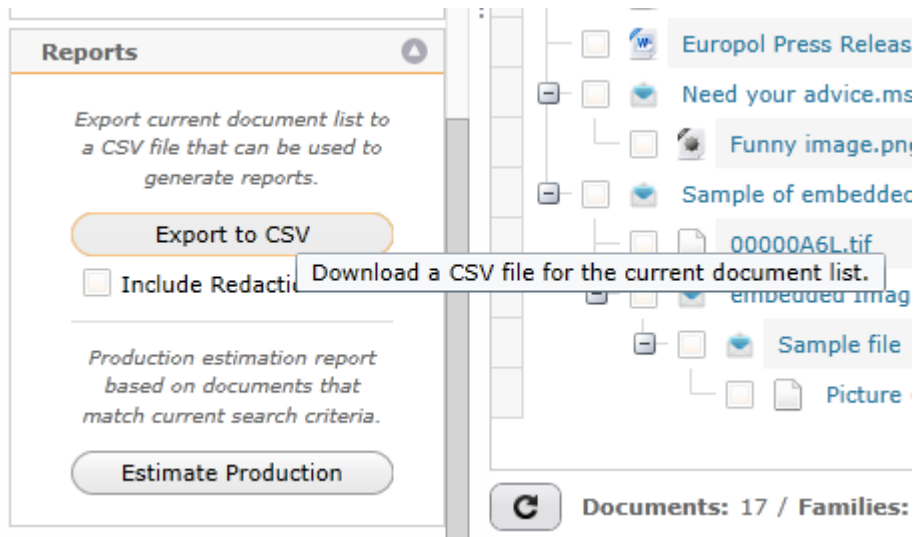
| Status | Indexing Error Type | IndexingErrorMessage |
|----------|---------------------|--|
| REVIEWED | 2 | WP error |
| REVIEWED | 9 | Extractor error |
| REVIEWED | 28677 | Failure on closing field value reader |
| REVIEWED | 0 | Success |
| REVIEWED | 14 | Unindexable file |
| REVIEWED | 65535 | Invalid error |
| REVIEWED | 32771 | Warning: The number of indexed documents is exceeding limits. You mu |

Export Redaction Information

You can now add Redaction Information to reports in CSV format.

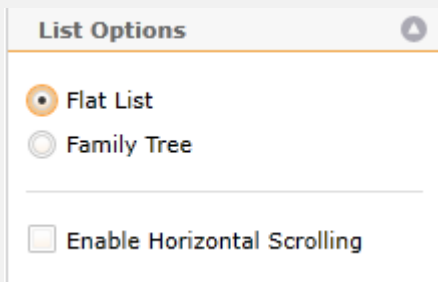
Instructions

1. In Document List View, beneath the Do tab, select the Reports panel.



2. Click Export to CSV.

The report is generated faster if you select 'Flat List' in the List Options panel.



Exporting the 'Family Tree' list is much more resource consuming, especially on matters with 10+ mln of documents and when a large number of documents (more than 1 million) is being exported.

- Select the check box 'Include Redaction Info' if you want to include Redaction information (on which page, who redacted it and when it was redacted, redaction code and justification). All information of manual redactions will always be added. However, when creating the report, not all auto-redactions might have been processed already. Therefore, for auto-redactions, most fields can be empty, only indicating that auto-redaction will be performed on that document.

Legal Processing

Features for Litigation Support Administrators

Enable NSRL Filtering

To show that NSRL (or NIST) exclusions exist, you can now select the check box 'Enable NSRL Filtering'. With that check box selected, it is logged and reported that NSRL files existed in the original collection, but were excluded.

Now, when creating a new matter, you can enable NSRL filtering for all collectors.

New Matter (ver. 1.0)

General | File Groups | Collection | Processing | Schedule | Security

Matter Name:

Description:

Start Date:

Run in Compliance Mode:

Enable NSRL Filtering:

Legal Review Template:

Index/WebClient short name:

Shared Location:

Filtering Report

Categories of filtered documents are: Documents Excluded due to No Processing Rule Assigned, NSRL Exclusions. This reporting works for all Legal Processing collectors.

No Processing Rule Assigned

If no processing rule is associated with a document, then that document is skipped during processing. In the Filtering Report you can view which files existed in the original collection, but were excluded.

NSRL Exclusions

In the Filtering Report you can view which files existed in the original collection, but were excluded due to NSRL (or NIST) exclusions.

| Job ID | Source | Custodian | Source | Location | Original FileName | Exten... | Mime Type | Skipped Reason | SourcePath |
|--------|--------|-----------|------------|----------------------------|------------------------------|--|-------------------|---------------------|---|
| 26 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | vgacls.fon | fon | NSRL Filtering | C:\Filtering Report\TC001498\TestData\vgacls.fon |
| 27 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | vgacls.fon | fon | NSRL Filtering | C:\Filtering Report\TC001498\TestData\vgacls.fon |
| 28 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | VLADIMR.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\VLADIMR.TTF |
| 29 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | WINGDNG2.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\WINGDNG2.TTF |
| 30 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | webdings.ttf | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\webdings.ttf |
| 31 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | wingding.ttf | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\wingding.ttf |
| 32 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | VIVALDL.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\VIVALDL.TTF |
| 33 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | VNERITC.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\VNERITC.TTF |
| 34 | 91 | 25001 | Jon Snow | Jon Snow Laptop | C:\Filtering Report\TC001498 | WINGDNG3.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001498\TestData\WINGDNG3.TTF |
| 35 | 91 | 25002 | Jon Snow | Jon Snow desktop computer | C:\Filtering Report\Emails | FW_Cake_in_the_canteen_from_Elmiria.msg | application/x-msg | No Processing Rules | C:\Filtering Report\Emails\FW_Cake_in_the_canteen_from_Elmiria.msg |
| 36 | 91 | 25002 | Jon Snow | Jon Snow desktop computer | C:\Filtering Report\Emails | Day_off_this_Friday_instead_of_Tuesday.msg | application/x-msg | No Processing Rules | C:\Filtering Report\Emails\Day_off_this_Friday_instead_of_Tuesday.msg |
| 37 | 91 | 25002 | Jon Snow | Jon Snow desktop computer | C:\Filtering Report\Emails | Jon_Snow_is_looking_for_new_job.msg | application/x-msg | No Processing Rules | C:\Filtering Report\Emails\Jon_Snow_is_looking_for_new_job.msg |
| 38 | 91 | 25002 | Jon Snow | Jon Snow desktop computer | C:\Filtering Report\Emails | no_match_in_attach.msg | application/x-msg | No Processing Rules | C:\Filtering Report\Emails\no_match_in_attach.msg |
| 39 | 91 | 25002 | Jon Snow | Jon Snow desktop computer | C:\Filtering Report\Emails | Hmthighliting_on_PDF_.msg | application/x-msg | No Processing Rules | C:\Filtering Report\Emails\Hmthighliting_on_PDF_.msg |
| 40 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | vgacls.fon | fon | NSRL Filtering | C:\Filtering Report\TC001450\vgacls.fon |
| 41 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | vgacls.fon | fon | NSRL Filtering | C:\Filtering Report\TC001450\vgacls.fon |
| 42 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | VIVALDL.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001450\VIVALDL.TTF |
| 43 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | VNERITC.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001450\VNERITC.TTF |
| 44 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | webdings.ttf | ttf | NSRL Filtering | C:\Filtering Report\TC001450\webdings.ttf |
| 45 | 91 | 25003 | Arya Stark | Arya Stark private folders | C:\Filtering Report\TC001450 | VLADIMR.TTF | ttf | NSRL Filtering | C:\Filtering Report\TC001450\VLADIMR.TTF |

Improved Concordance Collector

In 3.10, field mapping is added to the Concordance Collector.

The Concordance Collector imports documents using a delimited text file, the load file (usually in the .dat format). This file contains fields that are linked to documents. When importing these documents the fields and field values from the load file are added to the metadata of the corresponding documents.

A Concordance load file consists of 4 folders: DATA, IMAGES, NATIVES, and TEXT.

The DATA folder contains two related text-delimited files, the Concordance Load File (with a .dat extension) and the Opticon Cross Reference File (with an .opt extension). The Concordance Load File contains the fielded metadata information. The Opticon Cross Reference File has one Bates Number per line and contains the paths to the images.

The IMAGES folder contains subfolders with TIFF images files, named by Bates Number and ending with the extension .tif.

The NATIVES folder contains native versions of files, used to generate the .tif images and .txt files.

The TEXT folder contains single page text files containing ASCII text of processed ESI, named by Bates Number and ending with the extension .txt.

Add Concordance Collector (Default configuration)

Settings

Concordance Format Concordance default ▼

Comma (020) ▼

Quote " (254) ▼

Newline ␣ (174) ▼

First line contains header

Delimited file Browse

Image load file Browse

| Field name | Format | Field link | Metadata field name |
|------------------------------------|--|------------|---------------------|
| Date format | dd/mm/yyyy ▼ | | |
| Collect images and natives | Only images ▼ | | |
| Directory file path for images | <input type="text"/> | | |
| Substitution path for images | <input type="text" value="Enter a path or click 'Browse' to select a path"/> | | Browse |
| Directory file path for natives | <input type="text"/> | | |
| Substitution path for natives | <input type="text" value="Enter a path or click 'Browse' to select a path"/> | | Browse |
| Directory file path for text files | <input type="text"/> | | |
| Substitution path for text files | <input type="text" value="Enter a path or click 'Browse' to select a path"/> | | Browse |
| Retrieve text files via browsing | <input type="checkbox"/> | | |
| Field name for text content | <input type="text" value="zyTEXT"/> | | |
| Create Zyxmltiff files | <input type="checkbox"/> | | |
| Validate source data before adding | <input checked="" type="checkbox"/> | | |

File Types to Collect

All

[Add New](#)

Add
ESC Close

Settings

Concordance Format

There are three default export methods in Concordance. Select one of them (Concordance default (using the .dat format (with as Comma (020), as Quote P (254), and as Newline ® (174)), Comma delimited (CSV), or Tab delimited) and the **Comma**, **Quote** and **New Line** fields will be automatically set to the correct values. If you have set a Custom Format while exporting, set the Format option to custom and define the Comma, Quote and New Line values yourself. Please make sure to provide the same settings as the export settings.

First line contains header

When importing a .DAT file, there is an option to skip the first line of that file because the .dat file can contain a header row, listing the field names used in the database. If the first line is skipped, this option should also be used during collection.

First line with the field names used in the database:

```
pbates numberpbates rangepbstart batespbend batesp etc.
```

The following lines include the values for those fields:

```
p0000000013p0000000013:0000000013p0000000013p etc.
```

```
p0000000014p0000000014:0000000014p0000000014p etc.
```

Delimited file

The user should point to the exported Concordance Load File (*.dat) which contains the fielded metadata.

Image load file

The user should point to the Opticon Image Cross-reference file (*.opt) which contains the paths to the images.

Fields

Map fields (from load file fields to ZyLAB fields).

Attention: To see the relationship between attachments and parent documents (the families) in Legal Review, add application/zyxmtiff to the KnownFamilyTypes section of the Review.Standalone.Winservice.config file (this file can be found at \\Program Files (x86)\ZyLAB\EDiscovery\LegalReview\).

To prevent that the parent is missing (when you prefer natives to be collected), make sure you add application/msg to the KnownFamilyTypes section of the Review.Standalone.Winservice.config file.

Field definitions

- **Field name**
The field names as used in the delimited and image load file. Choose which fields you want to add as meta data.
- **Format**
Define the format of the field. Choose from None, Text, Date, DateTime
- **Field link**
Define how the field will be linked. Choose from None, DocumentId (used to link a field from the dat file with the opt file), Link to native (natives are linked to natives), Link to parent (images (ZyXMLTiff files) are linked to images).
- **Metadata field name**
Fieldname mapping for field in the .dat and .opt file to fields in meta data. Should also be defined in the the LegalReview template.

Date Format

Date format should be set to the same format as the file is exported in from Concordance, e.g. MMDDYYYY, DDMMYY.

Collect images and natives

Choose between collecting 'Only images', 'Only natives' or 'Both images and natives'.

Please note that if, for a document (with file key BAT000001), both a native file and an image file (one or more TIFF pages) are present, you can either collect both the native and the image, only the image or only the native.

However, if for that same document (with key BAT000001) only a native file or only an image file is present, that single native or image file will be collected, no matter what selection was made for this setting. For example, if only a native file is present and you selected to collect only images, the native file will be collected.

Directory file path for images

Define the path to the folder where the Concordance images were originally exported. This path (for example, C:\Program Files (x86)\LexisNexis\Concordance 10\Images\) can be found in the Opticon Cross-Reference File (*.opt).

Substitution path for images

The UNC path to the current images folder on your file system. You should be able to browse to this file location.

Directory file path for natives

Define the path to the folder that contains the native (documents). For example, C:\Program Files (x86)\LexisNexis\Concordance 10\Natives\). This path is defined in the .dat file. The field name that is

used to define the path, should be present in the config file of the Concordance Collector. For example (the ZyIndexFieldName can be left empty):

```
<Field name="LINKTONATIVES" type="LinkToNatives" zyIndexFieldName="" />
```

Substitution path for natives

The UNC path to the current natives folder on your file system. You should be able to browse to it.

Directory file path for text files

Define the path to the folder that contains the native (documents). For example, C:\Program Files (x86)\LexisNexis\Concordance 10\Text Files\). This path is defined in the .dat file.

Substitution path for text files

This is the UNC path to the current text files folder on your file system. You should be able to browse to it.

Retrieve text files via browsing

Select this option if you want to import TXT versions of the image or native files via browsing. If you select this option, you do not have to define the Directory file and Substitution path for text files. Please make sure the TEXT folder is in the same location as the IMAGES and NATIVES folder.

Field name for text content

This field contains the text representation of the native file. Define the field name used in the .dat file for the text content. This field should be defined in both the config file of the Concordance Collector and the default3n.xml file.

Create Zyxmltiff files

Select this option if you want to create multi-page TIFF graphic files *and* recognize them as text using Optical Character Recognition (OCR).

Validate source data before adding

When selected, this option ensures that the Concordance format is checked before validation and that the user is warned if there are any mismatches.

File Types to Collect

The configured file groups are ignored, so the user should not configure any file groups.

Exchange Synchronization Service

Skip Folders

Skip Folders is a new feature that allows you to synchronize specific folders (collect only from folders (and subfolders) specified in SynchronizeOnlyFolders setting) or synchronize everything except data located in folders (and subfolders) listed in ExcludeFromSynchronizationFolders setting.

When both ExcludeFromSynchronizationFolders and SynchronizeOnlyFolders settings are used, we first apply the SynchronizeOnlyFolders list filter, and then the ExcludeFromSynchronizationFolders on previous result.

The FolderStringSeperator setting is used to define how folder paths are separated. This can be any sequence of symbols, like {STRING}.

The following properties are affected: RetentionFoldersList, ExcludeFromSynchronizationFolders, SynchronizeOnlyFolders. Make sure they use the proper values (will be logged on service startup).

Filtered out folders will be marked as Deleted, as well as their items. If a folder is included again, it will be synchronized again.

When a user deleted a folder that is listed to be synchronized, it will be marked as Deleted by a user.

Multiple users can use the same folder name. During synchronization, each folder will be synchronized separately.

Synchronize specific folders

Add the setting `<add key="SynchronizeOnlyFolders" value="<folder_name(s)>" />` to the `\\ZyLAB\EDiscovery\Synchronization\Exchange\ExchangeService\ZyLAB.EDiscovery.Exchange.Standalone.WinService.exe.config` file. Restart the service and synchronize.

Example

In your mailbox, you have a folder tree with 4 levels. You only want to synchronize the third and fourth level. Add the following settings to the config file:

```
<add key="FolderStringSeparator" value=":" />
```

```
<add key="SynchronizeOnlyFolders" value="Top of Information Store/folder_1/folder_2/folder_3" />
```

Add an additional folder:

```
<add key="FolderStringSeparator" value=":" />
<add key="SynchronizeOnlyFolders" value="Top of Information
Store/folder_1/folder_2/folder_3:Top of Information Store/folder_a" />
```

Skip specific folders

Add the setting `<add key="ExcludeFromSynchronizationFolders" value="<folder_name> />` to the `\\ZyLAB\EDiscovery\Synchronization\Exchange\ExchangeService\ZyLAB.EDiscovery.Exchange.Standalone.WinService.exe.config` file. Restart the service and synchronize.

Example

In your mailbox, you have a folder tree with 4 levels. You only want to synchronize the first two folders and skip the third and fourth level. Add the following settings to the config file:

```
<add key="SynchronizeOnlyFolders" value="Top of Information
Store/folder_1" />
<add key="ExcludeFromSynchronizationFolders" value="Top of Information
Store/folder_1/folder_2/folder_3" />
```