



Administration Guide

Eclipse SE 2017.4.0.

Q4 2017

www.iprotech.com
877-324-4776

Notices

Disclaimer

Information in this document, including URLs and other references, is subject to change without notice. Unless otherwise noted, any example companies, organizations, products, domain names, e-mail addresses, logos, people, locations, and events depicted herein are fictitious and no association with any real company, organization, product, domain name, e-mail address, logo, person, location, or event is intended or should be inferred. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in, or introduced into a retrieval system or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Ipro Tech, LLC.

Ipro Tech, LLC may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided in any written license agreement from Ipro Tech, LLC, the furnishing of this document does not give the reader any license to these patents, trademarks, copyrights, or other intellectual property. Every precaution has been taken in the preparation of this document; however, Ipro Tech assumes no responsibility for errors or omissions.

Trademarks

Ipro[®], the Ipro logo, and all of our product names are registered trademarks or trademarks of Ipro Tech, LLC. Please see <http://iprotech.com/trademarks> for details. Adobe is a registered trademark of Adobe Systems Incorporated in the United States and/or other countries. LEADTOOLS is a registered trademark of LEAD Technologies, Inc. Microsoft, Windows, and other Microsoft product names are trademarks of Microsoft Corporation in the United States and other countries. Oracle is a registered trademark of Oracle Corporation. Other products and company names mentioned herein may be trademarks of their respective companies and are used for editorial purposes and to the benefit of the trademark owner with no intention of infringing upon that trademark.

Ipro Eclipse SE utilizes the Oracle[®] Outside In Viewer and TIF6 filter. The software is based in part on the work of the Independent JPEG Group.

Oracle Outside In Viewer © 1991, 2015 Oracle.

Copyright

© 2010-2017 Ipro Tech, LLC. All rights reserved.

Published in the United States of America

Ipro Tech, LLC
1700 N. Desert Drive, Suite 101
Tempe, AZ 85281
USA

1 Introduction

Welcome to Ipro Eclipse SE	1-1
The Eclipse SE Solution	1-2
The Eclipse SE Database	1-2
Eclipse SE Features	1-3
Desktop Simplicity for Document Access	1-3
Language Support	1-3
Document and Data Organization	1-4
Case documents	1-4
Transcripts	1-4
Non-discovery documents	1-4
CaseMap integration	1-4
Searching	1-4
Work Flexibility	1-5
Administrative Benefits	1-5
Case creation and management	1-5
File ingestion and deduplication	1-5
Scanning	1-6
Document reviews	1-6
Print support	1-6
Document relationships and boundaries	1-6
Access and restrictions	1-6
Production	1-7
About this Guide	1-7
Document Assumptions	1-7
Intended Audience	1-7
In This Guide	1-8
Conventions	1-9
Related Documents	1-10
Contacting Ipro Tech Support	1-10
Support Hours	1-10
How To Contact Us	1-10
About Our Support System	1-10
Support Prerequisites	1-11
Error logs	1-11

2 Getting Started

Overview	2-1
Logging in the first time	2-2
Preparation	2-2
Initial administrative log-in	2-2
Continuing Access to Eclipse SE Administration	2-3
Administrative Access to Eclipse SE Desktop	2-3
Typical Workflow	2-3
Eclipse SE Administration Overview	2-5
Administration Sessions	2-5
Meet Eclipse SE Administration	2-5
Working in Eclipse SE Administration	2-8
Configuring System Level Options	2-9
Basic Settings	2-9
Client ID and Serial Number	2-10
Planning for New Implementations	2-11
For Experienced Administrators	2-11
For New Administrators	2-11
Where To Go from Here	2-11

3 Managing Eclipse SE Users and Groups

Overview	3-1
Types of Security	3-1
Configuration Task Order	3-2
Privileges Required	3-2
Before You Begin	3-2
Check license	3-2
Evaluate/change system permissions	3-3
Determine password requirements	3-3
Plan security approach	3-4
Eclipse SE Security Basics	3-4
Users, Groups, and Roles	3-4
Users	3-4
Groups	3-5

Roles	3-5
Privileges	3-7
What are privileges?	3-7
Which privileges can be changed?	3-7
Which “privileges” cannot be changed?	3-7
Default privileges	3-8
Eclipse SE Desktop Viewer privileges	3-8
Eclipse SE Case Administrator privileges	3-11
Active vs. Inactive Users	3-12
Security Beyond User and Group Privileges	3-12
Case-level security	3-12
Review-pass security	3-12
Database field-level security	3-12
Function-specific security	3-13
How Does Eclipse SE Determine Privileges?	3-13
About the security determination flowchart	3-14
What about users with multiple role/privilege settings?	3-16
Creating and Managing Eclipse SE Users	3-19
Before You Begin	3-19
Working in Eclipse SE Administration	3-20
Creating New Users Manually	3-20
Importing/Exporting User Details	3-22
Import/export from/to a text file	3-22
Import/export user details from/to an .XML file	3-24
Import new users from Active Directory	3-25
Displaying Users in the User Management Workspace	3-27
About managing users	3-27
Display users by role or status	3-27
Changing User Details	3-28
Change user role and privileges	3-28
Change user name and/or password	3-29
Change user activity status	3-30
Managing a User’s Case Assignments	3-31
Assign cases to a user	3-31
Assign a case/user role and privileges	3-32
Review a user’s case/user role	3-33
Remove a case/user role and privileges	3-34

Remove case assignments	3-34
Managing a User's Group Assignments	3-35
Assign a user to a group	3-35
Assign a member role and privileges	3-35
Remove member role and privileges	3-37
Remove a user from a group	3-37
Removing Eclipse SE Users	3-38
Creating and Managing Eclipse SE Groups	3-39
Overview	3-39
Privileges required	3-39
Before you begin	3-39
Adding a New Group	3-40
Add a group manually	3-40
Import/export groups from/to an .XML file	3-40
Displaying Groups in the Group Management Workspace	3-41
Adding Group Details	3-41
Add users to groups	3-41
Assign cases to groups	3-42
Define group role and privileges	3-43
Assign case/group privileges	3-44
Assign a member's group role and privileges	3-45
Managing Group Details	3-46
Change group description	3-46
Change group membership	3-46
Change case assignments	3-46
Change a group's role and privileges	3-47
Remove case/group role and privileges	3-47
Remove a user's membership role and privileges	3-48
Removing Groups	3-49
Managing User Sessions	3-50
Working with .XML Files	3-51
Importing New Users and Groups from an .XML File	3-51
Creating the .XML file	3-51
Role attributes	3-54
Privilege attributes	3-55
Roles and privileges examples	3-59
Importing .XML File Contents	3-60

Exporting User and Group Details to an .XML File	3-61
--	------

4 Configuring and Managing Clients

Overview	4-1
Configuration Task Order	4-1
Privileges Required	4-1
Before You Begin	4-2
Adding Clients in Eclipse SE	4-3
Adding New Clients	4-3
Viewing Client Information	4-4
Managing Clients	4-4
Changing Client Details	4-4
Deleting Clients	4-5

5 Creating Cases

Overview	5-2
Configuration Task Order	5-2
Privileges Required	5-2
Before You Begin	5-2
Creating a New Case	5-4
Getting Started	5-4
Step 1: Setting Up a Case	5-4
Step 2: Loading a Case Definition	5-5
About case definition options	5-5
Option 1: Copy from an existing case	5-6
Option 2: Load from a case definition file	5-7
Option 3: Load from a data load file	5-9
Options 4 and 5: Use a template	5-11
Step 3: Defining Database Fields	5-12
About Eclipse SE database fields	5-12
Field details	5-13
Create new fields	5-21
Step 4: Creating a Tag Palette	5-22
About Eclipse SE tags	5-22

Define tags for a new case	5-27
Step 5: Create Redaction Palette	5-29
About Eclipse SE redactions	5-29
Define redactions for a new case	5-30
Step 6: Select Case Options	5-32
Date format examples	5-34
Step 7: Finish Case Creation	5-34
Review and correct required case details	5-34
Creating a Case from an Existing Case	5-36
Migrating Cases from LexisNexis Concordance	5-39
Overview	5-39
What is required?	5-39
What can be migrated?	5-39
Step 1: Setting Up the Migration	5-40
Preparation	5-40
Define basic information	5-40
Step 2: Mapping Fields	5-45
Auto-select fields	5-46
Manually match fields	5-46
Step 2: Select tag, issue, and other options	5-47
Step 3: Finishing the Migration	5-49
Step 4: Verifying the Migration	5-50
Step 5: Viewing Imported Tags	5-51
Step 6: Viewing Imported Redaction Categories	5-51
Migrating Cases from AD Summation	5-52
Overview	5-52
What is required?	5-52
What can be migrated?	5-52
Migrating a Single Case	5-54
Step 1: Set up the migration	5-54
Step 2: Map fields	5-59
Step 2: Select migration options	5-61
Step 3: Finish the migration	5-65
Step 4: Verify the migration	5-66
Step 5: View imported tags	5-67
Step 6: View imported redaction categories	5-67

Migrating Multiple Cases (Batch Migration)	5-68
Next Steps	5-70
6 Managing Eclipse SE Cases	
Overview	6-1
Privileges Required	6-1
For New Administrators	6-2
Impact of Changes	6-2
Getting Started with Changes	6-3
Basic Case Changes and Actions	6-4
Changing Case Details	6-4
Making a Case Inactive or Active	6-6
Exporting a Case Definition File	6-6
About case definitions	6-6
Export procedure	6-7
Exporting Desktop Layouts	6-7
Deleting a Case	6-8
Managing Database Fields	6-9
Overview	6-9
Field change limitations	6-9
Changing Field Definitions	6-9
Changing Field-level Security	6-11
Before you begin	6-11
Set field-level security	6-12
Managing Assigned Groups and Users	6-13
Adding or Removing Groups	6-13
Changing Case/Group Role or Privileges	6-13
Clearing Case/Group Role or Privileges	6-14
Setting or Clearing Member Role or Privileges	6-14
Adding or Removing Users	6-14
Changing Case/user Role or Privileges	6-15
Setting a case/user role or privileges	6-15
Clear a case/user role or privileges	6-15
Review a user's role or privileges	6-16

Changing the Tag Palette	6-17
Changing the Redaction Palette	6-19
Configuring Ipro Production Shield	6-21
About Production Shield	6-21
Production Shield Configuration	6-21
Changing or Removing Production Shield	6-22
Working with Stop Words	6-23
About Stop Words	6-23
Changing Stop Words	6-23
Restore Default Stop Words	6-25
Copy Stop Words	6-25
Reviewing/Changing Database Records	6-26
Configuring Key Words	6-27
Defining Key Words	6-27
Modifying Key Word Groups	6-29
Deleting Key Word Groups	6-29
Managing Coding Forms	6-30
Overview	6-30
About coding forms	6-30
Planning	6-31
Creating New Coding Forms	6-31
Define coding form rules	6-35
Modifying Coding Forms	6-37
Managing Multi-Field Sort Indexes	6-38
Creating Multi-Field Sort Indexes	6-38
Modifying Multi-Field Sort Indexes	6-39
Other Case Management Activities	6-40
Using Eclipse SE Reports	6-40
Using Transcripts	6-40
Working with Case Tools	6-40

7 Working with Case Tools

Overview	7-2
-----------------------	------------

About Case Tools	7-2
Case Utilities	7-2
Index maintenance	7-2
Database repair	7-2
Backup/restore	7-2
Bulk tagging	7-3
Global Activities	7-3
Search and replace	7-3
Spell check	7-3
Data normalization	7-4
Path Management	7-4
Image and native file paths	7-4
Volumes	7-4
Scheduling	7-4
Privileges required	7-4
Index Maintenance	7-5
Rebuilding Indexes	7-5
Flushing an Index	7-6
Repairing Case Databases	7-7
Backing Up/Archiving and Restoring Case Data	7-8
Overview	7-8
Backing Up Case Data	7-8
Restoring a Backup	7-9
Removing a Backup	7-10
Tagging Multiple Documents (Bulk Tagging)	7-11
Globally Search and Replace Field Data	7-13
About Global Replace	7-13
Performing Global Replace	7-13
Globally Check Spelling	7-17
Normalizing Data	7-22
Managing Files Paths and System Fields	7-26
About Path and Field Management	7-26
Validating Paths and Fields	7-27
Managing Volumes	7-28
About volumes	7-28

Create a new volume	7-29
Change path for existing volumes	7-29
Delete a volume	7-30
Updating File Paths	7-31
Search/replace examples	7-33

8 Importing and Exporting Case Data and Files

Overview	8-1
File Details	8-2
Case data files	8-2
Case definition files	8-3
Ipro Product Integration	8-4
Ipro eScan-IT	8-4
Ipro Eclipse	8-4
Ipro Classic Suite Integration	8-4
Configuration Task Order	8-4
Importing case data and/or files	8-4
Exporting case data	8-4
Privileges Required	8-5
Load File Considerations	8-5
Load file size	8-5
Record size limitations	8-5
Image key considerations	8-5
Path information	8-5
Importing Case Data	8-6
Before You Begin	8-6
Selecting the Data Source	8-7
Delimiter details	8-11
Matching Database Fields	8-12
Overview	8-12
Map fields using auto-selection	8-13
Map fields manually	8-14
Map fields using a field template	8-15
Map image data and OCR text files	8-16
Selecting Mapping Options	8-17
Check/correct path information	8-17

Select import mode for data	8-18
Select image file options	8-23
Select text options	8-25
Correct native file paths	8-26
Select indexing method	8-27
Load File Validation	8-28
Manage undefined tags	8-28
Manage undefined redactions	8-29
Review undefined control list values	8-30
Evaluate load file errors	8-31
Completing the Import	8-31
Importing Summation annotations	8-33
Importing OCR Files	8-36
Overview	8-36
Import Procedure	8-36
Importing Production History	8-38
Overview	8-38
Import Procedure	8-38
Importing Ipro Classic Suite Projects	8-40
Overview	8-40
Import Procedure	8-40
Exporting Case Data	8-42
About Exported Data	8-42
Before You Begin	8-42
Getting Started with Exports	8-42
Step 1: Select Case	8-44
Select Entire Case	8-44
Select by Image Key Range	8-44
Select by Advanced Search	8-44
Select by Production Set	8-44
Step 2: Select Output	8-45
Select Fields	8-48
Step 3: Finish	8-49
Exporting a Case Definition File	8-50
Publishing a Case	8-50

Overview	8-50
About publishing	8-50
Limitations	8-50
Preparation	8-51
Publishing an Eclipse SE Case	8-52
Publishing a .DLF File	8-55
Publishing a Load File	8-57
Publish an Ipro Classic Suite Case	8-63
Distributing a Case	8-69

9 Processing Image, Native, and OCR Files

Overview	9-1
Adding Files without a Load File	9-1
Replacing Missing Image or OCR Files	9-2
Privileges and Conditions Required	9-2
Scheduling	9-3
Ingesting Image Files	9-3
Overview	9-3
Preparation	9-3
Ingestion Procedure	9-4
Ingesting Native Files	9-9
Overview	9-9
About native ingestion	9-9
Streaming ingestion	9-9
Deduplication	9-9
Basic ingestion process	9-10
Preparation	9-11
Ingestion Procedure	9-12
Creating Multiple Document Images (Bulk TIFF)	9-22
Creating OCR for Multiple Documents (Bulk OCR)	9-24
.....	9-27

10 Importing and Managing Transcripts

Overview	10-1
About Transcripts	10-1
Privileges Required	10-2
Transcripts in the Desktop	10-2
Before you Begin	10-2
.TXT file requirements	10-3
.XML file requirements	10-5
Importing Transcript Files	10-5
Exporting Transcript Files	10-7
Managing Transcripts	10-8
Getting Started	10-8
Eclipse SE Administration	10-8
Eclipse SE Desktop	10-8
Modifying Transcript Details	10-9
Working with Transcript Types	10-9
About transcript types	10-9
Create new transcript types	10-10
Assign transcripts to a type or subtype	10-11
Edit transcript type name	10-11
Delete transcript type	10-12
Perform multiple transcript-type actions	10-12
Working with Transcript Issues	10-13
About transcript issues	10-13
Create new issues	10-13
Modify an issue definition	10-14
Delete an issue	10-15
Managing Exhibit Paths	10-15
Checking Transcript Properties	10-17
Deleting Transcripts	10-17

11 Evaluating Case Records in Eclipse SE Administration

Overview	11-1
-----------------------	-------------

Getting Started	11-2
Evaluating and Changing Records	11-3
Reviewing the Documents List	11-3
Reviewing Document Details	11-3
Checking the Image File Path	11-5
Reviewing Import Job History	11-6
Deleting Pages or Documents	11-7
12 Managing the Review Process	
Overview	12-2
About Review Passes and Batches	12-2
Review Pass Basics	12-2
How Documents are Grouped	12-2
How Reviewers are Assigned	12-3
Configuration Task Order	12-3
Privileges Required	12-3
Before You Begin	12-3
Creating a Review Pass and Batches	12-4
Defining Basic Details	12-4
Setting Fields for the Review Pass	12-6
Assigning Reviewers	12-6
Assign groups	12-7
Assign individual users	12-7
Set role/privileges at the review pass level	12-8
Assigning Review Pass Tag Palette	12-9
Creating Batches	12-10
Managing Review Passes	12-12
Changing Basic Review Pass Details	12-12
Changing Review Pass Fields	12-13
Changing Reviewer Assignments	12-14
Changing the Review Pass Tag Palette	12-14
Deleting a Review Pass	12-15
Managing Batches	12-16
Overview	12-16

Manage Batches tab details	12-16
Getting started	12-17
Merging and Splitting Batches	12-18
Merge batches	12-18
Split Batches	12-19
Assigning Reviewers	12-20
Assign batches to reviewers automatically	12-20
Assign a reviewer to an individual batch	12-22
Remove a reviewer from a batch	12-22
Setting Batch Priority	12-23
About batch priorities	12-23
Procedure	12-23
Setting Batch Status	12-24
About statuses	12-24
Procedure	12-24
Deleting Batches	12-25
Copying the Batch List	12-26

13 Working with Case Folders and Files

Overview	13-1
Working with Case Folders	13-2
Folders Containing Files	13-2
Folders maintained by administrators	13-2
Folders maintained by reviewers	13-3
Folders Containing Records	13-3
Transcripts Folder	13-3
Working with Case Instructions, Alerts, and Documents	13-4
Adding Documents	13-4
Changing case instructions, alerts, or documents	13-5
Deleting instructions, alerts, or documents from a case	13-6

14 Configuring and Managing Print Servers

Overview	14-1
-----------------------	-------------

About the Print Manager	14-1
Privileges Required	14-1
Before You Begin	14-2
Configuring Eclipse SE Printer Servers	14-2
Managing Print Activities	14-4
Change Print Manager Display	14-4
Change Existing Print Server Configuration	14-4
Activate Auto-polling	14-5
Manage Print Jobs	14-6
Create a History Report	14-6
.....	14-6
15 Working with Reports	
Overview	15-1
Available Reports	15-2
Reports menu reports	15-2
Case management reports	15-4
Deduplication reports	15-4
Privileges Required	15-4
Before You Begin	15-4
Using Primary Reports	15-5
Affidavit/Responsive Report	15-5
Case Data Summary Report	15-9
Case Review Summary Report	15-11
View the report	15-12
Print the report	15-14
Save the report	15-14
Find report content	15-14
Case Review Summary by Category	15-15
View the report	15-15
Print the report	15-16
Inactive Case Report	15-17
Privilege Report	15-18
Production Summary Report	15-20
Production Deliverables Report	15-21

Redacted Documents Report	15-24
Redacted Detail Report	15-25
Reviewer Detail Report	15-26
Overview	15-26
Generate the report	15-26
View/Export the Report	15-28
Shortcut Keys Report	15-31
Using Case Management Reports	15-32
About Case Management Reports	15-32
Generating Case Management Reports	15-34

16 Producing Documents

Overview	16-1
About Document Production	16-1
Privileges Required	16-2
Before You Begin	16-2
Basic preparation	16-2
Production process introduction	16-3
Creating a New Production Job	16-4
Getting Started with Production	16-4
Selecting the Production Set	16-4
Select documents by searching	16-5
Select a range of documents	16-6
Addressing Production Shield Issues	16-8
Selecting Output Options	16-10
Define output type and output folders	16-10
Define file names	16-13
Select OCR and native file options	16-15
Define output options	16-19
Select metadata for load files	16-22
Selecting Image Options	16-25
Define image settings	16-25
Define page attributes	16-27
Selecting Endorsement Options	16-30
Annotation options	16-31

Image keys	16-33
Tag options	16-37
Data fields	16-39
Custom messages	16-41
Change endorsement settings	16-42
Selecting Print Options	16-44
Reviewing Production Settings	16-47
Completing Production	16-48
Using a Production Template	16-52
Working with Saved Production Settings	16-53
Overview	16-53
Creating a Production Job from Saved Settings	16-53
Deleting Saved Production Settings	16-54

A Ipro Eclipse SE .DLF Specification

Introduction	A-2
About .DLF Files	A-2
Basics	A-2
.DLF Code Summary	A-3
Code and Syntax Details	A-5
Loading Document Fielded Data	A-5
Format	A-5
Examples	A-5
Dates in Field Data	A-5
Format	A-5
Examples	A-5
Loading Document-Level OCR	A-6
FTXT format	A-6
FTXT example	A-6
DBFD/DBRC format	A-6
DBFD/DBRC examples	A-6
Loading Document Tags	A-7
Format	A-7
Examples	A-7
Removing Document Tags	A-7

Format	A-7
Example	A-7
Specifying Volume(s)	A-8
Format	A-8
Example	A-8
Loading Pages/Images	A-8
Format	A-8
Example 1: Volume specification	A-9
Example 2: Hardcoded image path	A-9
Example 3: Multi-page image file	A-9
Example 4: Image rotation	A-9
Example 5: Document consolidation	A-9
Loading Page Tags	A-10
Format	A-10
Example	A-10
Removing Page Tags	A-10
Format	A-10
Example	A-10
Loading Page-Level OCR	A-11
FOCR format	A-11
FOCR example	A-11
OCRT format	A-11
OCRT example	A-11
Loading Word Coordinates for Page OCR/Extracted Text	A-12
Formats	A-12
Example	A-12
Loading Redactions	A-13
Format	A-13
Example 1: Redaction specification	A-13
Example 2: Redaction specification for rotated image	A-13
Example 3: Redaction specification for default redaction category	A-14
Loading Annotations	A-14
Format	A-14
Example 1: Highlight annotation	A-15
Example 2: Sticky flag annotation	A-15
Example 3: Embedded text annotation	A-16
Example 4: Markup annotation	A-16
Loading Transcripts	A-16

Format	A-16
Loading Transcript Issues	A-16
Format	A-16
Loading Transcript Types	A-17
Format	A-17
Loading Production Jobs	A-17
Format	A-17
Loading Production History Items	A-17
Format	A-17
.DLF Sample	A-18

B LFP Commands Supported by Ipro Eclipse SE

Introduction	B-1
Overview	B-1
Supported Commands Summary	B-2
Command Details	B-2
Annotations (AN)	B-3
Full-text Search Highlights (FT)	B-3
Importing a New Page (IM)	B-4
Applying a Tag to an Image (IS)	B-7
Defining Original File for EDD Image (OF)	B-7
Including OCR Text in the .LFP File (OI)	B-9
Original Text (OT)	B-10
Changing the Location of a Volume (VN)	B-11

C Eclipse SE EDRM Specification

Introduction	C-1
XML Structure	C-2
Documents	C-3
Field Data	C-3
Image Keys	C-3
Review Data	C-4

Document Tags	C-4
Page Tags	C-4
Redactions	C-4
Annotations	C-5
Image Files	C-5
OCR	C-5
OCR Word Coordinates	C-6
Volume	C-6
Sample EDRM	C-7

D Adding Images to a Native-Only Case

Introduction	D-1
Preparation	D-1
Procedure	D-2

Contents

1 Introduction

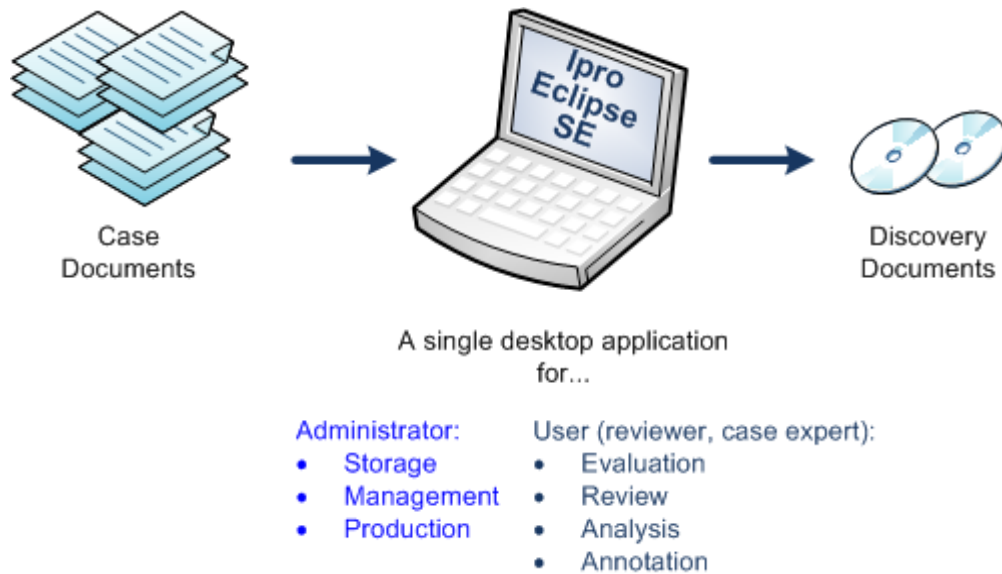
In this Chapter

Welcome to Ipro Eclipse SE	1-1
The Eclipse SE Solution	1-2
The Eclipse SE Database.....	1-2
Eclipse SE Features	1-3
Desktop Simplicity for Document Access.....	1-3
Language Support	1-3
Document and Data Organization	1-4
Searching	1-4
Work Flexibility	1-5
Administrative Benefits.....	1-5
About this Guide	1-7
Document Assumptions	1-7
Intended Audience.....	1-7
In This Guide	1-8
Conventions.....	1-9
Related Documents.....	1-10
Contacting Ipro Tech Support	1-10
Support Hours.....	1-10
How To Contact Us	1-10
About Our Support System	1-10
Support Prerequisites.....	1-11

Welcome to Ipro Eclipse SE

More than just a litigation database, Ipro[®] Eclipse SE[™] gives your organization the power to effectively control all aspects of its cases with a single discovery management application. It allows you to focus on the case, not the technology.

Reviewers, legal experts, and other users will review, analyze, and annotate documents with the easy-to-use tools of the Eclipse SE Desktop. Administrators will manage security, case content, production, and all aspects of the process with Eclipse SE Administration. The following figure presents an overview of the Eclipse SE role within the discovery process.



Ipro Eclipse SE - The Big Picture

The Eclipse SE Solution

Ipro Tech offers a discovery management system that:

- Easily consolidates all documents and data into a unified view of the case.
- Includes functionality for comprehensive case review and analysis.
- Provides extensive administrative configuration options and capabilities.
- Manages your multi-language (Unicode) documents, electronic and scanned documents, and large databases.

The Eclipse SE Database

Eclipse SE uses the Ipro Database. The Ipro Database is included with the license.

The Ipro Database:

- Consolidates data that is shared by all the application components.
- Simplifies data management tasks and reduces job turnaround time.
- Reduces your organization's need for expensive technical staff to manage multiple technologies, which reduces the cost of ownership.

Eclipse SE Features

Desktop Simplicity for Document Access

Case data is accessed through the Eclipse SE Desktop. Based on the privileges managed by the Super or Case Administrator, users can easily:

- View a variety of image files¹, native, and OCR files, as well as record content, concurrently from a single interface.
- Add document- and/or page-level tags.
- Use custom tag rules and custom tag palettes (set up by the Eclipse SE administrator).
- Use an advanced search to easily find case data. (See "[Searching](#)" on page 1-4.)
- Add redactions, markups, and highlights.
- Add text notes and "sticky" notes.
- Edit field data using convenient editing tools, including spellcheck.
- Easily compare the field data of two records.
- Use keyboard shortcuts for efficient tagging, field editing, and document navigation.
- Work with case folders (Smart Folders, Private Folders, Journal, and search folders) to manage case details or find and organize specific documents.
- Create TIFF images "on the fly."

Language Support

Eclipse SE offers full Unicode-compliant multi-language support.



IMPORTANT! Eclipse SE uses the font "Arial Unicode MS" for proper display of Unicode characters. If you are working in a Unicode language such as Chinese, Japanese, Korean, or similar languages, ensure that this font is installed.

Arial Unicode MS is supplied with a variety of Microsoft® products. It can also be purchased. See Microsoft's Web site for details, [Arial Unicode MS - Version 1.01](#).

1. Image files may be TIFF, BMP, JPG, PCX, PDF, or PNG files.

Document and Data Organization

Case documents

Eclipse SE provides several ways for administrators and users to organize documents, including:

- Set up “Smart Folders” to organize documents by tags or categories.
- Drag and drop documents into Private Folders for easy reference or future evaluation.
- Create personal Journals for case notes.

Transcripts

In addition to case documents, transcripts can be imported into Eclipse SE. In Eclipse SE Desktop, transcripts can be reviewed, searched, highlighted, annotated, and linked to specific case documents.

Non-discovery documents

Eclipse SE provides easy access to documents pertinent to a case that are not discovery documents. For example, exhibits, legal pleadings, interrogatories, or complaint filings.

CaseMap integration

For users of LexisNexis® CaseMap® (version 10 or later), Eclipse SE allows you to add Eclipse SE documents directly from the Eclipse SE Desktop to your CaseMap case. Documents in Eclipse SE can be sent to CaseMap as links, images, or native files.

Searching

Eclipse SE includes a powerful search capability. Search technology includes a custom-built Ipro search engine for the Ipro Database. In Eclipse SE administrators and users can:

- Quickly find needed documents using the Eclipse SE search function with criteria that exist in the database, such as by content in a specific field, or a specific tag or redaction category.
- Users who prefer typing to selecting options in a dialog box can easily enter search expressions in the main Search bar. Or, the Advanced Search is an easy-to-use graphic interface for constructing complex search expressions.
- Search transcripts or non-discovery documents that are part of your case.
- Create folders for organizing saved searches.

Work Flexibility

Users who need to be away from the office can work offline:

- Eclipse SE Desktop:
 - Replicate - create a local, standalone instance of Eclipse SE Desktop data and files. This can be helpful if you need to review case documents when no network access exists (such as when traveling).
 - Export - create a .CSV or .DLF load file containing case field data and optionally tags, annotations, and other case details.
- Eclipse SE Administration:
 - Publish - create a standalone version of all or part of an Eclipse SE case, an Ipro Eclipse case, or data from another review program, for reviewers outside of your Eclipse SE environment.

Administrative Benefits

Case creation and management

A straightforward interface steps administrators through the following tasks:

- Creating new cases, including database fields, tags, redactions, and stop words.
- Migrating cases from LexisNexis[®] Concordance[®] or AccessData[®] Summa-
tion[®].
- Importing case data, images, OCR, and native files.
- Adding other case-related documents, including instructions, alerts, non-
discovery documents, and transcripts.
- Checking spelling, data consistency, and file paths using case-wide
("global") functions.
- Performing other configuration tasks, such as defining specific transcript
issues.

File ingestion and deduplication

Easily add image and/or native files to a case without a load file. The optional Eclipse SE Streaming module provides faster ingestion times, deduplication, and other features.

Scanning

Add missing images or replace damaged images with the optional Eclipse SE Desktop Scanning module. Simple commands and interface step you through scanning and quality checks.

Document reviews

With Eclipse SE a thorough and efficient review process is possible. Administrators can:

- Distribute documents for review to individual reviewers or to groups of reviewers.
- Configure coding forms to help ensure efficient review cycles.
- Manage workflow through the use of multiple review passes and real-time analytics.
- Monitor the progress of cases and establish real-time alerts.

Print support

For sites with large printing needs, Eclipse SE offers the optional Eclipse SE Print Manager (a separately purchased component). When this component is installed, administrators can configure central print management to free up the resources of individual users' computers.

Document relationships and boundaries

Eclipse SE allows extensive document information for users. Administrators can define the level of detail to be included in a case, so that users can:

- View document boundaries.
- View document family relationships.

Access and restrictions

Eclipse SE provides significant security. Administrators can:

- Restrict viewing and updating of data at the field level.
- Limit access based on user roles, groups, and case privileges.
- Use Windows[®] Active Directory[®] to manage user access.

Production

Eclipse SE administrators can efficiently:

- Produce endorsed documents.
- Create TIFF, native, and PDF formats of production documents.
- Create page-level OCR.
- Print productions locally or remotely.

About this Guide

Document Assumptions

This guide assumes that Eclipse SE products have been properly installed and configured as explained in the *Eclipse SE Installation or Upgrade Guide* (see "[Related Documents](#)" on page 1-10).



NOTE: For procedures in this guide, it is also assumed that you are logged into Eclipse SE Administration and that you have the needed role and/or privileges. [Chapter 3](#) explains roles and privileges.

Intended Audience

This document is intended for the employees who will administer Eclipse SE within an organization. As an Eclipse SE administrator, you are responsible for all aspects of user and case management, reviews, and production.

Eclipse SE allows more than one individual to be assigned administrative duties, so tasks can be shared.

Administrators are expected to have basic knowledge and understanding of:

- The legal industry and discovery process.
- Your organization and how Eclipse SE will be used within it.
- Windows administrative functions: areas such as networks, client-server issues, and Windows Active Directory, as they pertain to your organization.

An Eclipse SE administrator serves users such as case reviewers and experts (for example, legal counsel), who will use the Eclipse SE Desktop to access, review, and analyze case data.

In This Guide

In addition to this introduction, the following chapters contain the information needed to administer all aspects of Eclipse SE:

Chapter	Description
2: Getting Started	Offers an overview of Eclipse SE Administration and associated activities.
3: Managing Eclipse SE Users and Groups	Explains security and the procedures that ensure only authorized individuals access case data and perform appropriate tasks.
4: Configuring and Managing Clients	Covers the configuration of client information in Eclipse SE.
5: Creating Cases	Provides details on setting up new cases in Eclipse SE, including such activities as defining database fields, tags, the redaction palette, and other options for each case. Also covers migration of cases from LexisNexis Concordance or AD Summation.
6: Managing Eclipse SE Cases	Provides details on managing cases in Eclipse SE.
7: Working with Case Tools	Covers Eclipse SE administrative tools that help you maintain the integrity of your case databases and efficiently perform various administrative tasks
8: Importing and Exporting Case Data and Files	Explains the many options Eclipse SE offers for importing data and documents as well as how to export and/or publish case data.
9: Processing Image, Native, and OCR Files	Provides details on ingesting image and native files into a case, deduplication, and bulk processing for TIFF and OCR files.
10: Importing and Managing Transcripts	Explains the use of transcripts within Eclipse SE Desktop and how to import them into your Eclipse SE system.

Chapter	Description
11: Evaluating Case Records in Eclipse SE Administration	Provides information on reviewing case records as part of case import, case migration, or case modification activities.
12: Managing the Review Process	Covers the setup of review passes and batches as well as the monitoring capabilities in Eclipse SE.
13: Working with Case Folders and Files	Explains how to include instructions and alerts for reviewers.
14: Configuring and Managing Print Servers	Explains how to configure central print management to free up individual users' computer resources.
15: Working with Reports	Introduces the reports available and explains how to use the report feature of Eclipse SE Administration.
16: Producing Documents	Explains how to produce case documents for discovery or other purposes. A variety of outputs can be produced, including TIFF, PDF, native files, page OCR, and print.
Appendices	<p>A: Explains the .DLF load file a new format for the legal industry that is created when you export a case in Eclipse SE Administration.</p> <p>B: Covers .LFP commands supported by Eclipse SE.</p> <p>C: Includes the specification for Eclipse SE .XML (EDRM-compliant) load files.</p> <p>D: Explains how to add images to a case comprised of only native files.</p>

Conventions

The following symbols alert you to important information.



Indicates useful information that supplements or emphasizes important points in the surrounding text.



Identifies important information that should be read to ensure the correct use of Eclipse SE.

Related Documents

Ipro Eclipse SE documentation is available in the [MyIpro](#) Resource Center. MyIpro is a website for Ipro clients, where product software, documentation, training videos, and other materials can be obtained. Note: If you do not yet have a MyIpro account, please contact Ipro Tech Support as explained on page [1-10](#).

Additional information can be obtained by visiting www.iprotech.com.

Contacting Ipro Tech Support

Support Hours

- General Support Hours: Monday - Friday, 5 a.m. - 7 p.m. (GMT-07:00) Arizona
- After Hours: 24 x 7 for urgent issues

How To Contact Us

- Phone: 877-324-4776
- Web: "Submit a Ticket" under "Resources" at <http://iprotech.com>
- Email: support@iprotech.com

About Our Support System

All issues entered by phone, email, and web will generate a new support ticket and an auto-response will be sent to the sender with the new issue number. Reply to this email for all future email correspondence on that issue to prevent a duplicate ticket from being generated.



Web Users: You will need to register the first time you visit our website. After that, you can simply log in with your user name and password.

By default, you will be able to view, edit, and report on all issues entered under your contact ID (email address). Our support platform also allows contacts from your organization to be listed as "Support Administrators," giving them the ability to view all issues entered by anyone inside the organization. If this is something you wish to be granted, please have your management contact Ipro Support at support@iprotech.com with "Support Admin Request" in the subject line and the names and email addresses of those to be given access in the email message.

Support Prerequisites

Please have the following information available before contacting/emailing Support:

- Ipro Tech software name and version number (for example, "Eclipse SE 2017.4.0 Pre-release")
- Operating system running the Ipro software and service pack number (for example, Windows 7 SP1)
- Description of problem, screen shot and complete transcript of error received if applicable
- Summary of steps that produced the problem/error
- Email a ZIP file containing any relevant screen shots, error messages or files (for example, log files)
- If you email Support, please include the following in the email subject line:
- Product name version/company - Nature of request (for example, Eclipse SE 2017.4.0/ABC Co. - Install/database issue)

Error logs

An error may generate an error log file. You may be asked to send an error log file to your Ipro Support specialist. The location of these files includes:

- Administrative errors: Error log files are located in the system directory in a sub-directory called "errorlogs."
- Client errors: Error log files are located on the client's computer as follows: C:\Users*username*\AppData\Local\Temp (where *username* is your log-on name).
- Load file errors (Eclipse SE Administration only): If errors occur during import, an error log is placed in the folder containing the load file.

2 Getting Started

In this Chapter

Overview	2-1
Logging in the first time	2-2
Continuing Access to Eclipse SE Administration	2-3
Administrative Access to Eclipse SE Desktop	2-3
Typical Workflow	2-3
Eclipse SE Administration Overview	2-5
Administration Sessions.....	2-5
Meet Eclipse SE Administration	2-5
Working in Eclipse SE Administration.....	2-8
Configuring System Level Options	2-9
Basic Settings	2-9
Client ID and Serial Number.....	2-10
Planning for New Implementations	2-11
For Experienced Administrators	2-11
For New Administrators	2-11
Where To Go from Here.....	2-11

Overview

Eclipse SE Administration enables you to perform a variety of configuration duties that are explained in this guide. This chapter introduces typical administrative activities and also provides an overview of the Eclipse SE Administration interface.

Logging in the first time

Preparation

During initial product installation, an initial Super Administrator is defined—a user with the Super Administration role who is the first authorized user defined in the Eclipse SE Server. This administrator will log in to Eclipse SE Administration and typically configure one or more administrators who will continue day-to-day management of Eclipse SE.

To log in to Eclipse SE Administration the first time, make sure that:

- You have the Super Administrator’s user ID and password defined during installation.
- You know the network location of the Eclipse SE administrative system directory.

Initial administrative log-in

If not done during product installation, define the Eclipse SE system directory as follows:

1. From the Windows desktop, choose **Start > All Programs > Ipro Tech > Eclipse SE > Administration**.
2. Specify a system directory:
 - a. In the Ipro Admin Login dialog box, click **Configure**.
 - b. Navigate to or enter the path for the Eclipse SE system directory, then click **OK**.
3. Enter the Super Administrator’s user name and password and click **OK**. Eclipse SE Administration opens.

Continuing Access to Eclipse SE Administration

After you have logged in the first time, you will log in to Eclipse SE Administration with your administrative user ID and password. Note:

- The system directory defined when you first log in is retained for all sessions. If you have multiple system directories (defined during installation), you will need to select the needed directory each time you log in.
- If you will have an administrative team, you will need to add each person as a user as explained in [Chapter 3](#).
- You will need to communicate the system directory information to all Eclipse SE administrators and users.

Administrative Access to Eclipse SE Desktop

Super administrators can open all cases in Eclipse SE Desktop, and can also open (and will be assigned) unassigned batches in any case. Super administrators can perform all tasks in cases or batches.

Typical Workflow

Although Eclipse SE offers quite a bit of flexibility as to the order of configuration activities, a typical workflow that will work for many installations is shown in the following figure. You may want to follow this workflow for a limited project (such as a single case and a few reviewers), or you may want to set up several cases, before you deploy Eclipse SE for reviewers and other users.



Typical Eclipse SE Administrative Workflow²

-
2. If you have purchased the Eclipse SE Print Manager, you will also need to configure print servers before users begin working in Eclipse SE.

Eclipse SE Administration Overview

Administration Sessions

Once you start Eclipse SE Administration, the working session typically remains active as long as you work in the application.



The administration session can be lost for various reasons. If this occurs, a message in the Administration status bar will alert you to the situation. As needed, quit (**Exit Case Database** on the Eclipse SE button menu), then restart Eclipse SE Administration.

Meet Eclipse SE Administration


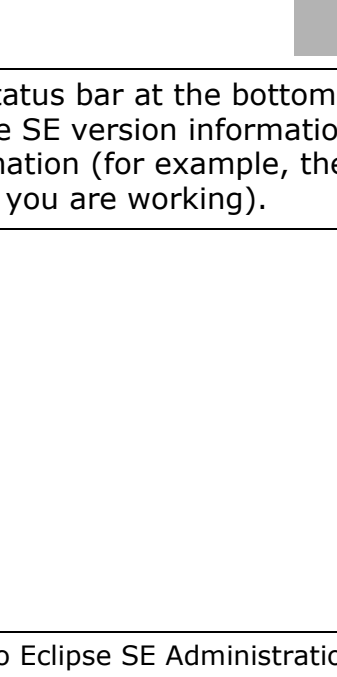
The Eclipse SE Administration workspace includes components that allow you to efficiently manage Eclipse SE. The following figure shows the Administration workspace and its major components; see the table on the following pages for a description of each component.



Eclipse SE Administration Workspace Components





Component		Description
A	Eclipse SE Button	 <p>The Eclipse SE button in the upper left corner of Eclipse SE Administration includes the following commands. Simply click the Eclipse SE button to access the commands.</p> <ul style="list-style-type: none"> • Login: Log in to Eclipse Administration. • Logout: Log out the current administrative user. • Color Scheme: Choose from one of three standard Microsoft Office color schemes - blue, silver, or black, or create your own custom color scheme. • Help: Check current product release details and/or access documentation and other resources available at MyIpro. (See also "Related Documents" on page 1-10.) • Exit - To quit Eclipse SE Administration, click Exit Case Database.
B	Main tabs	<p>The Case Management, Production, and System Management main tabs in Eclipse SE Administration allow you to quickly find the menus and items needed to complete a task. Commands are organized in menus on each tab.</p> 
C	Administration workspace	<p>The Eclipse SE Administration workspace is the main working area of Eclipse SE Administration. Based on the work task you choose, the workspace will include a main workspace (such as the Create Case workspace shown on page 2-5.)</p> <p>Some workspaces (and tabs) include tabular data as described in "Working in Eclipse SE Administration" on page 2-8.</p>

Eclipse SE Administration Workspace Components (Continued)

Component		Description
D	Workspace tabs	<p>For more complex work tasks, tabs are included in the workspace. Note that:</p> <ul style="list-style-type: none"> • For sequential tabs (such as those for creating a case), your entries on each tab remain in effect until the complete work task is completed. If you close Eclipse SE Administration before completing a particular task, your entries on individual tabs will be lost. • Click the  buttons (on the right of the tabs) to access tabs that are not visible.
E	Navigation panel	<p>The navigation panel is subdivided into one or more menus, submenus, and work tasks corresponding to main tab functions.</p> <p>The adjacent figure shows a portion of the navigation panel for the Production tab.</p> 
F	Status bar	<p>The status bar at the bottom of the workspace includes Eclipse SE version information and optionally, other status information (for example, the location of the database on which you are working).</p>

Working in Eclipse SE Administration

While working in Eclipse SE Administration, you can perform the following actions in most workspaces:

- Maximize the Eclipse SE Administration window by clicking the Maximize button in the window's upper right corner.
- Drag a window border to increase the height, width, or overall size. To do so, place the mouse pointer over a window boundary until it changes to , , or , respectively, and drag to the desired size.
- Click the Forward or Backward button, , to see all tabs in a particular workspace.
- For tabs containing tables, sort a table by a particular column by clicking on the column heading.
- Some tabs containing a table allow you to change the order of columns in the table. When this is possible, drag a column heading to the desired location in the table.

For example, in the **Create Case > Step 3. Define Database Fields** tab, drag the **Edit** column to the left side of the table for easier access as shown in this figure:



Configuring System Level Options

Basic Settings

Before you begin other Eclipse SE administrative activities, you can configure the following system settings. These settings can also be changed later if needed.

Options	Description
Strong Passwords	Eclipse SE allows you to require strong passwords, which must be from 8 to 16 characters long and include at least one uppercase character and one number or special character. If strong passwords are not required, then a password that is 6 - 16 characters long is required.
Session Timeout	By default, Eclipse SE Desktop sessions will time out if no user activity occurs for 30 minutes. Longer timeout periods can be set, up to 24 hours.
Active Directories	In large organizations with an administrative team and network in place, users can quickly be added in Eclipse SE, consistent with network information.
Optional Database Directory	Each case requires a folder in which Eclipse SE places database-specific files and other files required for the case. By default (if no folder is specified during case creation, the folder will be created in the Eclipse SE system directory (identified when you log in the first time). This option allows you to define a default location other than the system directory, and optionally make the location unchangeable when new cases are created. (Changes here will not affect existing cases.)

After reading setting details in the previous table, configure basic system settings as follows:

1. Log in to Eclipse SE Administration as a Super Administrator.
2. Click the **System Management** tab and then **Configure System Level Options**. Complete the following steps as needed.
3. To require strong passwords, select the **Force Strong Passwords** option.

4. To change the timeout setting, select the preferred time from the **Session Timeout** list.
5. To configure Active Directory domains:
 - a. Click **Add**.
 - b. In the Enter Active Directory Domain dialog box, enter the domain name and click **OK**.
 - c. Note that domains can be changed or deleted if needed.
6. To define a default location for case data directories:
 - a. Enter the preferred location in the **Optional Database Directory** field. The location must be a mapped drive or UNC path.
Important! This directory must be in a network location that is accessible by all Eclipse SE users.
 - b. To make the location unchangeable, select the **Do NOT allow override during Case Creation** option.
7. When settings are complete, click **Save**.
8. In response to the confirmation message, click **OK**.

Client ID and Serial Number

On rare occasions, the client identification (ID) and/or product serial number may need to be changed manually. If this action is needed, complete the following steps.



CAUTION! To ensure proper operation of Eclipse SE, change these numbers *only* if directed to do so by Ipro Tech Support.

1. Log in to Eclipse SE Administration as a Super Administrator.
2. Click the **System Management** tab and then **Configure System Level Options**.
3. Make changes in the **Client ID** and/or **Serial Number** fields as directed by Ipro Tech Support.
4. When settings are complete, click **Save**.
5. In response to the resulting message, click **OK**.

Planning for New Implementations

For Experienced Administrators

Those administrators who are experienced in the processing of litigation documentation, those who have good standards and processes in place, will find an easy transition to Eclipse SE.

After reviewing this chapter, log in to Eclipse SE Administration, take a “tour,” and then begin your administrative tasks. Refer to this document for procedure details.

For New Administrators

Those who are new to litigation support software will also find Eclipse SE Administration easy to use.

As with many endeavors, however, planning will help ensure an accurate, consistent, implementation of Eclipse SE. The chapters in this document include recommended planning steps for each task, as well as the details you need to implement Eclipse SE.

For larger organizations, it may be worthwhile to implement specific standards for case management in Eclipse SE.

Where To Go from Here

One of the first steps you should complete is to identify the employees who will serve as the Eclipse SE administrative team. Depending on the size of your organization, you will have one or more Super Administrators and one or more Case Administrators.

With your administrative team in place, all aspects of Eclipse SE implementation can be completed and your organization can start using the Eclipse SE Desktop for all documentation evaluation and preparation required for the discovery process.

Go to [Chapter 3, Managing Eclipse SE Users and Groups](#), to define administrators, reviewers, and users who will be involved with Eclipse SE.



NOTE: Because some Eclipse SE activities can be performed only by a Super Administrator, it is recommended that at least two Super Administrators be defined. Having more than one Super Administrator helps ensure that someone is available at all times.

3 Managing Eclipse SE Users and Groups

In this Chapter

Overview	3-1
Eclipse SE Security Basics	3-4
Creating and Managing Eclipse SE Users	3-19
Creating and Managing Eclipse SE Groups	3-39
Managing User Sessions	3-50
Working with .XML Files	3-51

Overview

Ipro Eclipse SE combines comprehensive security for the Eclipse SE database with flexibility that allows you to customize the security aspects of the product to meet your organization's needs.

Security is established primarily with the User and Group Management features of Eclipse SE Administration. Security applies to functions in Eclipse SE Desktop as well as Eclipse SE Administration. This chapter explains the concepts of Eclipse SE security and the tasks to be performed for proper management of users and groups.

Types of Security

To manage access to and changes in your Eclipse SE data, an approach that combines user, role, and group identity with specific privileges is used. Specific types of security introduced in this chapter apply to:

- Functions that can be performed in Eclipse SE Administration and/or Eclipse SE Desktop.
- Access to and actions within specific cases (such as making redactions).
- Access to and actions within specific batches (which comprise review passes).
- Ability to view and/or change the database fields of a particular case.

Configuration Task Order

While there is no required order of activities, most administrators will find it useful to define a security approach and at least an initial set of users as one of the first steps in Eclipse SE administration. Your security approach can be refined and users and groups added as you determine the needs for specific cases.

Privileges Required

By default, privileges for managing users and groups are as follows:

- The privileges for managing users and groups are built into the Super and Case Administrator roles.
- **Super Administrators** can perform all Eclipse SE user and group management tasks. Only a Super Administrator can access the User/Group Management workspaces in Eclipse SE Administration.
- **Case Administrators** can perform user and group management tasks that apply to their cases. Optionally, Case Administrators can create cases.

Case Administrators manage users in the Case Management workspace only for their own cases. This includes assigning users and/or groups and changing roles/privileges for users/groups assigned to their cases. Case management from this perspective is explained in [Chapter 6](#).

Before You Begin

When Eclipse SE is first installed, an administrator is defined by the person who installs the product. This administrator is defined in the service layer, and is the initial Super Administrator in Eclipse SE Administration. It is this Super Administrator who will be responsible for all user and group activities until/ unless he or she defines additional Super and/or Case Administrators.

For greatest efficiency, address the following issues before defining security for your organization.

Check license

Ensure that your Eclipse SE license is sufficient for the number of users you want to add. If you have any questions about the number of seats available, contact Ipro Support as explained in "[Contacting Ipro Tech Support](#)" on page [1-10](#).

Evaluate/change system permissions

If Eclipse SE users are granted access to a case(s), but their file system permissions prevent them access to the case database folder, then the users will not be able to see case data. Eclipse SE does not violate or supersede system permissions.

Eclipse SE users need the following file system permissions:

- The **system administrator** needs to have the MODIFY permission for the Eclipse SE system directory and the case database directories.
- **Case administrators** should be granted the MODIFY permission for the entire system directory and any data directories for any cases to which they are assigned.
- All **Eclipse SE users** need at a minimum, READ access to the Eclipse SE system directory. Also:
 - Users need the MODIFY permission for the EclipseSession.udb, SysUserBatch.udb, and SysUserPreferences.udb files that reside in the Eclipse SE system directory.
 - Any user assigned the Eclipse SE privileges to create tags, TIFF-on-the-Fly, import data, ingest natives, ingest images, rebuild indexes, or produce in a case will need to have the MODIFY permission for the case database directory.

Ensure that your Eclipse SE users have the appropriate file system permissions before they begin working in Eclipse SE. See your Microsoft Windows® documentation for details on file system permissions.

Determine password requirements

Eclipse SE allows you to require strong passwords, which must be from 8 to 16 characters long and include at least one uppercase character and one number or special character. If strong passwords are not required, then a password that is 6 - 16 characters long is required.



Recommended: Even if strong passwords are not required, best practices call for passwords with at least one upper- and one lower-case character, both alpha and numeric characters, and at least one special character (such as ! @ # \$, etc.).

To check/change the passwords setting, see "[Configuring System Level Options](#)" on page 2-9. Note that password requirements do not apply to users imported from Active Directory. For these users, passwords are defined in Active Directory.

Plan security approach

Complete the following steps to plan your security approach:

1. Familiarize yourself with Eclipse SE security by reading "[Eclipse SE Security Basics](#)" on page 3-4.
2. Based on the options available, evaluate roles and privileges and determine a security approach for your organization.
3. Determine which users and groups need to be added and assign their roles and privileges based on your security approach. You can add/remove users and groups at any time, as a normal part of Eclipse SE administration.

Eclipse SE Security Basics

Users, Groups, and Roles

Users

Users are individual members of your organization who are defined in Eclipse SE. Users may be reviewers who will tag, annotate, and redact case documents, attorneys or other specialists who will review specific aspects of a case (for example, financial data), and anyone else who should have access to case documents in Eclipse SE Desktop.

Users are able to open only the cases or review batches to which they are assigned. Users can be assigned as individuals or as members of a group. The following figure shows the Eclipse SE Desktop **Open Case** menu and the two ways in which users access case documents.



The tasks a user can perform are based on their role and assigned privileges. When a user is first defined in Eclipse SE Administration, the default “Standard User” (view-only) role is assigned at the system level. Administrators adjust user privileges as explained later in this chapter.

In addition to privileges for Eclipse SE Desktop, users may also be tasked with administrative and/or monitoring duties that are performed in Eclipse SE Administration.

Groups

Users who will share specific tasks, such as all tagging duties or the review of a particular case, can be combined into a group. Define the privileges for all group members by defining them for the group, and assign the group to cases or batches as needed. Groups allow case activities to be efficiently managed and monitored.

Examples of groups you might want to define include:

- A group of users responsible for the initial review of cases, where documents are assessed and annotated (tagging, redaction, and other mark-ups).
- A group for final case review, during which a quality control check occurs.

Roles

A role is a defined set of privileges. Users and groups are given one of four roles. When a new user is added, he or she will be a Standard User, unless the role is changed.

The following table lists the Eclipse SE user roles and representative responsibilities for each role. Super Administrators can define responsibilities as needed to meet an organization’s needs.

Each role has a specific set of default privileges (listed on page 3-8). If needed, these privileges can be changed at the individual user, group, or case level.

Eclipse SE Roles

User Role	Typical Responsibilities
Standard User	By default, Standard Users have view-only privileges. Add specific privileges to this role to allow a user to perform needed review tasks (or administrative tasks).

Eclipse SE Roles (Continued)

User Role	Typical Responsibilities
Power User	By default, Power Users have most Viewer Privileges (see the table on page 3-8). Removing any of the default privileges will change a Power User to a Standard User. Adding privileges will not change the Power User role.
Case Administrator	<p>The Case Administrator generally manages cases by defining the users and groups to work on a case, setting up the tag palette for a case and performing other case-specific operations.</p> <p>Case Administrators must be assigned to a case in order to have administration privileges for the case.</p> <p>By default, the Case Administrator has all privileges except for the Create New Case privilege (which is optional). Removing any of the default privileges will change a Case Administrator to a Standard User.</p>
Super Administrator	<p>The Super Administrator (also called "Super Admin") generally manages all aspects of the Eclipse SE product and sets up user, groups, and cases to hand off to Case Administrators for case-level administration.</p> <p>The Super Administrator has all privileges and these privileges cannot be changed.</p> <p>Super Administrators cannot be assigned to a group or a case—they have access to all groups and cases by default.</p>
<i>(not set)</i> or None	<p>Users <i>must</i> have one of the above four roles when they are added to Eclipse SE. This is their "basic" user role.</p> <p>Users can have different roles when they are part of a group and/or assigned to a case. The role of <i>(not set)</i> or None exists to allow Eclipse SE to ignore a role definition at a particular level and find the desired role or set of privileges. To understand how Eclipse SE determines which role/privileges a user will have for a particular situation, see "How Does Eclipse SE Determine Privileges?" on page 3-13.</p>

Privileges

What are privileges?

Privileges are specific permissions to perform particular activities in Eclipse SE Administration or Eclipse SE Desktop. Note:

- **Role-based privileges:** By default, each Eclipse SE role has a specific set of privileges that a user or group will inherit when a role is selected. (See ["Default privileges"](#) on page 3-8 for default privileges by role.)
- **Customized privileges:** Super Administrators can change any user or group's privileges; Case Administrators can change privileges for users and groups assigned to their cases.

Which privileges can be changed?

Privileges that can be changed are listed in ["Default privileges"](#) on page 3-8.

A Super Administrator has all privileges for all cases. Case Administrators have all privileges for the cases to which they are assigned; the Create New Case privilege is optional for Case Administrators.

Privileges can be changed for individual users or groups as follows:

- Super Administrators can change privileges for any user (base privileges or privileges set for a case or batch).
- Case Administrators can change roles/privileges for users or groups only for the cases to which they are assigned (change case- and/or batch-level privileges, not a user's base privileges).

Which "privileges" cannot be changed?

The highest administrative duties are not considered "privileges," because they cannot be changed. These duties include:


- Migrating case data:
 - Only a Super Administrator can create a new case by migrating data from a third-party database.
 - Case Administrators can migrate data from a third-party database into an existing case to which they have been assigned.
- Deleting a case:
 - Super Administrators can delete any case.
 - Case Administrators can delete cases to which they have been assigned.

- Creating/changing/deleting users and groups:
 - Super Administrators can manage all aspects of all users and groups.
 - Case Administrators can manage users and groups for the cases or batches to which they have been assigned.

Default privileges

Default privileges for each role are listed in the following two topics:

- ["Eclipse SE Desktop Viewer privileges"](#) on page 3-8
- ["Eclipse SE Case Administrator privileges"](#) on page 3-11

 **NOTE:** If privileges are removed from a particular role, the role becomes Standard User with whichever privileges are assigned. Adding privileges does not change the role.

Eclipse SE Desktop Viewer privileges

The following table lists privileges related to working in Eclipse SE Desktop.

Eclipse SE Desktop Viewer Privileges and Default Role Settings

Privilege	Standard User ^a	Power User ^a	Case Admin. ^b	Super Admin.
(View Only)	X			
Main Desktop <ul style="list-style-type: none"> • Create TIFF on the Fly • Export Data • Launch Native Files • Replicate Data • View Non-Discov. Documents 		ALL	ALL	ALL
Image <ul style="list-style-type: none"> • Create Annotations • Create Redactions • Email Images^c • Modify/Delete Other User's Annotations^d • Print Images • See Underneath Redactions^e • Modify/Delete Other User's Redactions^f • View Annotations 		ALL	ALL	ALL

Eclipse SE Desktop Viewer Privileges and Default Role Settings (Continued)

Privilege	Standard User^a	Power User^a	Case Admin.^b	Super Admin.
Record			ALL	ALL
<ul style="list-style-type: none"> • Add to Pick Lists • Edit a Record • Create a Record^g • Delete a Record^g • Global Replace^g 		X		
		X		
		X		
Tag			ALL	ALL
<ul style="list-style-type: none"> • Apply Doc Level Tags • Apply Page Level Tags • Modify Tag Palette Layout • Override Tag Relationships^h • Remove Other User's Tags • Update Locked Tags • View Tags 		X		
		X		
		X		
		X		
		X		
		X		
Layout		ALL	ALL	ALL
<ul style="list-style-type: none"> • Modify Grid Display • Modify Record View Display • Modify Window Layout 				
Folder		ALL	ALL	ALL
<ul style="list-style-type: none"> • Create Journals • Create Private Foldersⁱ • Create Smart Folders • Delete/Modify Smart Folders • See Smart Folders • View Case Alerts • View Case Instructions 				
Report Privileges		ALL	ALL	ALL
<ul style="list-style-type: none"> • Print Reports^j • Tally 				

Eclipse SE Desktop Viewer Privileges and Default Role Settings (Continued)

Privilege	Standard User ^a	Power User ^a	Case Admin. ^b	Super Admin.
Transcript			ALL	ALL
• View Transcripts		X		
• Edit Transcript Annotations ^k		X		
• Import Transcripts				
• View Transcript Annotations		X		

- a Individual administrative tasks can be assigned to Standard and Power Users; they will be able to perform assigned tasks for the cases to which they are assigned.
- b Case Administrators can perform all tasks for the cases to which they are assigned.
- c The "Email" privilege applies to emailing documents/pages from the **Image** tab and also emailing a native file from the **Quick View** tab.
- d When this privilege is selected, **See Underneath Redactions** is also (must be) selected.
- e See the discussion of redaction privileges on page 3-10.
- f When this privilege is selected, **See Underneath Redactions** is also (must be) selected.
- g May be included only if the **Edit a Record** privilege is selected.
- h This privilege allows users to override tag conflicts or tag relationships in Eclipse SE Desktop as explained in the *Ipro Eclipse SE User's Guide*.
- i The **Create Private Folders** privilege also governs a user's ability to see public folders.
- j Allows user 1) to view and optionally print reports in Eclipse SE Administration and/or Desktop, and 2) to export and/or print tally results in Eclipse SE Desktop.
- k May be selected only if the **View Transcripts** privilege is selected.

About redaction privileges

Reviewers who do not have the privilege to see underneath redactions (called "restricted users" in this discussion), have limited access to content in Eclipse SE Desktop after redactions are added.

When a user *other than* the restricted user adds a redaction, the restricted user is limited as follows in Eclipse SE Desktop:

- **Quick View** and **Extracted Text** tab content is restricted (not viewable).
- The EXTRACTEDTEXT field in the **Record View** tab is restricted.
- The restricted user cannot open the document's native file, if one exists.
- The restricted user is not able to copy OCR text from an EXTRACTEDTEXT field in the **Case View** or other tab in the case pane.

When the user viewing documents is the only person who has added redactions to a particular document, he or she will be able to see the redacted content for that document.



NOTE: If your case(s) contain text fields that may contain content subject to redactions (such as a field containing the body of e-mail documents), you will need to assess users and restrict access to such fields if needed (by applying field-level security as explained in "[Changing Field-level Security](#)" on page 6-11).

Eclipse SE Case Administrator privileges

The following table lists privileges governing administrative tasks.

Eclipse SE Administrator Privileges and Default Role Settings

Privilege	Standard User ^a	Power User ^a	Case Admin. ^b	Super Admin.
Commit Scanned Documents to Case			X	ALL
Create a Tag/Group ^c			X	
Create & Manage Batches			X	
Create New Case ^d				
Export Case Data			X	
Import Case Data			X	
Lock Tag Groups			X	
Merge and Split Documents			X	
Modify a Tag/Group ^e			X	
Modify Case Setup			X	
Modify Tag Relationship Rules			X	
Produce Case ^f			X	
Scan Documents			X	

- a Individual administrative tasks can be assigned to Standard and Power Users; they will be able to perform assigned tasks for the cases to which they are assigned.
- b Case Administrators can perform all tasks for the cases to which they are assigned.
- c **Create a Tag/Group** gives users the ability to create public tags in Eclipse SE Desktop.
- d **Create New Case** gives users the ability to create new cases or to migrate cases from LexisNexis Concordance or AD Summation.
- e Tags can be renamed on the tag palette in the Eclipse SE Desktop if the user has both this privilege and the **Modify Tag Palette Layout** privilege.
- f Controls both production and publishing of cases from within Eclipse SE Administration.

Active vs. Inactive Users

By default, users are **active**, meaning they can access the Eclipse SE database to the extent their privileges and case or batch assignments allow. If needed, individual users can be marked **inactive**, which will prevent them from accessing the Eclipse SE database, regardless of privileges or assignments.

This function can be useful any time you want to control when certain users have access to Eclipse SE. For example, if you use contract reviewers, they can be defined as active users for a particular project or case. Once the project/case is completed, they can be made inactive. When they are rehired for a new project, they can once again be made active.

Security Beyond User and Group Privileges

Privileges have meaning only if users are assigned to specific cases and/or batches (which comprise review passes). Each user, whether as an individual or as a group member, can open only those cases or batches to which he or she has been assigned.

In addition to the privileges given to an individual user or group, roles and/or specific privileges can be assigned at the case, review-pass, and/or database-field level as explained in the following paragraphs.

Case-level security

Case-level security involves defining which users will be allowed to open a case and their privileges when working in the case. See [Chapter 5](#) for details.

Review-pass security

Review-pass security involves defining which users are assigned to batches, and what privileges they have while working with each batch.

Managing access to and privileges for review passes is discussed in [Chapter 12](#).

Database field-level security

Database field-level security also exists for cases. By default, most fields in the Eclipse SE database can be viewed and changed by anyone assigned to a case.

As needed, the Super or Case Administrator can set individual field-level security for a case at the group or user level. Case Administrators can do so only for cases to which they are assigned. Database field-level security is discussed in "[Changing Field-level Security](#)" on page [6-11](#).

Function-specific security

By default, individual functions in Eclipse are available to users as allowed by their base security. For example, a group's right to access case reports is determined by the group's (or individual member's) base privileges.

At times it may be necessary to secure individual functions. For example, you want all of your users to have access to reports, but one specific report needs to be limited to the case administrator group. Access to this report can be secured in this way; this security will take precedence over other security settings.

How Does Eclipse SE Determine Privileges?

Because privileges can be set at the user, group, case and/or review pass level, you may ask, "With so many options, just which privilege settings will be used when a user logs in and opens a case or batch?"

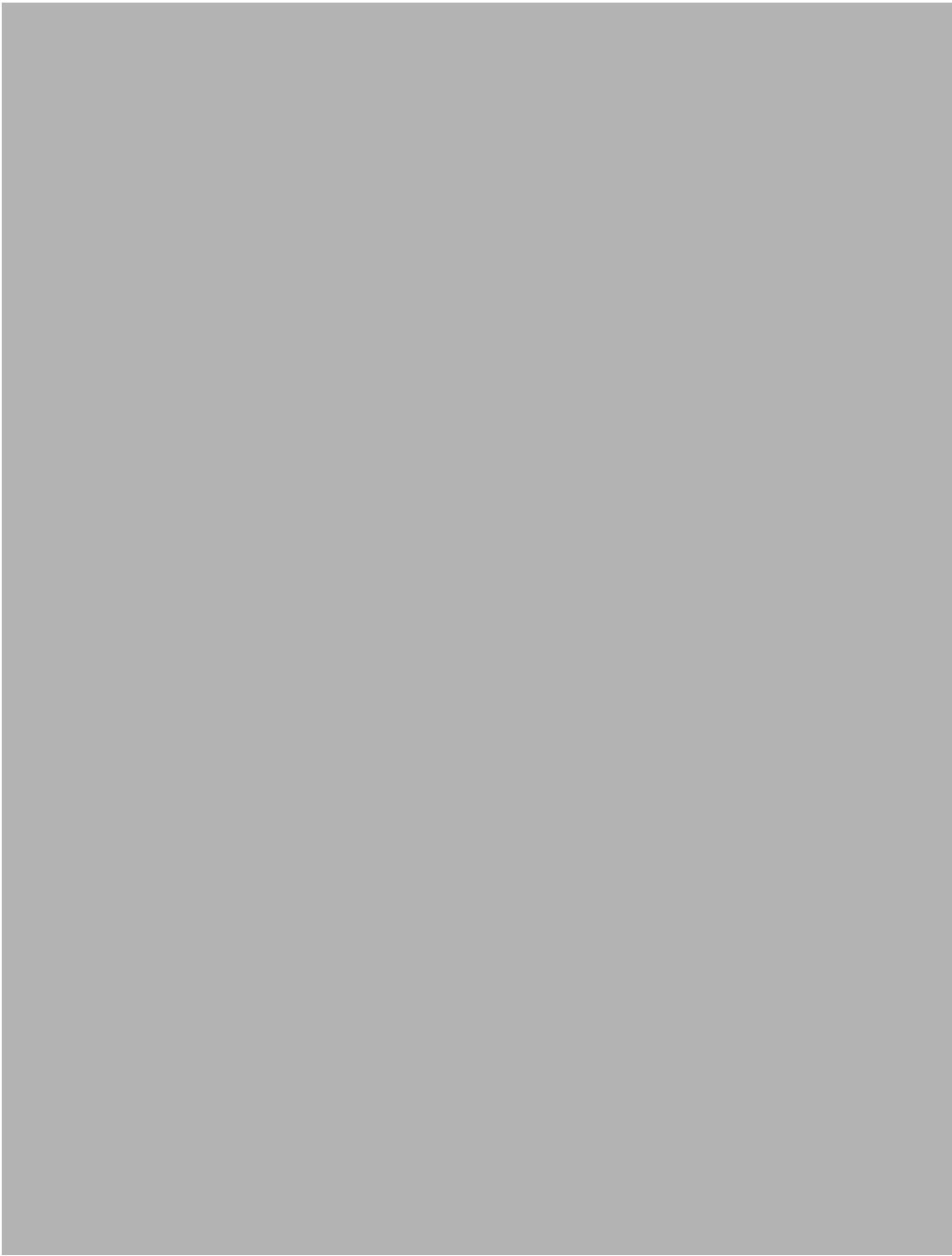
Eclipse SE uses the following privilege "types" and the security determination flowchart shown in the figure on page 3-15 to determine which privileges will apply.

Context	Description
Case/User	A role and/or specific privileges have been assigned to a user in conjunction with a specific case .
Review/ User	A role and/or specific privileges have been assigned to a user in conjunction with a specific review pass (which contains the batches that users open).
Case/ Group	A role and/or specific privileges have been assigned to a group in conjunction with a specific case .
Review/ Group	A role and/or specific privileges have been assigned to a group in conjunction with a specific review pass (which contains the batches that users open).
Member	A role and/or specific privileges have been assigned to a user when he or she is part of a specific group .
Group	A role and/or specific privileges have been assigned to a group .
Base User	A role and/or specific privileges have been assigned to a user . (These are the privileges set in the User Management workspace for the individual user.)

About the security determination flowchart

Regarding the hierarchy of questions shown in the figure, note:

- The order of evaluation is from top to bottom. As soon as an answer is found, the evaluation stops and the corresponding privileges will be applied.
- In this diagram, "set" means a role other than **None** has been selected, and privileges correspond to the chosen role or have been selected by the administrator.
- If a user is assigned to a case in more than one way, see "[What about users with multiple role/privilege settings?](#)" on page 3-16.



What about users with multiple role/privilege settings?

The flowchart on page 3-15 shows how Eclipse SE determines which privileges to use when a user has been assigned to a case or review pass. When the user is assigned in more than one way, the following criteria are used to determine which privileges the user will have:

1. If a user is assigned directly to a case or review pass, the role/privileges set at that level will take precedence over any other settings.
 - a. If the role is set to **None**, the user's base privileges will apply.
 - b. If the user also belongs to a group(s) assigned to the case, the group settings are ignored.
2. If a user is assigned to a case or review pass through more than one group (or with both group and member privileges set), all group-related privileges (member and group) are combined.

Following are some examples showing how multiple assignments are treated.

Multiple Roles/Privileges Examples

No.	Description
1	<p>Case/user role applies (more privileges).</p> <ul style="list-style-type: none"> • Ken belongs to Group C, which has a Standard User role with Report privileges added. • He is assigned to the Hall-Brown case as follows: <ol style="list-style-type: none"> a. directly with a case/user role of Case Administrator. b. as a member of Group C. <p>Result: Case/user privileges always take precedence – Ken will be a Case Administrator.</p>

Multiple Roles/Privileges Examples (Continued)

No.	Description
2	<p>Case/user privileges apply (fewer privileges).</p> <ul style="list-style-type: none"> • Annie belongs to Group C, which has a Power User role. • She is assigned to the Hall-Brown case as follows: <ol style="list-style-type: none"> a. directly with a case/user role of Standard User with only Redaction privileges. b. as a member of Group C. <p>Result: Case/user privileges always take precedence – Annie will have Redaction privileges.</p>
3	<p>User's base privileges apply.</p> <ul style="list-style-type: none"> • Mary's base user role is Standard User, with Tagging privileges added. • Mary belongs to Group G, which has a role of Power User. • Mary is assigned to the Hall-Brown case as follows: <ol style="list-style-type: none"> a. directly, with the case/user role set to None. b. as a member of Group G. <p>Result: Case/user privileges always take precedence over any group settings. Since the case/user role is set to None, the users' base user role/privileges apply. Mary will have Tagging privileges.</p>
4	<p>Combined privileges apply (additive).</p> <ul style="list-style-type: none"> • Gene belongs to Group D, which has Tagging privileges. • He also belongs to Group E, which has Redaction privileges. • Group D and E are both assigned to the Hall-Brown case. <p>Result: Group privileges are combined - Gene will have both Tagging and Redaction privileges.</p>

Multiple Roles/Privileges Examples (Continued)

No.	Description
5	<p>Combined privileges apply (highest level of privileges apply).</p> <ul style="list-style-type: none"> • Debra’s base user role is Power User. • Debra belongs to Group F; Group F’s role is set to None. • Debra also belongs to Group G, which has only Redaction and Folder privileges. • Groups F and G are both assigned to the Hall-Brown case. <p>Result:</p> <p>With Debra’s Group F role of None, her base user privileges are used and will be added to Group G’s privileges. The effect of adding a Power User role to Group G’s limited privileges is that Debra will have Power User privileges.</p>
6	<p>Combined privileges apply (member plus group privileges).</p> <ul style="list-style-type: none"> • Taiyou belongs to Group A, which has a Standard User role with Report privileges. • He is also in Group B, in which he has Member Image privileges. • Group A and Group B are both assigned to the Hall-Brown case. <p>Result:</p> <p>Group privileges are combined, whether they are set for the member individually or the group. Taiyou will have both Report and Image privileges.</p>

Creating and Managing Eclipse SE Users

Before You Begin

For efficient creation and management of users in Eclipse SE:

1. Decide on the approach to use for user name, user ID, and password details.
 - **Name:** For example, decide on the order of first and last names (**John Smith** or **Smith, John**).
 - **User ID:** Determine what you will use for Eclipse SE user IDs. For example, if your organization has employee IDs, it may be most logical to use those IDs. A maximum of 60 characters can be used.
 - **Password:** Determine a password approach that will provide appropriate log-in security for your organization. See "[Determine password requirements](#)" on page 3-3.



No other character limitations or particular formats exist for user information.

2. Consider the methods available for creating users. Some of the benefits of each method are listed in the following table.

Method	Benefit
Manual input	Users can be created "on the fly," without the need to first create a load file.
Import from a plain text file	If you have a list of users, for example, exported from another system, use it to easily add basic user information (user name/ID) to Eclipse SE.
Import from an .XML file	Ideal for transfer of user information. This method allows a load file to be used that includes more detail than a text file.
By using Active Directory	In large organizations with an administrative team and network in place, users can very quickly be added in Eclipse SE, consistent with network information.

Working in Eclipse SE Administration


Tips for working in Eclipse SE Administration:

- Maximize the Eclipse SE Administration window by clicking the Maximize button, , in the window's upper right corner.
- If needed, scroll vertically and/or horizontally to see all information in a particular area.
- For data in tables, sort by a particular column by clicking on the column heading.
- Adjust pane or column widths (some panes/columns):
 - Place the mouse pointer over a column separator until it changes to .
 - Drag the column separator to the left or right to the needed width.
 - Drag the pane separator as needed. For example, drag to the right if you cannot see all controls at the top of the pane (such as the Create and Delete User buttons in the adjacent example).



Creating New Users Manually

To create users one by one in Eclipse SE Administration:

1. Start Eclipse SE Administration and log in as a Super Administrator. (Only Super Administrators can create users.)
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click  as shown in this figure.



If you cannot see the button, expand the width of the pane by dragging its right separator line. If needed, see ["Working in Eclipse SE Administration"](#) on page 3-20.)

5. In the Add User dialog box, enter the new user's name (60 characters maximum), user identification, and a password, per your planning decisions (see ["Before You Begin"](#) on page 3-2). Notes:
 - If possible, complete all fields. As a minimum, enter the User ID.
 - User IDs must be unique.
 - Passwords must be from 6 - 16 characters long. Also see recommendations in ["Before You Begin"](#) on page 3-2.



NOTE: Users can be created without a password; they will *not* be able to log in to Eclipse SE Administration or Eclipse SE without a password, however. Passwords must be defined at some point before users log in.

6. If the added user should not be active at this time, select the **Mark as Inactive** option.
7. Click **OK**.
8. Repeat steps 3 - 6 for all users being added at this time. Users are added as Standard Users with view-only privileges.
9. As needed, change users' roles and/or privileges as explained in ["Change user role and privileges"](#) on page 3-28.
10. Inform users of their Eclipse SE log-in names and passwords.

Importing/Exporting User Details

Import/export from/to a text file

User IDs and names can be imported from a plain text (.TXT) file into Eclipse SE Administration, which can be useful if you have a list of users from another source. User details can also be exported from Eclipse SE Administration into a plain text file. This can be useful for moving/copying Eclipse SE user data, maintaining Eclipse SE records, or other purposes.

Create text file

To create the text file to be imported into Eclipse SE Administration:

1. Use a plain text editor such as Notepad or any program that will allow you to create a plain text (.TXT) file with the following format for user ID and name:

User ID, Full User Name

Use one line for each user ID and name. For example:

```
E100, Jane Smith
E101, John Brown
E102, Sally Doe
```



NOTE: Other characters can be included, as long as a comma separates the user ID from the user name. For example, the user ID might be **E-100**, or the user name might be **Smith, Jane**. Note: To include a comma in the user name, the entry would simply be as follows: **E100, Smith, Jane**.

2. Save the file with an extension of .TXT.

Import text file contents

To import basic information for users from a text file (formatted as explained in "[Create text file](#)" on page 3-22):

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.

4. In the left pane of the User Management workspace, select **Advanced > Import Users > User Names**. (If you do not see the Advanced menu, adjust the pane as explained in "[Working in Eclipse SE Administration](#)" on page 3-20.)
5. In the Select Text File dialog box, navigate to and select the needed text file, then click **Open**.
6. Verify the user details added in the User Management workspace. Users are added as Standard Users with view-only privileges.
7. Add passwords as explained in "[Change user name and/or password](#)" on page 3-29. Users must have passwords in order to log in to Eclipse SE or Administration.
8. As needed, complete these tasks:
 - Change users' roles and/or privileges as explained in "[Change user role and privileges](#)" on page 3-28.
 - Make users inactive as explained in "[Change user activity status](#)" on page 3-30.
9. Inform users of their Eclipse SE log-in names and passwords.

Export user details to a plain text file

To export Eclipse SE user names and IDs to a plain text file:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, select **Advanced > Export Users > User Names**.
5. In the Select Text File dialog box, navigate to the folder where you want the file placed.
6. Enter a name in the **File name** field or select an existing file to be overwritten and click **Save**.
7. In response to the confirmation message, click **OK**.

Import/export user details from/to an .XML file

User and group details can be imported from/exported to an .XML file, which can be useful for moving/copying Eclipse SE user data. .XML files may be obtained by exporting user details from Eclipse as described in the following procedure. For .XML details, see ["Working with .XML Files"](#) on page 3-51.

Import user and group details from an .XML file

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, select **Advanced > Import Users > User Group/XML**, then select whether you want to overwrite or merge with existing data.
5. Navigate to and select the needed .grp file, then click **Open**.
6. Review all details in the Import Groups and Users dialog box, including errors.
7. Click **OK**. As needed, complete these tasks:
 - Change users' roles and/or privileges as explained in ["Change user role and privileges"](#) on page 3-28.
 - Make users inactive as explained in ["Change user activity status"](#) on page 3-30.
8. Inform users of their Eclipse SE log-in names and passwords.

Export user and group details to an .XML file

To export user and group details from Eclipse SE to an .XML file:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, select **Advanced > Export Users > User/Group XML (.grp)**. (If you cannot see the menu, expand the width of the left pane by dragging its right separator line. If needed, see "[Working in Eclipse SE Administration](#)" on page 3-20.)
5. In the Select Group/User definition file dialog box, navigate to the folder in which the file should be created.
6. Enter a name in the **File name** field or select an existing file to be overwritten and click **Save**.
7. In response to the confirmation message(s), click **OK**. The file will be saved with an extension of .GRP.

Comprehensive user information can be imported into Eclipse SE using an .XML file containing the proper syntax, elements, and attributes. All user, group, and group membership details can be imported at one time if desired. For details, see "[Working with .XML Files](#)" on page 3-51.

Import new users from Active Directory

Microsoft's Active Directory[®] service database stores information and user details such as network user names and passwords. Eclipse SE makes it easy to create users based on users defined in your network.

How Eclipse SE works with Active Directory

Eclipse SE uses Active Directory simply to verify a user's credentials. When the user logs in to Eclipse SE, the application performs a quick Active Directory login to ensure the user is valid.

If new employees are added to the domain, they are not automatically added to Eclipse SE. You will need to add them in Eclipse SE as you did for the initial import of Active Directory users.

Eclipse SE does not set any file path rights. The rights assigned to users for the network will not be changed after they log in to Eclipse SE. Eclipse SE adds a layer of security, however, that limits or controls which cases users can access and the activities that can be performed in Eclipse SE.




NOTE: If Eclipse SE users are granted access to a case(s), but their file system permissions prevent them access to the case database folder, then the users will not be able to see case data. Eclipse SE does not violate or supersede file system settings. See "[Evaluate/change system permissions](#)" on page 3-3 for details on file system permissions for Eclipse SE administrators and users.

Configure domain

To configure Eclipse SE users based on Active Directory, the needed domain(s) must be configured in Eclipse SE Administration. If Active Directory domains have not been defined, see "[Configuring System Level Options](#)" on page 2-9.

Once the domain is added to Eclipse SE, create Eclipse SE users based on Active Directory:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, select **Advanced > Import Users > Active Directory**. (If you do not see the Advanced menu, adjust the pane as explained in "[Working in Eclipse SE Administration](#)" on page 3-20.)
5. In the Active Directory dialog box, identify the domains and organizational units from which you want to import users into Eclipse SE. Click to expand each needed domain and unit in the **Active Directory Tree** list.
6. For each unit from which users are to be imported, click the **Members** option as shown in this example. Users who belong to each selected unit display in the center of the dialog box. You may need to wait a few moments as user information is gathered. 
7. In the **Members** list, identify and select the individuals who will be added as users in Eclipse SE.
 - To select all members of a particular organizational unit, simply click the organizational unit name in the **Members** list.
 - To select individuals, click the individual names in the **Members** list.
 - If a user name is blue, it means that the user has already been added to Eclipse SE.

Users are added to the **Users to Create** list in the dialog box and are given the default role of Standard User.

8. As needed, change users' roles – in the **Users to Create** list, change the selection for **Default Role** from Standard User to **Power User**, **Case Admin**, or **Super Admin**.
9. When all users have been added and roles defined, click **OK**.
10. If needed refine user privileges as explained in "[Change user role and privileges](#)" on page 3-28.
11. Inform users that they should use their domain user name and password to log in to Eclipse SE (Administration or Desktop, as applicable to the user).

Displaying Users in the User Management Workspace

About managing users

The procedures presented in "[Changing User Details](#)" on page 3-28 are specific to user configuration activities in the User Management workspace. You can also manage users as follows:

- Users can be managed within groups. See "[Creating and Managing Eclipse SE Groups](#)" on page 3-39.
- Users can be managed in conjunction with a specific case. See "[Managing Assigned Groups and Users](#)" on page 6-13.

Display users by role or status

You must be a Super Administrator to work in the User Management workspace. If you are a case Administrator, see "[Managing Assigned Groups and Users](#)" on page 6-13 to manage the users for your cases.

It can be useful to display users by role or inactive status. To do so:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.

4. In the left pane of the User Management workspace, select **Display**, then take one or more of these actions:
 - To show or hide users with particular roles, select or clear the roles of interest.
 - To view users in a single alphabetical list in the left pane, clear the **Group by Role** option; to show users by role, select this option.
 - To show or hide active users, select or clear the **Show Inactive Users** option.

Changing User Details

Change user role and privileges

About roles and privileges

For details on roles and privileges, see "[Roles](#)" on page 3-5 and "[Privileges](#)" on page 3-7. To change a user's role and privileges in the User Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage users for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.



Note:

- Privileges for a user are changed by *adding* them to, not removing them from, the privileges of the role assigned. For example, a user with the Case Administrator role has all privileges. For that person to have *fewer* privileges, his or her role must be either Standard or Power User, with privileges added as needed.
- If you first give a user a role other than Standard User and then remove a privilege(s), the role will automatically be changed to Standard User, but the privileges defined at that point will still be in effect.
- Super Administrator privileges cannot be changed. To change privileges for a person with that role, you must first select a different role.

Procedure

To change a user's role and optionally privileges:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the name of the user whose role is to be changed. If multiple users need to have their roles changed in the same way, click the first user, then Shift+click or Ctrl+click additional users to choose a contiguous or non-contiguous set of users, respectively.

Note: Settings for multiple users can be changed simultaneously only if they have the same role and privileges.

5. Right-click the selected user and select **Modify Role and Privileges**.
6. At the top of the Modify Privileges dialog box, select the needed role, or the role that most closely matches the needed selections.
7. If needed, add or remove privileges.
8. When finished, click **OK**.

Change user name and/or password

You must be a Super Administrator to change user details. The full name and/or password can be changed, but not the user ID. To make changes:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the name of the user whose user name and/or password is to be changed. (Although not generally recommended, you can change multiple users' passwords identically by using Shift+click or Ctrl+click methods to select multiple user names.)
5. To change only the password, select **Modify > Password**, then enter a new password and click **OK**. Ensure sufficient password strength; see "[Determine password requirements](#)" on page 3-3 as needed.

6. To change the user name and/or password, select **Modify > Details** and change the needed information.
7. If needed, inform users of your changes.
8. You may also want to make a list of users/passwords and keep it in a secure location. Passwords cannot be retrieved from Eclipse SE Administration.

Change user activity status

For details on activity status, see "[Active vs. Inactive Users](#)" on page 3-12. To make a user active or inactive:


1. If the user is to be made inactive and is logged in to Eclipse SE Administration or Desktop, tell them to log out.
2. Start Eclipse SE Administration and log in as a Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, click the name of the user whose status is to be changed. If multiple users need to their status changed identically, click the first user, then Shift+click or Ctrl+click additional users to choose a contiguous or non-contiguous set, respectively.
6. Right-click the selected user and select **Modify Active Status > Mark as Inactive** (or **Mark as Active** if the user was inactive).
7. Inform affected users of their status.

Managing a User's Case Assignments

Assign cases to a user

To assign one or more cases to a user using in the User Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage users for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.

Ensure that cases have been created as explained in [Chapter 5](#), then complete the following steps:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the user to which a case is to be assigned.
5. In the **Case Assignments** section of the workspace, click the Modify Case Assignments button, .
6. In the Select Cases dialog box, select the case(s) to which the user should be assigned, then click **OK**.
7. Repeat steps 3 - 5 for other users who need to be assigned to cases.
8. If needed, change the case-level role and/or privileges for the user(s) as explained in the next procedure.

When a user logs in to Eclipse SE Desktop, the cases assigned here will be available to the user.

Assign a case/user role and privileges

About case/user role and privileges

Users can have a specific role and/or privileges in conjunction with their case assignment. This is called the "case/user" role and privileges.

This role/these privileges will be in effect only when the user is working in the case. By default, a user has no case-related role or privileges.

For details on how Eclipse SE manages users roles/privileges, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Procedure

To assign a case-specific role and privileges in the User Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage users for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.

Complete the following steps to assign a case/user role and/or privileges:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the user for which a case/user role and/or privileges are to be assigned.
5. In the **Case Assignments** section of the workspace:
 - a. Click the case for which the user's role/privileges are being defined.
 - b. Right-click the selected case and select **Modify Role and Privileges** from the context menu.
6. In the Modify Privileges dialog box, select the needed role, then change privileges if needed. See "[About roles and privileges](#)" on page 3-28 for details about changing privileges from those of the role.
7. When finished, click **OK**. The user will now have the assigned role/privileges when working in the case selected in step 4.
8. If needed, inform the user of the changes.

Review a user's case/user role

To clarify the role and privileges that a particular user has for a particular case, complete the following steps:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the user of interest.
5. Take one of the following actions:
 - If the user is assigned directly to the case of interest, in the Case Assignments area, right-click the case name and select **View > Case Access**.
 - If the user is assigned to the case by virtue of group membership, then review the details for the case as explained in "[Review a user's role or privileges](#)" on page 6-16.

A summary displays in the User Case Access dialog box, as shown in the following figure. If a user has multiple settings, privileges are additive, and the cumulative privileges will be listed.



See "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13 to review the types of Eclipse SE security.

6. When finished, click **Close Window**.

Remove a case/user role and privileges


Case/user role and privileges that have been assigned (as explained in the previous topic) can be removed as follows:

1. If the user is working on the case, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, click the needed user.
6. In the **Case Assignments** section of the workspace:
 - a. Click the case for which the user's role/privileges are to be removed.
 - b. Right-click the selected case and select **Clear Role and Privileges** from the context menu. The case/user role changes to (*not set*), and the role/privileges take effect as explained in "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Remove case assignments

Only a Super Administrator can remove one or more cases for a user in the User Management workspace. Case Administrators should manage their cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.


To remove a case(s) from a user:

1. If the user is working on the case, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, click the user for which the case assignment is to be removed.
6. In the **Case Assignments** section of the workspace, click the Modify Case Assignments button, .
7. In the Modify Case Assignments dialog box, clear the checkmark for cases the user should *not* be assigned to, then click **OK**. The user will no longer have access to these cases.
8. If needed, inform the user of the changes.

Managing a User's Group Assignments

Assign a user to a group

To add an individual user to one or more groups in Eclipse SE, complete the following procedure. To add several users to a group at one time, see "[Add users to groups](#)" on page 3-41.

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the user to be added.
5. In the **Group Assignments** section of the workspace, click the Modify Group Membership button, .
6. In the Modify Group Membership dialog box, select the group(s) to which the user should be added, then click **OK**.
7. If needed, change the user's member role and/or privileges as explained in the next procedure.

Assign a member role and privileges

About member role and privileges

By default, when users are added to a group, they are given no *member* role or privileges. They will have the role/privileges defined for the group.

A user can have his or her own role and/or privileges in conjunction with his or her group membership, however. This is called the "member" role and privileges. This role/these privileges will be in effect only when the user is working in a case to which the group is assigned.

For details on how Eclipse SE manages users roles/privileges, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13. The following procedure explains how to assign the member role/privileges to a user.

Privileges required

To assign a member role and privileges in the User Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage users for your cases as explained in ["Managing Assigned Groups and Users"](#) on page 6-13.

Procedure

Complete the following steps to assign a membership role and/or privileges:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, click the user for which a member role and/or privileges are to be assigned.
5. In the **Group Assignments** section of the workspace:
 - a. Click the group for which the user's role/privileges are being defined.
 - b. Right-click the selected group and select **Modify Role and Privileges** on the context menu.
6. In the Modify Privileges dialog box, select the needed role, then change privileges if needed. See ["About roles and privileges"](#) on page 3-28 for details about changing privileges from those of the role.
7. Click **OK**. The user will now have the assigned role/privileges when working in a case to which the group selected in step 4 is assigned.
8. If needed, inform the user of the changes.


Remove member role and privileges

If a member role and privileges have been assigned as explained in the previous procedure, they can be removed as follows:

1. If the user is working on a case assigned to the group, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, click the needed user.
6. In the **Group Assignments** section of the workspace:
 - a. Click the group for which the member role/privileges are to be removed.
 - b. Right-click the selected group and select **Clear Role and Privileges** on the context menu. The user's member role changes to (*not set*), and the role/privileges take effect as explained in "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Remove a user from a group

To remove an individual user from one or more groups in Eclipse SE, complete the following procedure. To remove several users from a group at one time, see "[Change group membership](#)" on page 3-46.

1. If the user is logged in to Eclipse SE Desktop and working on a case assigned to the group, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as a Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, click the user to be removed from a group.
6. In the **Group Assignments** section of the workspace, click the Modify Group Membership button, .
7. In the Modify Group Membership dialog box, clear the checkmark for the group(s) from which the user should be removed, then click **OK**.

Removing Eclipse SE Users


Any user other than the Super Administrator created during installation can be removed. This administrator is defined in the product's service layer, and does not appear in Eclipse SE Administration.

To remove Eclipse SE users in the User Management workspace, you must be a Super Administrator. This procedure removes the user entirely.

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane, click the name of the user to be removed. If multiple users are to be removed, click the first user, then Shift+click or Ctrl+click additional users to choose a contiguous or non-contiguous set, respectively.
5. Review your selections in the left pane to ensure they are correct.



IMPORTANT! Once you remove users, there is no way to reinstate them other than to add them as new users.

6. In the left pane, click the Delete User button, . (If you cannot see the button, expand the width of the left pane by dragging its right separator line. If needed, see "[Working in Eclipse SE Administration](#)" on page 3-20.)
7. In response to the confirmation message, click **OK**. Deleting a user removes them from the User Management workspace and also groups, cases, review passes, and batches to which they were assigned.

Creating and Managing Eclipse SE Groups

Overview

By creating groups of users who will share specific tasks (such as batch review), case activities can be efficiently managed and monitored. "Groups" on page 3-5 provides an introduction to the use of groups within Eclipse SE.

Privileges required

Only a Super Administrator can create groups and manage users within groups.

Before you begin

Planning will bring you the greatest success in managing your organization's workflow within Eclipse SE. Creating a group includes these major steps:

- Creating the group.
- Adding users to the group.
- Assigning a role and/or specific privileges to the group and/or specific users within the group.
- Assigning cases to the group.

For greatest efficiency, determine the following information before you begin:


- Naming conventions for your groups. A maximum of 60 characters is allowed for each group name.
- The groups you will need
- Group details:
 - Group's role (and privileges, if different from those of the role)
 - Users who will be members of each group³
 - Cases that will be assigned to each group

3. Each user can belong to up to 100 groups.

Adding a New Group

Add a group manually

You must be a Super Administrator to create groups. To add a new group in Eclipse SE Administration:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click . (If you cannot see the button, expand the width of the left pane by dragging its right separator line. See ["Working in Eclipse SE Administration"](#) on page 3-20.)
5. In the Add Group dialog box, enter a unique group name (60 characters maximum), plus a description if desired. Descriptions can be up to 160 characters.
6. Click **OK**.
7. Repeat steps 3 - 5 for all groups being added at this time. Groups are initially added with no role, meaning users will have the role/privileges assigned to them as users.
8. Complete the following procedures as needed:
 - ["Add users to groups"](#) on page 3-41.
 - ["Assign cases to groups"](#) on page 3-42.
 - ["Define group role and privileges"](#) on page 3-43.Note that Case Administrators can manage groups for cases assigned to them as explained in ["Managing Assigned Groups and Users"](#) on page 6-13.
9. If needed, inform users that they are now part of a group(s).

Import/export groups from/to an .XML file

Comprehensive group information can be imported from/exported to an .XML file containing the proper syntax, elements, and attributes. All user, group, and group membership details can be imported at one time if desired. For details, see ["Import/export user details from/to an .XML file"](#) on page 3-24.

Displaying Groups in the Group Management Workspace

About managing groups

The following procedures are specific to the Group Management workspace. Groups can also be managed as follows:

- Group assignments can be made as part of user management. See "[Managing a User's Group Assignments](#)" on page 3-35.
- Users can be managed in conjunction with a specific case. See "[Managing Assigned Groups and Users](#)" on page 6-13.

Display groups by role


It can be useful to display groups by role. To do so:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, select **Display**, then take one or more of these actions:
 - To show or hide only groups with particular roles, select or clear the roles of interest.
 - To view users in a single alphabetical list in the left pane, clear the **Group by Role** option; to show users by role, select this option.

Adding Group Details

Add users to groups

To add users to a group in Eclipse SE Administration from the Group Management workspace, complete the following steps.

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group to which users will be added.
5. In the **Membership** area of the workspace, click .

6. In the Modify Group Membership dialog box, select the users to be added to the group, then click **OK**.
7. Continue with additional group definition as explained in the following procedures.




NOTE: Users should not be assigned to more than one group that will be assigned to a specific case.

Assign cases to groups

Cases can be assigned to a group at the case level or the batch level. The following procedure applies to case-level assignment.

To assign cases to a group in the Group Management workspace:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group to which the case is to be assigned.
5. In the **Case Assignments** area of the workspace, click .
6. In the Select Cases dialog box, select the case(s) to which the group should be assigned, then click **OK**.

When a group member logs in to Eclipse SE Desktop, the cases assigned to the group will be available to the group member.

Define group role and privileges

By default, groups are added with no role specified. To understand the implications of setting or not setting a group role, see ["How Does Eclipse SE Determine Privileges?"](#) on page 3-13.

To assign a role and privileges to a group in the Group Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage group roles for your cases as explained in ["Managing Assigned Groups and Users"](#) on page 6-13.

To assign a group role in the Group Management workspace:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group for which the role is to be changed. If multiple groups have an identical role/privileges, and the role/privileges need to change identically, click the first group, then Shift+click or Ctrl+click additional groups to choose a contiguous or non-contiguous set, respectively.

Note: You cannot change multiple groups if their settings are not identical.

5. Right-click the selected group and select **Modify Role and Privileges** from the context menu.
6. In the Modify Privileges dialog box, select the role, and privileges if needed, for the group(s), then click **OK**.

Note: A group cannot have the Super Administrator role.

Assign case/group privileges

About case/group role and privileges

Groups can have a specific role and/or privileges in conjunction with their case assignment. This is called the "case/group" role and privileges.

This role/these privileges will be in effect only when group members are working in the case. By default, a group has no case-related role or privileges.

For details on how Eclipse SE manages group roles/privileges, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Procedure

To assign a case-specific role and privileges in the Group Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage groups for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.

Complete the following steps to assign a case/group role and/or privileges. (This procedure assumes you have assigned case(s) to the group as explained in "[Assign cases to groups](#)" on page 3-42.)

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group for which a case/group role and/or privileges are to be assigned.
5. In the **Case Assignments** section of the workspace:
 - a. Click the case for which the group's role/privileges are being defined.
 - b. Right-click the selected case and select **Modify Role and Privileges** from the context menu.
6. In the Modify Privileges dialog box, select the needed role, then change privileges if needed. See "[About roles and privileges](#)" on page 3-28 for details about changing privileges from those of the role.
7. When finished, click **OK**. The group will now have the assigned role/privileges when working in the case selected in step 4.
8. If needed, inform the group members of the changes.

Assign a member's group role and privileges

About the member role and privileges

A user can have a unique role and privileges in conjunction with their group assignment (different from the group role/privileges). This is called the "member" role and privileges.

The member role/privileges will be in effect only when the user is working on a case to which the group is assigned. For details on how Eclipse SE manages users roles/privileges, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Procedure

To assign a member role and privileges in the Group Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage users for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.

Complete the following steps to assign a specific role and privileges to a group member:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the User Management workspace, click the group for which a member's role and privileges are to be assigned.
5. In the **Membership** section of the workspace:
 - a. Click the user for which the membership role/privileges are to be added.
 - b. Right-click the selected user and select **Modify Role and Privileges** in the context menu.
6. In the Modify Privileges dialog box, select the needed role, then change privileges if needed.
7. When finished, click **OK**. The user will now have the membership role/privileges when working in cases assigned to the group.
8. If needed, inform the user of the changes.

Managing Group Details


Change group description

If needed, change the description for a group as follows. You cannot change a group's name.

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, double-click the group for which the description is to be changed.
5. In the Modify Group dialog box, enter a new description and click **OK**.

Change group membership


You can change the users in a group after it is initially defined. To change group membership in the Group Management workspace, complete the following steps:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group for which members are to be changed
5. In the **Membership** area of the workspace, click .
6. In the Modify Group Membership dialog box, select or clear members as needed.
7. When membership changes are complete, click **OK**.

Change case assignments

Cases can be added to or removed from a group after it is initially defined. To change case assignments in the Group Management workspace:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.

3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group for which the case is to be removed.
5. In the Case Assignments area of the workspace, click .
6. Select or clear the cases as needed, then click **OK**.

Change a group's role and privileges

A group's role/privileges can be changed if needed.

To change a role and privileges for a group in the Group Management workspace, you must be a Super Administrator. If you are a Case Administrator, manage group roles for your cases as explained in "[Managing Assigned Groups and Users](#)" on page 6-13.

To change a group role in the Group Management workspace:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, complete step 4 or 5 as needed.
5. To remove a group role/privileges, right-click the group and select **Clear Role and Privileges**.
6. To change a group's role or privileges:
 - a. Right-click the group and select **Modify Role and Privileges**.
 - b. Make needed changes in the Modify Privileges dialog box and click **OK**.

Remove case/group role and privileges

Case/group role and privileges that have been assigned (as explained in "[Assign case/group privileges](#)" on page 3-44) can be changed or removed as follows:

1. If a group member is working on the case, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as Super Administrator.
3. Click the **Case Management** tab.

4. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
5. In the left pane of the Group Management workspace, click the needed group.
6. Right-click the selected case and select **Clear Role and Privileges** from the context menu. The case/group role changes to *(not set)*, and the role/privileges take effect as explained in "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Remove a user's membership role and privileges

If a member role and privileges have been assigned to a user, they can be removed. The member's role changes to *(not set)*, and the role/privileges take effect as explained in "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

To remove a user's membership role and privileges:

1. If the user is logged in to Eclipse SE Desktop and working on a case assigned to the group, notify the user to exit the case.
2. Start Eclipse SE Administration and log in as Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
5. In the left pane of the User Management workspace, click the needed group.
6. In the **Membership** section of the workspace, click the user whose membership role/privileges are to be changed and complete step 6 or 7 as needed.
7. Right-click and select **Clear Role and Privileges**. The user's membership role changes to *(not set)*.
8. If needed, inform the user of the changes.


Removing Groups

To remove a group that is no longer needed:

1. Start Eclipse SE Administration and log in as Super Administrator.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **Group Management**.
4. In the left pane of the Group Management workspace, click the group to be removed. If more than one group is to be removed, click the first group, then Shift+click or Ctrl+click additional groups to choose a contiguous or non-contiguous set, respectively.
5. Review your selections in the left pane to ensure they are correct.



IMPORTANT! Once you remove a group, there is no way to reinstate it other than to add it as a new group.

6. Click the Remove Group button, .
7. In response to the confirmation message, click **OK**.

Managing User Sessions

Eclipse SE user sessions can be identified and monitored, which can be useful for administrative purposes. Each session represents an active user and the use of a single Eclipse SE license.

If a user encounters a problem (for example, his or her computer shuts down unexpectedly), the corresponding Eclipse SE license will be locked until the system timeout value (often 30 minutes or more) is reached. If all licenses are in use, the license can be unlocked to allow the user to continue working as soon as the problem is solved.⁴

To end a user session:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **System Management** tab.
3. In the navigation panel, expand the **System Management** menu and click **Manage User Sessions**.
4. In the user list, select the user whose license needs to be unlocked. (If multiple licenses need to be unlocked, select them by using Shift+click or Ctrl+click). A typical list is shown in the following figure.



5. Click **Close User Session**.
6. When finished, click **Done**.

4. If all licenses are *not* in use, then an available license will automatically be assigned when the user starts working again.

Working with .XML Files

Importing New Users and Groups from an .XML File

Comprehensive user and group information can be imported into Eclipse SE Administration using an .XML file containing the proper syntax, elements, and attributes. All user, group, and group membership details can be imported at one time if desired.

An .XML file can be created as explained in the following paragraphs, or a file can be created with the Eclipse SE Administration Export function explained in ["Exporting User and Group Details to an .XML File"](#) on page 3-61.

For those users who plan to create their own .XML file, it is assumed that you have the requisite .XML knowledge. To understand the elements and attributes that can be defined in the file, read the rest of this chapter.

Creating the .XML file

To create the .XML file to be imported into Eclipse SE Administration:

1. Export an .XML file from Eclipse SE or create an .XML file using any program that will allow you to create a properly defined .XML file with an extension of .GRP.

The basic file content is as shown in the following figure.

2. Include the user attributes listed in the following table.

Notes:

- All elements must be declared, even if you are not going to use the .XML file to define particular information. Use correct .XML syntax for undefined elements, for example, to define only users, include `<Groups />` for the Groups element.
- Attribute values must be included in quotation marks, as in: `UserID="E710431"`
- Multiple attribute values, such as for privileges, must be separated with a comma, as in: `Privilege="8,9,10,16,17,18"`
- All attributes must be included, even if you are not going to use the .XML file for the particular information. In that case, leave the attribute value empty, as in: `Privilege=""`



Basic .XML File Content for User/Group Definition

XML for Defining Groups and Users

Element/ Attributes	Attribute Values	Notes
<code><Root></code>	-	The file's root element.
<code><Groups></code>	-	Container element for all individual Group elements
<code><Group></code>	-	Individual group definition.
<code>GroupID=</code>	Any characters comprising an ID	Group's name

XML for Defining Groups and Users (Continued)

Element/ Attributes	Attribute Values	Notes
Description=	Any characters comprising a description	Description for the group (up to 160 characters)
Role=	0 - 3	Role assigned to the group. See values in " Role attributes " on page 3-54.
Privilege=	1 - 60	Privileges assigned to the group. See values in " Privilege attributes " on page 3-55.
<Users>	-	Container element for all individual User elements.
<User>	-	Individual user definition.
UserID=	Any characters comprising an ID	User's identification
FullName=	Any characters comprising a name	User's name
Inactive=	0	Active user
	1	Inactive user
Role=	0 - 3	Role assigned to the user. See values in " Role attributes " on page 3-54.
Privileges=	1 - 60	Privileges assigned to the user. See values in " Privilege attributes " on page 3-55.
<GroupRoles>	-	Container element for a user's Group Role elements.
<GroupRole>	-	A user's group role and privilege details when they differ from that of the group.

XML for Defining Groups and Users (Continued)

Element/ Attributes	Attribute Values	Notes
GroupID=	The group's name exactly as it is defined	Group to which the user belongs in which the following role/privileges apply. This group must be defined either in the .XML file's Group section, or in Eclipse SE Administration.
Role=	0-3	The user's role within the group. See values in " Role attributes " on page 3-54.
Privilege=	1 - 60	The user's privileges within the group. See values in " Privilege attributes " on page 3-55.

3. Save the file with an extension of .GRP.

Role attributes

Use the following attributes to define roles in the .XML file.

Attribute Value	Definition
0	Standard User or None (<i>Not Set</i>)*
1	Power User
2	Case Administrator
3	Super Administrator

- * If the attribute 0 is used with *no* privileges assigned, then the role will be None, or (*not set*). This can be used for group or group role definitions (not individual user).
If the attribute 0 is used with the privilege attribute of 4, the role will be Standard User (view-only). See the description for attribute 4 in "[Privilege attributes](#)" on page 3-55.

Privilege attributes

Use the attributes listed in the following table to specify user or group privileges in the .XML file. See ["Default privileges"](#) on page 3-8 for more information on these privileges.

Privilege Attributes

Privilege Group	Privilege Description	Privilege #
Standard User (View-Only) Designator	Use this privilege with the Standard User Role (role attribute 0) to define a Standard User with view-only privileges. This may be used as part of a user, a group, or a group role definition. If a user is to have the Standard User role with some additional privileges, this attribute is also included.	4
Administrator Privileges	Commit Scanned Documents to Case	59
	Create a Tag/Group	25
	Create and Manage Batches	51
	Create New Case	61
	Export Case Data	7
	Import Case Data	1
	Lock Tag Groups	28
	Merge and Split Documents	49
	Modify a Tag/Group	31
	Modify Case Setup	62
	Modify Tag Relationship Rules	34
	Produce Case	2
	Scan Documents	58

Privilege Attributes (Continued)

Privilege Group	Privilege Description	Privilege #
Folder Privileges	Create Journals	44
	Create Private Folders	40
	Create Smart Folders	41
	Delete/Modify Smart Folders	43
	See Smart Folders	42
	View Case Alerts	46
	View Case Instructions	32
Image Privileges	Create Annotations	15
	Create Redactions	17
	Email Image(s)	50
	Modify/Delete Other Users' Annotations	16
	Print Image(s)	23
	See Underneath Redactions ^a	19
	Modify/Delete Other Users' Redactions ^b	18
	View Annotations	39
Layout Privileges	Modify Grid Display	38
	Modify Record View Display	47
	Modify Window Layout	37

Privilege Attributes (Continued)

Privilege Group	Privilege Description	Privilege #
Main Desktop Privileges	Create TIFF/PDF on the Fly	9
	Export Data	12
	Launch Native Files	10
	Replicate Data	57
	View Non-Discovery Documents	11
Record Privileges	Add to Pick Lists	56
	Edit a Record	21
	Create a Record ^c	20
	Delete a Record ^c	24
	Global Replace ^c	14
Report Privileges	Print Reports	48
	Tally	52
Tag Privileges	Apply Doc Level Tags	26
	Apply Page Level Tags	36
	Modify Tag Palette Layout	33
	Override Tag Relationships	35
	Remove other User's Tags	27
	Update Locked Tags	29
	View Tags	30

Privilege Attributes (Continued)

Privilege Group	Privilege Description	Privilege #
Transcript Privileges	View Transcripts	53
	Edit Transcript Annotations ^d	55
	Import Transcripts	60
	View Transcript Annotations ^d	54

- a See the discussion of redaction privileges on page 3-10.
- b May be included only if the See Underneath Redactions privilege is selected.
- c May be included only if the Edit a Record privilege is selected.
- d May be included only if the View Transcripts privilege is selected.

Roles and privileges examples

The following table lists various user and group scenarios and explains how the roles and privileges will be specified in the .XML file.

User/Group	What is Needed	XML Example
User 1	User 1 needs a "base" user role of Standard User (view-only privilege).	In a <User> section... Role="0" Privileges="4"
User 2	User 2 needs a base user role of Standard User with some privileges.	In a <User> section... Role="0" Privileges="4,15,16,17"
User 3	User 3 needs a member role of <i>(not set)</i> .	In a <GroupRole> section... Role="0" Privileges=""
User 4	User 4 needs a member role of Power User with some additional privileges.	In a <GroupRole> section... Role="1" Privileges="1,7"
Group 1	Group 1 needs a group role of Case Administrator with no additional privileges.	In a <Group> section... Role="2" Privileges=""
Group 2	Group 2 needs a group role of <i>(not set)</i> so that individual user role/privileges will be used.	In a <Group> section... Role="0" Privileges=""

Importing .XML File Contents

Once an .XML file has been created, import it as follows:

1. If the extension on the .XML file is not .GRP, change the extension to .GRP.
2. Start Eclipse SE Administration and log in as a Super Administrator.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
5. In the left pane of the User Management workspace, select **Advanced > Import Users > User/Group XML (.grp)** and one of the following commands:
 - **Overwrite Existing Data:** Users and/or groups in the .grp file that are already defined in Eclipse SE will have their roles/privileges/descriptions/memberships overwritten. Users and/or groups in the .grp file that are not defined in Eclipse SE will be created.
 - **Merge With Existing Data:** Users and/or groups in the .grp file that are already defined in Eclipse SE will *not* have their roles/privileges/descriptions/memberships overwritten. Users and/or groups in the .grp file that are not defined in Eclipse SE will be created.

(If you cannot see the menu, expand the width of the left pane by dragging its right separator line. If needed, see ["Working in Eclipse SE Administration"](#) on page 3-20.)

6. In the Import Groups and Users dialog box, click **Select Import File**.
7. In the Select Group/User definition file dialog box, navigate to and select the needed .XML (.GRP) file, then click **Open**.
8. Review the information presented on all tabs of the dialog box. If the information is satisfactory, click **OK**.

If the information does not appear as expected, or too many problems are listed on the Errors tab, click **Cancel**, then review and correct your .XML file. See ["Creating the .XML file"](#) on page 3-51 for details.

9. Depending on what was defined in the .XML file, you may need to complete user definitions as described elsewhere in this chapter. For example, if you did not define privileges in the file, you may want to change certain user's privileges as explained in ["Change user role and privileges"](#) on page 3-28.
10. If needed, inform users of their Eclipse SE log-in names and passwords.

Exporting User and Group Details to an .XML File

User and group details can be exported to an .XML file, which can be useful for moving/copying Eclipse SE user data.

To export user and group details from Eclipse SE to an .XML file:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **User/Group Management** menu and click **User Management**.
4. In the left pane of the User Management workspace, select **Advanced > Export Users > User/Group XML (.grp)**. (If you cannot see the menu, expand the width of the left pane by dragging its right separator line. If needed, see "[Working in Eclipse SE Administration](#)" on page 3-20.)
5. In the Select Group/User definition file dialog box, navigate to the folder in which the file should be created.
6. Enter a name in the **File name** field or select an existing file to be overwritten and click **Save**.

In response to the confirmation message(s), click **OK**. The file will be saved with an extension of .GRP.

4 Configuring and Managing Clients

In this Chapter

Overview	4-1
Configuration Task Order.....	4-1
Privileges Required	4-1
Before You Begin	4-2
Adding Clients in Eclipse SE	4-3
Adding New Clients.....	4-3
Viewing Client Information.....	4-4
Managing Clients	4-4
Changing Client Details	4-4
Deleting Clients.....	4-5

Overview

Clients are the foundation of your business. Ipro Eclipse SE Administration provides an easy way for you to manage and organize client information in conjunction with case management and production activities.

Configuration Task Order

A client identifier (client ID) is required when you create a case. Therefore, clients must be defined in Eclipse SE Administration before cases can be created.

Privileges Required

You must have Super Administrator rights to configure and manage client details.



Before You Begin

For greatest efficiency, consider the following steps before adding clients in Eclipse SE.

1. Client identification (ID) is required, and each ID must be unique.

Define an ID approach for consistency. For example, decide whether the ID will be by client name (such as last name or complete name), an account ID used elsewhere in your firm, etc.

The Client ID can be no more than 60 characters⁵ and the following characters cannot be used: . / ? < > \ : * |

2. Decide on and gather other client information to be included in Eclipse SE. Client ID is required; the following details are optional. Limitations are shown in parentheses.

- Address (two fields available, 260 characters each)
- Contact name (160 characters)
- Telephone number (260 characters)
- Email address (260 characters)
- Web address (260 characters)
- Notes (510 characters)


Clients can be added or removed at any time as a normal part of administration.

-
5. From a database management perspective, the client name is truncated at 30 characters and spaces and special characters are removed.

Adding Clients in Eclipse SE

Adding New Clients

To add clients to the Eclipse SE Database:

1. Log in to Eclipse SE Administration as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Client Management**.
4. If needed, adjust the size of the Client Management workspace as explained in "[Viewing Client Information](#)" on page 4-4.
5. In the **Client List**, click the Add Client button, .
6. In the Add Client dialog box, enter a Client ID and details for your client, per the requirements listed in "[Before You Begin](#)" on page 4-2 and your planning decisions.





TIPS:

- Press the Tab key to move from field to field (top to bottom and/or left to right). Pressing Shift+Tab moves from bottom to top and/or right to left.
- To add multiple lines in the **Notes** field, press Ctrl+Enter at the end of each line.
- While in the Add Client dialog box, use Ctrl+Z to undo your last action within a field; the cursor must be in the field you want to undo.

-
7. When all information for the client is entered, click **OK**. The client information is added to the first available row in the **Client List**.
 8. Repeat these steps for all clients to be added.

Viewing Client Information

Depending on the size of your computer display and the information added for clients, you may want to take the following actions to view all client information on your computer screen and/or find needed information:

- Maximize the Eclipse SE Administration window by clicking the Maximize button,  in the window's upper right corner.
- Adjust column widths:
 - In the column headings, place the mouse pointer over a column separator until it changes to :
 - Drag the column separator to the left or right to the needed width.
 - If needed, scroll vertically and/or horizontally to see all information in the **Client List**.
- Sort data in a particular column by clicking on the column heading.

Managing Clients

Once clients have been added to the **Client List**, anyone with the Super Administrator role can manage client details as explained in the following paragraphs.

Changing Client Details

All details except the client ID can be changed. To change client details:


1. Log in to Eclipse SE Administration as a Super Administrator.
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Client Management**.
4. In the **Client List**, find the client for which details need to be changed and click the client's row.
5. Double-click the client in the **Client List**.
6. Make needed changes in the Modify Client dialog box, then click **OK**.

Deleting Clients



NOTE: Clients can only be deleted if no cases are associated with them. Client-case associations cannot be changed once a case is created. Therefore, the only way to delete a client is to delete associated cases as explained in "[Deleting a Case](#)" on page 6-8.

To delete one or more clients from the **Client List**:

1. Log in to Eclipse SE Administration as a Super Administrator.
2. Ensure no cases are associated with the client. See note above.
3. Click the **Case Management** tab.
4. In the navigation panel, expand the **Client/Case Management** menu and click **Client Management**.
5. In the **Client List**, find the client(s) that need to be deleted.
6. To delete one client, click the client's row and skip to [step 9](#).
7. To delete multiple clients, click the row of the first client to be deleted, then either Shift+click the last of a contiguous set of rows, or Ctrl+click a set of non-contiguous rows.
8. When all clients for deletion are selected, double-check your selections to make sure the selected clients are those to be deleted. You cannot undo a deletion.
9. Click the Delete Client button, . (If this button is dimmed, it means that a selected client has one or more cases associated with it; see note preceding this procedure).
10. In response to the confirmation message, click **OK**.

5 Creating Cases

In this Chapter

Overview	5-2
Configuration Task Order.....	5-2
Privileges Required	5-2
Before You Begin	5-2
Creating a New Case	5-4
Getting Started	5-4
Step 1: Setting Up a Case.....	5-4
Step 2: Loading a Case Definition	5-5
Step 3: Defining Database Fields	5-11
Step 4: Creating a Tag Palette.....	5-22
Step 5: Create Redaction Palette	5-29
Step 6: Select Case Options.....	5-32
Step 7: Finish Case Creation	5-34
Creating a Case from an Existing Case	5-36
Migrating Cases from LexisNexis Concordance	5-39
Overview.....	5-39
What is required?	5-39
What can be migrated?	5-39
Step 1: Setting Up the Migration.....	5-40
Step 2: Mapping Fields.....	5-45
Step 3: Finishing the Migration	5-49
Step 4: Verifying the Migration	5-50
Step 5: Viewing Imported Tags	5-51
Step 6: Viewing Imported Redaction Categories.....	5-51
Migrating Cases from AD Summation	5-52
Overview.....	5-52
Migrating a Single Case	5-54
Migrating Multiple Cases (Batch Migration).....	5-68
Next Steps	5-70

Overview

The primary focus of Eclipse SE is case management for the discovery process. Eclipse SE Administration provides an easy way for you to create and manage cases in conjunction with review and production activities.

Configuration Task Order

A client ID is required when you create a case. Create clients ([Chapter 4](#)) before you create associated cases. From that point, add and manage cases as required by your organization.

Privileges Required

Super Administrators can perform all Eclipse SE case creation tasks. By default, Case Administrators cannot create cases, but a privilege does exist to allow Case Administrators or other users to create cases and/or migrate cases from LexisNexis Concordance or AccessData Summation.



Before You Begin

You can define a new case in Eclipse SE Administration and import case data, create a case from an existing case, or migrate an existing Concordance or Summation case.

For greatest efficiency, before you start working with Eclipse SE Administration, start with your load file or other case source. Familiarize yourself with the data you will be importing or migrating, including data fields, tags, and redactions if applicable.

Next, “walk through” the case creation steps in Eclipse SE Administration. To do so:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Client/Case Management** menu and click one of the following work tasks:
 - **Create Case (New)**
 - **Create Case (from Existing)**
 - **Migrate Case from Concordance**
 - **Migrate Case from Summation**
 - **Batch Migrate Case from Summation**
3. Review all steps (tabs) and make note of the information you will need for each step. Refer to this chapter for clarification on options and information required.
4. When you have finished reviewing case-creation steps, gather at least the basic information for the case, then proceed to the appropriate section:
 - ["Creating a New Case"](#) on page 5-4
 - ["Creating a Case from an Existing Case"](#) on page 5-36
 - ["Migrating Cases from LexisNexis Concordance"](#) on page 5-39
 - ["Migrating Cases from AD Summation"](#) on page 5-52

Cases can be changed after they are initially defined (explained in [Chapter 6](#)).

Creating a New Case

Getting Started

Creating a case includes seven distinct steps, as outlined in the Create Case workspace and discussed in this section. If you are new to case management, the following information should help you set up cases in Eclipse SE Administration. Experienced administrators may find it very easy to work through the steps (tabs) without referring to this information.



CAUTION: You cannot save a portion of a case definition (such as your entries for steps 1 and 2). If you exit Eclipse SE Administration before completing all of the steps, you will lose your work.

Step 1: Setting Up a Case

The first step in creating a case involves defining the basic case details:

1. In Eclipse SE Administration, click the **Case Management** tab.
 2. In the navigation panel, expand the **Client/Case Management** menu and click **Create Case (New)**.
 3. Click the **Step 1. Set Up Case** tab and enter all information:
 - **Client ID:** Select the client whose case is being defined. If the client is not listed, add it as explained in [Chapter 4](#), then return to creating cases.
 - **Case Name:** Enter a name for the case. This name must be unique and cannot include certain special characters. If a character is not allowed, the entry will turn red. The hyphen, underscore, and parentheses are among the characters allowed. Maximum length is 60 characters.⁶
 - **Matter Number:** This entry is optional. If needed, enter a case matter number of up to 100 characters.
 - **Data Directory:** The location where Eclipse SE will place database-specific files and other files required for the case. A case-specific folder will be created for each case. The entry may be a mapped drive or UNC path, but it must be accessible by all Eclipse SE users. (A UNC path can help ensure this.) The data directory can be one of the following:
 - ♦ The system directory identified when you first logged in (see [page 2-2](#)). This is the default location.
 6. From a database management perspective (within the Ipro database), the case name is truncated at 30 characters and spaces and special characters are removed.
-

- Another directory defined to be the default data directory (see "[Configuring System Level Options](#)" on page 2-9). This directory can optionally be set as the required directory (no override allowed during case creation).
- A user-selected directory (if a required data directory is not defined).

**NOTES:**

- Ensure that the location will be accessible by all Eclipse SE users.
- The maximum length for a fully qualified file name, which includes the case name and data directory path, is 260 characters (<248 characters for the path). Ensure that the case name and path do not exceed this maximum.

4. When finished, continue with "[Step 2: Loading a Case Definition](#)," next.

Step 2: Loading a Case Definition

About case definition options

The second step in creating a case is typically that of defining needed database fields.



NOTE: Each case can include a maximum of 500 fields.

This step can be accomplished in one of four ways:

- **Option 1** (page 5-6): Copy the definition of an existing case. All aspects of the existing case will be used for the new case (make changes as needed):
 - Database field definitions
 - Tag and redaction palettes
 - Stop words and case options

With this option, you have the opportunity to change the case details (fields, tags, etc.) before the case is created.

- **Option 2** (page 5-7): Use a case definition (.CSE) file, which is created as explained in "[Exporting a Case Definition File](#)" on page 6-6. All aspects of a case will be defined (as listed for Option 1), plus you can also include key words and coding forms.
- **Option 3** (page 5-9): Use a load file (.CSV, .DAT, .DLF, or .TXT file). Database field names will be defined.

- **Options 4 and 5** (page [5-11](#)): Start with a template that includes a set of fields. You will define all aspects of the case manually, including changes or additions to the template-provided fields.
 - **Option 4:** Default template. A set of basic system fields is pre-defined.
 - **Option 5:** Native-file ingestion template. Basic system fields plus fields commonly used with native files are pre-defined, including several that correlate to e-mail content.

Option 1: Copy from an existing case

If you have already created cases in Eclipse SE Administration, select this option to use the case definition of an existing case for your new case. The following case details will be copied. All details can be modified for the new case if needed.

- Database field names and types
- Tag palette
- Redaction palette
- Stop words
- Case options⁷



NOTE: If you do not need to review or change case details, it may be faster for you to follow the instructions for "[Creating a Case from an Existing Case](#)" on page [5-36](#).

To copy from an existing case:

1. After completing "[Step 1: Setting Up a Case](#)" on page [5-4](#), click the **Step 2. Load Case Definition** tab.
2. Select **Option 1**.
3. Select the client and case you want to use.
4. Review the copied case details on each of the following tabs. Depending on how closely the existing case matches your needs for the new case, continue with one of the following procedures:
 - "[Step 3: Defining Database Fields](#)" on page [5-12](#)
 - "[Step 4: Creating a Tag Palette](#)" on page [5-22](#)
 - "[Step 5: Create Redaction Palette](#)" on page [5-29](#)
 - "[Step 6: Select Case Options](#)" on page [5-32](#)
 - "[Step 7: Finish Case Creation](#)" on page [5-34](#) (if no changes needed now)

-
7. Tagging level, date format, history/tracking, and import validation options.


Option 2: Load from a case definition file

Eclipse SE Administration allows you to create case definition (.CSE) files, which can serve as “templates” for future cases. Case definition files may include the aspects of a case shown in the following figure (to the extent they exist in the .CSE file):




For details on creating case definition files, see ["Exporting a Case Definition File"](#) on page 6-6.

Complete the following steps to use a case definition file to define the basic aspects of your new case:

1. After completing ["Step 1: Setting Up a Case"](#) on page 5-4, click the **Step 2. Load Case Definition** tab.
2. Select **Option 2**.
3. Click the  button corresponding to Option 2 and navigate to the .CSE file in the Select Case Field Definition File dialog box.
4. Select the .CSE file and click **Open**.

- In the Case Definition dialog box, review the summary information, then select the type of case detail that you want to copy into the new case:

.CSE File Load Options

Option	Description
Select All	All case detail in the .CSE file (per this table) will be used in the new case.
Database Fields	Field names, types, and flags (and control/pick/name list values if they were included in the .CSE file).  NOTE: System fields for which data is automatically calculated or determined (such as FILE_EXT and IMAGECNT fields) are not included; they are created automatically with default names.
Tag Palette	Tag groups and tags
Redaction Palette	All aspects of each redaction category
Stop Words	Words to be excluded from searching
Key Words	Key word name, text/highlight colors, and terms
Coding Forms	Coding forms, including form names, fields, tags, rules, and options
Saved Searches	All saved searches
Options	Tagging level, date format, history/tracking, and import validation options.



NOTE: To properly load the coding form and/or relationship definitions from a .CSE file, field names in the new case must match those defined in the .CSE file. In addition, changes to tag group names may interfere with the proper import of relationships.

- When selection is complete, click **OK**.

7. Review the copied case details on each of the following tabs. Depending on how closely the case details match your needs for the new case, continue with one of the following procedures:
- ["Step 3: Defining Database Fields"](#) on page 5-12
 - ["Step 4: Creating a Tag Palette"](#) on page 5-22
 - ["Step 5: Create Redaction Palette"](#) on page 5-29
 - ["Step 6: Select Case Options"](#) on page 5-32
 - ["Step 7: Finish Case Creation"](#) on page 5-34 (if no changes needed now)

Option 3: Load from a data load file



Note: If you want to migrate an entire case directly from Concordance or Summation, go to ["Migrating Cases from LexisNexis Concordance"](#) on page 5-39 or ["Migrating Cases from AD Summation"](#) on page 5-52.

Load file types for Option 3

The following types of load file that can be used for case definition:

Load File Details

Load File	Description
.CSV	A delimited ASCII text file typically with a delimiter format of quote-comma-quote or commas.
.DAT ^a	A delimited ASCII text file containing field data and metadata exported from Concordance or other product that can create such a file.
.DLF	A .DLF file is a type of Ipro Tech load-file format for the legal industry. It is an .XML file created when a case or data is exported from Ipro Eclipse or other sources. .DLF files can contain all case details defined when a case is exported (as explained in "Exporting Case Data" on page 8-42).
.LFP	An Ipro Tech load file provided by scanning software or conversion programs. Note: The .LFP commands supported by Ipro Eclipse are discussed in Appendix B .



Load File Details (Continued)

Load File	Description
.LST ^a	A Summation file used for import/export of extracted text (document-level OCR) from/to text files.
.OPT	Opticon load file for image data.
.TXT ^a	Plain text file (such as one saved from Concordance, Microsoft Excel [®] , or another database system).

- a It is possible to migrate Concordance or Summation cases directly from those applications to Eclipse SE (with the proper environment); see the applicable sections later in this chapter.

Procedure

To use one of the listed data load files to define the fields for your new case:

1. After completing "[Step 1: Setting Up a Case](#)" on page 5-4, click the **Step 2. Load Case Definition** tab.
2. Select **Option 3**.
3. Click the  button corresponding to **Option 3** and navigate to the file in the Select Load File dialog box.
4. Select the load file and click **Open**.
5. **Delimiters:** When applicable, check the default delimiters and change if needed. To change the **Field** and/or **Quote**⁸ delimiters:
 - a. For each type of delimiter, click  and either select from the list or select **Custom**. If you select from the list, skip to [step 6](#) when the selections are complete. For custom delimiters, continue with steps b – e.
 - b. in the Create Custom Delimiter dialog box, click the option for the type of entry you want to make, **Characters** (plain text) or **Ascii Values**.

-
8. The **Field** delimiter is the character that separates each field. For example, for .CSV files, it is a comma; for Concordance DAT files, it is typically an ASCII 20 control character. The **Quote** delimiter is optional. If used, it is the character that marks the beginning and end of a field's content. For .CSV files this is normally a quotation mark. For Concordance DAT files it is the ASCII 254 character. If the **Quote** delimiter is not applicable to your data, any entry in this field is simply ignored.

- c. For characters, enter the needed character in the top field of the **Characters** column. The ASCII value appears beneath your entry.
 - d. For ASCII values, enter the needed value in the top field of the **Ascii Values** column. The character appears beneath your entry.
 - e. Click **OK**.
6. Review the imported field names and then continue to ["Step 3: Defining Database Fields"](#) on page 5-12 to complete your field definitions.

Options 4 and 5: Use a template

If you are starting "from scratch" and do not have an existing case or file on which your case can be based, follow these steps:

1. After completing ["Step 1: Setting Up a Case"](#) on page 5-4, click the **Step 2. Load Case Definition** tab.
2. Select **Option 4** or **Option 5**:
 - **Option 4**: Default template. The basic system fields are pre-defined.
 - **Option 5**: Native-file ingestion template. Basic system fields plus fields commonly used with native files are pre-defined, including several that correlate to e-mail content.

The following topic provides details about system and user-defined fields; you can also review the list of fields in Eclipse SE Administration (when you select one of these templates) and/or refer to the *Ipro Eclipse SE Field Reference*.



NOTE: In addition to the following details, note that both templates include the Filename and Filepath fields. These are SINGLE_VALUE fields intended to maintain the original file name and path details for native files that are ingested. When these fields exist in your case, Eclipse SE will add file name and path information automatically during native ingestion.

For files extracted from a "container" file (such as a .ZIP or .PST file), the path will also include container details. For example:
C:\Client Documents\Mail.zip->MyMail.pst->MyMessage.msg.

3. Continue with ["Step 3: Defining Database Fields"](#) on page 5-12.

Step 3: Defining Database Fields

Create new fields or change pre-defined or imported fields on the **Step 3** tab.

About Eclipse SE database fields

Eclipse SE provides the following field types for use in case creation:

Basic system field types

The following field types are required for every case and cannot be deleted from a case:

- BEGATTACH
- BEGDOC
- ENDATTACH
- ENDDOC
- EXTRACTEDTEXT
- MD5_HASH
- NATIVE
- SHA1_HASH

Other system field types

The following field types are included in the default case templates and are used for case-specific purposes (CUSTODIAN field) or other reasons (FILE_EXT, etc. are used for reporting purposes such as the in the Case Data Summary Report).⁹

- CUSTODIAN
- DUP_CUSTODIAN
- FILE_EXT
- FILE_ID
- IMAGECNT
- NATIVE_SIZE
- TEXT_SIZE
- UTC_DATETIME

User-defined fields

The following field types can be defined as needed for your case:

- DATE
- DATE_TIME
- DECIMAL
- DELETED^a
- MEMO
- MULTI_VALUE
- NUMERIC
- SINGLE_VALUE
- TIME

- a The DELETED field type is applied to fields deleted from an existing case; useful for administrative purposes.

9. Prior to release 2013.1.0, a FILETYPE field existed. This field is changed by Eclipse SE to the FILE_EXT field when you upgrade to 2013.1.0 or later.

System-generated fields

Eclipse SE generates the following two system fields when a case is created; no user action is required (or possible) regarding the inclusion of these fields:

- _DOCID Includes a system-generated record identifier for internal use.
- _DOCTAGS Includes a list of all tags applied to each document.

These fields appear in some Eclipse SE Administration workspaces (such as when importing or exporting data); it is optional to map or select them for these functions. These fields can be displayed in Eclipse SE Desktop.

Field details

Field details are summarized in the following table.

Table Notes:

1. Field footnotes:

- * Field names marked with an asterisk are required for every case.
- † Field names marked with a dagger indicate that the field value is always automatically determined/calculated by Eclipse SE.

2. Maximum Size details:

- Refers to the maximum stored in the database.
- Values are specified in characters (char.) unless otherwise noted.
- No value indicates that no practical limit exists or that size is not applicable to the field type.

3. Data Type details:

- Database data types are all variable-length Unicode character strings.
- The MEMO data type refers to MEMO, MULTI_VALUE, and EXTRACTED-TEXT fields in which the data exceeds 250 characters in length, for which case data is stored in a special database table.

4. Field mapping: Generally, the fields you define using these field types will match the fields defined in your load files or other source (such as ingested native files). It is possible to map more than one field to a single field in your Eclipse SE case, however. [Chapter 8](#) for details on importing data and/or [Chapter 9](#) for details on ingesting files.

Eclipse SE Field Types

Field	Max. Size ⁽²⁾	Data Type ⁽³⁾	Max. per Case
BEGATTACH*	80 char.	Variable-length string	1
	<ul style="list-style-type: none"> Used for parent/child relationships. For example, an email with attachments. Identifies the first member in a set of related documents (contains the BEGDOC of the first document in the set). 		
BEGDOC*	80 char.	Var.-length string	1
	<ul style="list-style-type: none"> Unique document identifier (image key). If not defined by user, field is created automatically when case is created. A document and its first page will have the same BEGDOC value. Tilde (~) cannot be used in this field. This field sorts in alphabetical (not numeric) order (thus 0001000 and 00000000400000 will both sort before 020). The numeric portion BEGDOC values should be a consistent width in order to maintain proper sort order (for example, values should be ABC-001 and ABC-002, etc., <i>not</i> ABC-001, ABC-0000002, etc.). This field was called "IMAGEKEY" in releases prior to 1.3.3. 		
CUSTODIAN*		Var.-length string	1
	Basic text field; typically used to identify the data owner, for example, in whose office the document was found.		
DATE	8 char. (as stored internally); see notes.	Var.-length string	
	<ul style="list-style-type: none"> Date information. Any standard date format can be imported; if greater than 8 characters, it will be converted to 8-character format. Final date format (regardless of format in load file) is selected during case creation. See "Step 6: Select Case Options" on page 5-32. For details on dates in the load file, see "Importing Case Data" on page 8-6. 		

Eclipse SE Field Types (Continued)

Field	Max. Size (2)	Data Type(3)	Max. per Case
DATE_TIME	14 char. (as stored internally); see notes.	Var.-length string	
	<ul style="list-style-type: none"> • Date and time information together in the same field. Any standard date/time format can be imported. • Format example: <i>mm/dd/yyyy hh:mm:ss AM (or PM)</i>; 24-hour times are converted to 12-hour format. • For details on dates in the load file, see "Importing Case Data" on page 8-6. 		
DECIMAL	Any value from -2GB to +2GB	Var.-length string	
	<ul style="list-style-type: none"> • Any numeric data. • The basic format is <i>n.nnnn...</i> (such as 0.1234...); Eclipse SE will add zeros as needed to match this format, that is, a leading number and decimal value to at least the ten-thousandth place. 		
DELETED	--	--	--
	<ul style="list-style-type: none"> • This field type is reserved for fields in an existing case that you want to delete. • A record of the field is maintained for administrative purposes, but the field is removed from Eclipse SE Desktop and it is not included in administrative functions such as rebuilding the search index. • Deleted fields can be restored if needed. 		
DUP_CUSTODIAN		Var.-length string	1
	<ul style="list-style-type: none"> • This field type is required/used when deduplication is selected for native file ingestion and a specific custodian is selected for ingested files. • Depending on options selected for the ingestion, the selected custodian will be added to either the CUSTODIAN or DUP_CUSTODIAN field. 		
ENDATTACH*	80 char.	Var.-length string	1
	<ul style="list-style-type: none"> • Used for parent/child relationships. For example, an email with attachments. • Identifies the final member in a set of related documents (contains the BEGDOC of the last document in the set). • The BEGATTACH field identifies the first member and the document to which the set is related. • The ENDATTACH value is identified by Eclipse SE and added to the field automatically when images are ingested or created through TIFF on the Fly or bulk TIFF. This field can also be updated automatically by validating images (using Eclipse SE Administration Case Tools). 		
ENDDOC*	80 char.	Var.-length string	1
	<ul style="list-style-type: none"> • Used to identify the final page of a multi-page document. • If the document is a single page, the ENDDOC value will be the same as the BEGDOC value. • The ENDDOC value is identified by Eclipse SE and added to the field automatically in the following situations: when images are imported via an .LFP file or a .DLF file that does not include the fields, if images are created through TIFF on the Fly or bulk TIFF, and/or if images or native files are ingested. 		

Eclipse SE Field Types (Continued)

Field	Max. Size ⁽²⁾	Data Type ⁽³⁾	Max. per Case
EXTRACTED TEXT*	1 GB	<ul style="list-style-type: none"> • ≤250 char.: var. length string • >250 char.: MEMO 	1
	<ul style="list-style-type: none"> • Document's text. Content appears in Extracted Text tab of Eclipse SE Desktop. • Text is originally part of imported case, either in load file or in text files. • If document was originally electronic, text is "extracted" from original file. If originally paper (or came in as an image), text is the result of OCR'ing image. Other types of source documents may/may not include extracted text when imported. 		
FILE_EXT*†	256 char.	Var.-length string	1
	<ul style="list-style-type: none"> • Use to identify native file type, such as Microsoft Word (DOC), Excel (XLS), or text (TXT). • Field is populated automatically by Eclipse SE based on native file types. Should not be edited in Eclipse SE Desktop; certain actions (such as running Case Summary Data Report) will overwrite edits based on Eclipse SE evaluation. • This field was called FILETYPE in releases prior to 2013.1.0 and was not automatically populated. 		
FILE_ID*†	NA	Numeric	1
	<ul style="list-style-type: none"> • ID used by Oracle Outside-in Viewer technology for native file determination and presentation. • Field is populated automatically by Eclipse SE based on native file types. Should not be edited in Eclipse SE Desktop; certain actions (such as running Case Summary Data Report) will overwrite edits based on Eclipse SE evaluation. 		
IMAGECNT*†	NA	Numeric	1
	<ul style="list-style-type: none"> • Document page count. • Should not be edited in Eclipse SE Desktop; will be re-calculated after certain actions, such as any time images are added to a case or when certain reports are generated. 		
MD5_HASH*†	250	Var.-length string	1
	<ul style="list-style-type: none"> • Unique value representing document data; determined by Eclipse SE when native files are ingested (or added if MD5_HASH data is included in an imported load file). • Use to assist in identifying duplicate documents. • MD5HASH values are initially created by a 128-bit algorithm performed on a document during discovery. 		
MEMO	1 GB	<ul style="list-style-type: none"> • ≤250 char.: var. length string • >250 char.: MEMO 	
	Text field that allows large amounts of text.		
MULTI_VALUE	256 char. per value; 1 GB total	<ul style="list-style-type: none"> • ≤250 char.: var. length string • >250 char.: MEMO 	<i>Continued</i>

Eclipse SE Field Types (Continued)

Field	Max. Size (2)	Data Type(3)	Max. per Case
MULTI-VALUE, <i>continued</i>	<ul style="list-style-type: none"> Any multiple-value text data, for example, a list of e-mail recipients. The delimiter separating values is defined as part of the import process. Default is a semicolon (;) but a custom delimiter can be specified. Field type can be changed only to/from MEMO or EXTRACTEDTEXT if field contains data. 		
NATIVE*	256 char.	Var.-length string	1
	<ul style="list-style-type: none"> Path and filename of native file at time of import into Eclipse SE Administration. For ingested native files, the path is as specified for the ingestion (case directory or original file location). This is a default field type added automatically to a case when it is first created. 		
NATIVE_ SIZE*†	NA	Numeric	1
	<ul style="list-style-type: none"> Size, in KB, of each native file in a case. Field is populated automatically by Eclipse SE. Should not be edited in Eclipse SE Desktop; certain actions (such as running Case Summary Data Report) will overwrite edits based on Eclipse SE calculations. 		
NUMERIC	Any value from -2GB to +2GB	Numeric	
	<ul style="list-style-type: none"> Any numeric data. Format of data is as imported or edited. 		
SHA1_HASH*	250	Var.-length string	1
	<ul style="list-style-type: none"> Unique value representing document data; determined by Eclipse SE when native files are ingested (or added if SHA1_HASH data is included in an imported load file). Used during deduplication to identify duplicate files. SHA1_HASH values are initially created by a 160-bit algorithm performed on a document during discovery. 		
SINGLE_ VALUE	1,000 char.	Var.-length string	
	Any single-value text data, such as an Email Subject field.		
TEXT_SIZE*†	NA	Numeric	1
	<ul style="list-style-type: none"> Size, in KB, of the extracted text existing for each document in a case. Field is populated automatically by Eclipse SE. Should not be edited in Eclipse SE Desktop; certain actions (such as running Case Summary Data Report) will overwrite edits based on Eclipse SE calculations. 		
TIME	6 char. (as stored internally); see notes.	Var.-length string	<i>Continued</i>

Eclipse SE Field Types (Continued)

Field	Max. Size (2)	Data Type(3)	Max. per Case
TIME, <i>continued</i>	<ul style="list-style-type: none"> Time information. Any standard time format can be imported or entered (such as 12:00 AM or 23:00:00). If AM or PM is not included with 12-hour value, AM is added. Format example: hh:mm:ss AM (or PM); 24-hour times are converted to 12-hour format. 		
UTC_DATETIME	14 char. (as stored internally); see notes.	Var.-length string	1
	<ul style="list-style-type: none"> Identifies the date and time for files, including daylight savings offsets, for native files that include timezone metadata. Populated automatically by Eclipse SE during native ingestion. (May also be imported if load file includes such data, or added manually to a case. Used in conjunction with a case's Native Time Zone offset to ensure dates (such as those in email headers) are correct in Quick View and for images created by TIFF on the Fly. 		

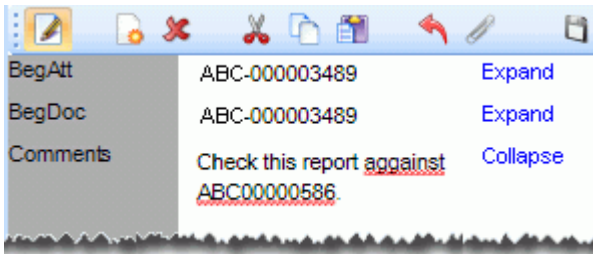
Field options and flags

The options and flags in the following table can be set for fields to provide additional functionality in Eclipse SE Desktop.

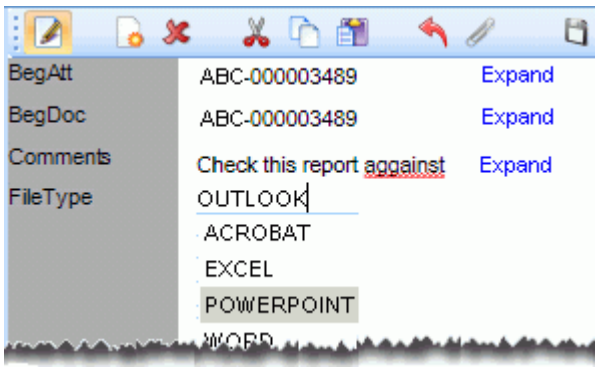


NOTE: Default settings and available options vary by field type; check the selections when creating new fields.

Field Options and Flags

Option/Flag	Description
Basic options	
Include in Full Text Index	<p>Select this option to include field data in the full-text index. This option enables searching of field content in Eclipse SE Desktop (using the quick search). To exclude the field from indexing, make sure the option is <i>not</i> selected.</p> <p>Note: Fields not relevant to full-text key word searching can be excluded from indexing to improve case maintenance (index rebuilding) and search efficiency. The Advanced Search can be used to search specific fields that are not included in the index.</p>
Use Spell Check	<p>Select this option to enable a standard spell-check function for the field in Record View in Eclipse SE Desktop.</p> <p>When this option is selected, misspelled words in the field are indicated with a red line while users are editing in Record View, as shown in this example.</p> 

Field Options and Flags (Continued)

Option/Flag	Description
Auto-Sort Contents	<p>For MULTI_VALUE fields only, select this option to sort the contents of the field. Consider a TO field containing multiple email addresses:</p> <p>Without option jsmith@myco.com; bbrown@myco.com; ahall@myco.com</p> <p>With option ahall@myco.com; bbrown@myco.com; jsmith@myco.com</p>
Flags	
None	No flags will be applied to the field.
Sort Key	<p>Select to allow Eclipse SE Desktop users to sort a field (its column) in the case table (Case View, Search Results, etc. tab). Typical sorting rules apply. Also allows:</p> <ul style="list-style-type: none"> • certain fields (such as DATE fields) to be searched, and • a column to be tallied. See the <i>Ipro Eclipse SE User Guide</i> for details on tallying a column. <p>Only the first 250 characters are considered for sorting/searching. (A “SortKey” index is used to facilitate searching and sorting. Only the first 250 characters of a field are included in the SortKey index, as compared with the Full Text index, which contains the entire field content).</p> <p>NOTE: DATE, DATE_TIME, and TIME fields are sortable whether or not the Sort Key flag is set.</p>
Primary Key (Sortable)	<p>Select to enable Sort Key features and also specify that the field will have unique values. This option is required for some system fields; other fields can be primary keys if values are unique. When a case is imported, primary-key fields are checked to ensure all values are unique; if a duplicate value is detected, an error is logged and the record is skipped.</p>
Category	<p>Select this option to enable Sort Key features for the field and also specify that the field can be selected for batch processes and specific queries. In addition, a control list can be included (discussed below).</p>
Additional options	
Use Pick List	<p>Select this option to enable a list for editing the field in Eclipse SE Desktop’s Record View or case table.</p> <p>Enter values manually in the List Values field, auto-generate them from existing field data, or import them from a text file (one item per line). Users may also add values in Eclipse SE Desktop if they have the needed privilege.</p> <p>The figure on the right shows an example in Record View—here, the FileType field has been defined with the Pick List option and part of the list is shown.</p> <p>Pick list values can be a maximum of 250 characters in length.</p> 

Field Options and Flags (Continued)

Option/Flag	Description
Use Control List	<p>If the Category flag is set, select this option if you want to define a specific set of values as part of the category definition.</p> <p>For example, if a Custodian field is defined with the Category flag and includes control list values of "Robert Smith," "Henry Brown," and "Mary Jones," only records with those names in the Custodian field will be imported. Note:</p> <ul style="list-style-type: none"> • Imported records that do not contain the specific control words in the corresponding fields will be ignored and import errors logged. (You have the opportunity to add undefined control list values during an import.) • If a control list is not used, then all records will be imported. • In addition, fields defined with the Control List option include a "pick list" in Eclipse SE Desktop (see "Use Pick List" above) to limit editing to the control list values. • Control list values can be a maximum of 250 characters in length.
Use Name List	<p>Select this option to enable a single pick list for use in multiple fields. A name list can be useful for users who are editing email fields such as To, CC/BCC, Reply To, or any fields for which the same set of values is needed.</p> <p>Add names to the list using the procedures described for pick lists.</p>
Default Field Access	
<p>This section allows you to define field-level security, either for a field in general or by group or user. Basic options are as follows. See "Set field-level security" on page 6-12 for full details.</p>	
Default Field Access	<p>Select the level of security for the field:</p> <ul style="list-style-type: none"> • Update: Allows field to be viewed and edited. • View Only: Allows field content to be seen but not edited. • Deny Access: Prevents field from being viewed or edited.
Security Restrictions by Group/ User	<p>Define field security based on specific groups and/or users.</p>

Create new fields

Complete the following steps to create new fields.

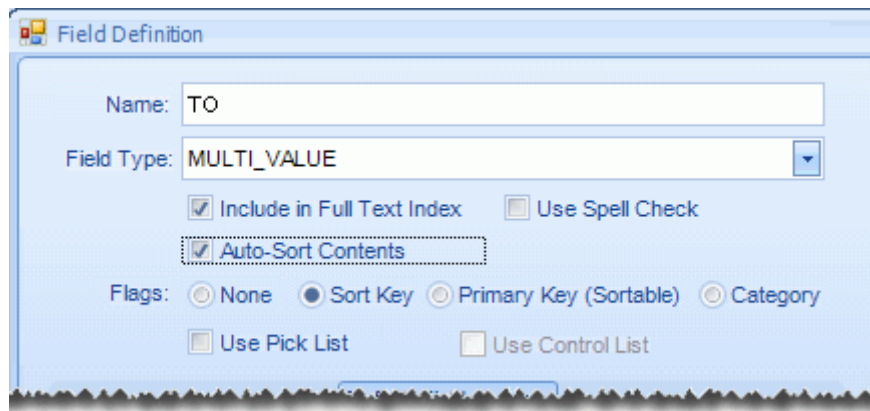
1. After completing "[Step 2: Loading a Case Definition](#)" on page 5-5, click the **Step 3. Define Database Fields** tab.
2. To prepare, read the field types described in "[About Eclipse SE database fields](#)" on page 5-12 and "[Field options and flags](#)" on page 5-18; refer to the information during this procedure as needed.
3. On the **Step 3** tab, click **New Field**.
4. **Field Name:** Replace the "New Field" text with an appropriate name.



NOTES:

- Do not begin and end a field name with parentheses. For example, do not name a field **(AUTHOR)**. Parentheses within a field name, such as **AUTHOR(S)**, can be used, however.
- Do not use "_DocID" as a field name; this name is reserved.

5. **Field Type:** Select the type of data that will populate this field.
6. **Options and Flags:** Select options and flags as described in "[Field options and flags](#)" on page 5-18. The following example shows a MULTI_VALUE field being defined.



7. Optional: Define field security. This step is often performed after a case is created. See "[Changing Field-level Security](#)" on page 6-11 for details.
8. Repeat these steps for other database fields to be created.

Note: Up to 500 fields can be defined.


9. Review the field definitions on the **Step 3** tab and make any changes needed. Note:

- Click  to edit field definition.



NOTE: Ensure required system fields are defined as needed; they are typically not edited (other than field name changes) after a case is created.

For other field types, editing limitations may exist after a case is created and/or data added. Limitations will be indicated in the Field Definition dialog box.

- Click  to delete a field. (Remember that system fields cannot be deleted.)

10. When field definitions are complete, continue with "[Step 4: Creating a Tag Palette](#)" on page [5-22](#).

Step 4: Creating a Tag Palette

The tag palette includes groups of tags that are to be applied to each document and/or page in your case. To ensure proper and efficient review processes within your organization, Eclipse SE Administration enables you to define tags, tag groups, and tagging rules.

Complete this section to define tags for your new case. Or, you can skip the **Step 4** tab and manage tags after the case is created.



NOTE: In Eclipse SE, tags can be applied at the document level and/or the individual page level. All tags that you define for a case can be used as document tags or page tags (depending on user privileges).

About Eclipse SE tags


As with many Eclipse SE tasks, proper planning will help ensure that the tags and tag groups you define meet your needs and include the needed rules and options.

- **Groups:** Consider the groups you will need, naming conventions, and which groups should have the rules explained in the following table.
- **Tags:** Give some thought to the tags that will be included in each group, as well as tag options (see page [5-24](#)) that apply.
- **Nested tags:** Understand the behavior of nested tags so that tags will be organized as intended. (See page [5-25](#).)

Group rules

The following table lists rules that can be applied to tag groups:

Tag Group Rules

Rule	If this rule is set, then...
Exclusive	Only one tag in the group can be applied to a document.
Required	At least one tag in the group must be applied to all documents in a batch before a batch can be marked complete.
Locked	Maintain the current state of tags in the group. That is, if a tag in the group has been applied to documents, it remains in this state. If a tag has not been applied to documents, it cannot be applied.
Require Child Tag	<p>This rule applies to groups with nested (multiple levels of) tags as shown in this example. If this rule is selected, users will not be able to apply a parent tag by itself. Parent tags will be applied only when the lowest level of child tag is applied.</p>  <p>In this example, the "Business Privilege" tag cannot be applied; it will automatically be applied when at least one of the third-level tags is applied.</p>
Tag Entire Family ^a	When a tag in the group is applied to a document, the tag will be applied to the selected document and its relatives (all generations of parents, children, siblings).

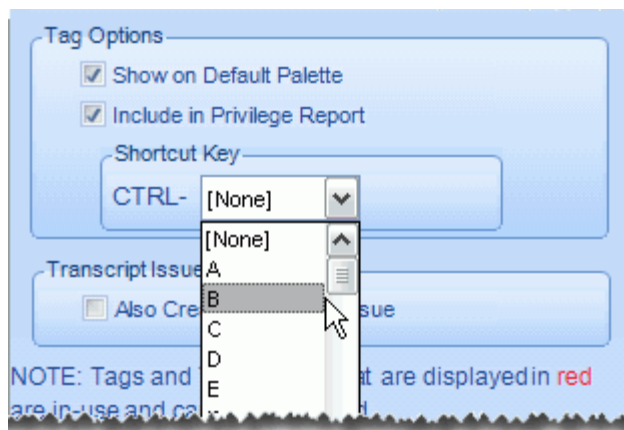
^a Document relationships are based on the use of a BEGATTACH field in the case. Document IDs fields defined with this type identify related documents. See "[About Eclipse SE database fields](#)" on page 5-12 for details on the BEGATTACH field type.

Tag options



The following table lists options that can be selected for each tag:

Tag Options

Option	Description
Show on Default Palette	<p>By default, all tags will appear on the case's tag palette Eclipse SE Desktop. If you clear this option for a tag, it will not appear on the palette and will not be available to users who have access to the associated case or review batch (unless they have the privilege to modify the tag palette).</p> <p>Users cannot apply tags that are not shown, nor can they search for or create a Smart Folder for such tags.</p>
Include in Privilege Report	<p>When a tag is defined with this option, it will be included in the Privilege report. See Chapter 15 for details about this report.</p>
Shortcut Key	<p>This option allows users to use keyboard shortcuts to apply public document or page tags. Shortcuts for tags begin with the Ctrl key.</p> <p>Define shortcuts for the lowest level of tags (that is, not parent tags or tag groups) using a letter (A-Z) or number (0-9). The figure above shows Ctrl+B being selected as the shortcut for a tag.</p> <p>For details on the use of keyboard shortcuts in Eclipse SE Desktop, see Chapter 6 of the <i>Eclipse SE User's Guide</i>.</p> <p style="text-align: right;"><i>Continued</i></p>

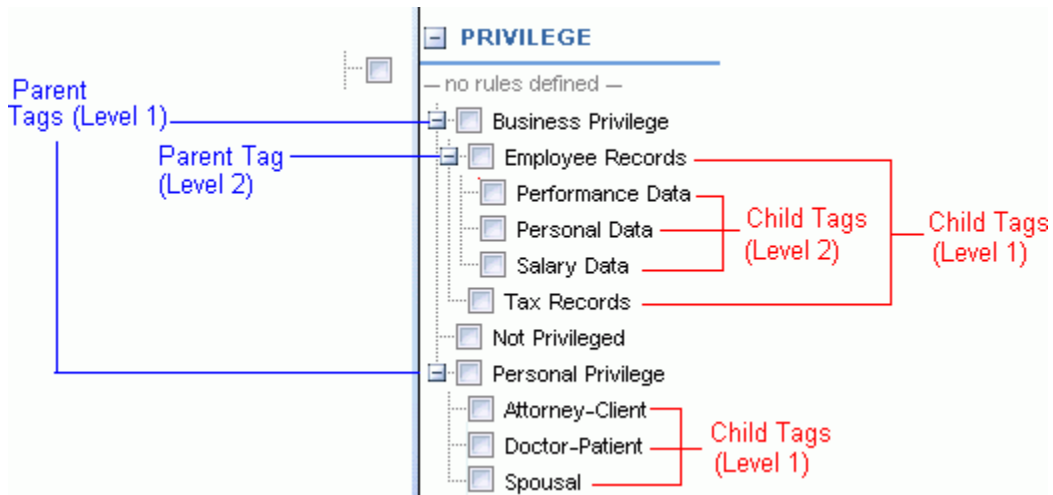


Tag Options (Continued)

Option	Description
Shortcut Key, <i>continued</i>	 <p>Notes:</p> <ul style="list-style-type: none"> • To avoid conflicts in behavior, avoid commonly used Windows shortcuts (for example, Ctrl+C or Ctrl+V). If these shortcuts are used for tags, the corresponding Windows shortcuts will be disabled in the Eclipse SE Desktop. • Eclipse SE Administration will notify you if you use the same shortcut key for more than one tag. Ensure duplicates do not exist. • To assist users, shortcut keys appear in the Doc and Page Tags tabs in Eclipse SE Desktop.
Also Create Transcript Issue	<p>Select this option to add document tags to the transcript issues palette (in addition to the case tag palette). When this option is selected, document tags are added as issue tags in the Case Management Transcripts tab and in Eclipse SE Desktop Transcript Annotations tab.</p>  <p>NOTE: After tags and issues are created, this option will not be checked; manage the transcript issues created as part of transcript management.</p>

Nested tags

“Nested” tags include primary (“parent”) tags and one or more subordinate (“child”) tags, as in the following example. Multiple levels of tags can exist, creating a “tree” of related tags.



Nested Tags Example

The behavior of nested tags is the same in Eclipse SE Desktop whether the tag is being applied to a single record or multiple records (including applying a tag to search results). Behavior differs a bit depending on whether or not the **Require Child Tag** rule has been set for the tag group containing the nested tags. (See "Group rules" on page 5-23.)

Notes:

- If the **Require Child Tag** rule *has not* been applied to the tag group, behavior will be as follows.
 - If a parent tag is applied, it alone is applied.
 - If a child tag is applied, the child tag and its parent tag(s) up the tree are applied.
 - If a parent tag is removed, any child tags (down the tree) that have been applied are also removed.
 - If a child tag is removed, the parent tag(s) (up the tree) will remain applied.
- If the **Require Child Tag** rule *has* been applied to the tag group, behavior will be as follows.
 - A parent tag cannot be applied by itself; it will automatically be applied when a child tag is applied (child tag at the lowest level of tags for any set of tags within the group).
 - If a child tag is applied, the child tag and its parent tag(s) up the tree are applied.

-
- If a parent tag is removed, any child tags (down the tree) that have been applied are also removed.
 - If a child tag is the only tag at its level, it cannot be removed; it will be removed automatically when its parent is removed.
 - If multiple child tags exist at a particular level and more than one of these tags is applied, then individual child tags in that level can be removed as long as at least one child tag is still applied.

Note that error messages will appear in the Eclipse SE Desktop status bar regarding application of tags when this rule is in effect.

Planning

Before you begin, give some thought to tag naming conventions, grouping, and organization. Ensure that reviewers will easily understand how to use the tags.

Define tags for a new case

The **Step 4. Create Tag Palette** tab allows you to create new tags and/or modify tags that have been added from an existing case or case definition (.CSE) file.

To define tags while creating a new case:

1. If you have not already done so, review ["About Eclipse SE tags"](#) on page 5-22.
2. In the Create Case workspace, click the **Step 4** tab. Continue with the following steps as required for your case.
3. To create new tags:
 - a. Click the **Create Tag Palette** button.
 - b. Click the **Create Group** button In the Modify Tag Palette dialog box.
 - c. In the Add Group dialog box, enter the name of each group to be created, one group name per line. Each name must be unique and no more than 60 characters long.
 - d. When all group names are entered, click **OK**.
 - e. For each new tag group, click a group name, then select the **Tag Group Rules** to be applied to the group. See ["Group rules"](#) on page 5-23 for details.
 - f. Next, select a tag group and click the **Create Tags** button.
 - g. In the Add Tags dialog box, enter the name of each tag to be created, one tag name per line. Each name must be unique and no more than 60 characters long.

- h. When all tag names are entered, click **OK**.
 - i. For each new tag, click a tag name, then select the **Tag Options** to be applied to the group. See "[Tag options](#)" on page 5-24 for details.
4. To create nested (child) tags:
 - a. If needed, review "[Nested tags](#)" on page 5-25 to understand the behavior of nested tags.
 - b. Click the **Create Tag Palette** button if needed.
 - c. Click a tag that will serve as a parent tag and click the **Create Tags** button.
 - d. Enter the name of each nested tag required, one name per line.
 - e. When all nested tags are entered, click **OK**.
 - f. Repeat steps c - e for any other tags requiring nested tags.
5. To modify tag groups or tags:
 - a. If needed, click the **Create Tag Palette** button; review details in the Modify Tag Palette dialog box.
 - b. Click a tag group or tag to be changed and make the needed changes. This includes changing group or tag names, changing tag group rules, or changing tag options.
 - c. Repeat step b for all changes.
6. To delete tag groups or tags:
 - a. If needed, click the **Create Tag Palette** button; review details in the Modify Tag Palette dialog box.
 - b. Click a tag group or tag to be deleted and click the appropriate **Delete** button. Note that the selected item will be deleted immediately.
 - c. Repeat step b for all tag groups and tags to be deleted.
7. When finished, click **OK** in the Modify Tag Palette dialog box.
8. Continue with "[Step 5: Create Redaction Palette](#)" on page 5-29.

Step 5: Create Redaction Palette

About Eclipse SE redactions

Up to 99 redaction categories can be defined.

Note:

- If you create a case from an existing case, the redactions defined for that case will be included in the new case.
- If you create a case using a .CSE file, you have the option to include the redactions defined in the .CSE file. If you do not include the redactions in the .CSE file, then the default redaction palette will be used for your new case.
- If you create a case based on a blank template, the default redaction palette will be used.

Complete this section to define redactions for your new case. Or, you can skip the **Step 5** tab and manage redactions after the case is created.

Planning

Before you begin, plan your redaction palette. Note:


- Redaction categories can be created with or without labels.
- Redaction and label font color can be selected.
- The order in which redactions are defined determines how they will be listed for selection in Eclipse SE Desktop, so redactions should be defined in the order of frequency of use. In particular, the first redaction defined will be the default selection in Eclipse SE Desktop; make sure it will be the most frequently used.

Identify the redaction categories you will need for the case, and give some thought to the labeling conventions as well as colors.

Define redactions for a new case

The **Step 5. Create Redaction Palette** tab allows you to create new redactions and/or modify redactions that have been added from an existing case or case definition (.CSE) file.



To define tags while creating a new case:



1. If you have not yet done so, review ["About Eclipse SE redactions"](#) on page 5-29.
2. In the Create Case workspace, click the **Step 5** tab. Continue with the following steps as required for your case.
3. To create new redactions:
 - a. Click the **Modify Redaction Palette** button.
 - b. In the Modify Tag Palette dialog box, click .
 - c. Complete the Add Redaction Label dialog box as described in the following table.

Redaction Definition

Item	Description
Label	Optional: Enter a name for the redaction. This name will appear on the redaction, and will be scaled to fit the size of the redaction applied by the user.
Font	To change the font, click the Font button and make changes in the Font dialog box. When finished, click OK . Note: because labels are resized when redactions are applied, the font size defined here is simply a baseline.
Redaction Colors	Evaluate selected colors in this example.

Redaction Definition (Continued)

Item	Description
Font Color and Redaction Color	<p>To change the font and/or redaction color, complete one of the following actions:</p> <ul style="list-style-type: none"> • Choose a basic color from the Font Color or Redaction Color list, or • Click the Font or Redaction Color button, , and complete the Color dialog box. <p> TIP: When a redaction category has no label and the redaction color matches the document background (for example, white on white), the redaction will cover data but will not indicate that a redaction exists.</p>
Description	Optional: Enter notes or details about this redaction.

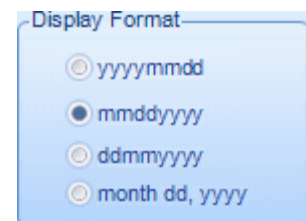
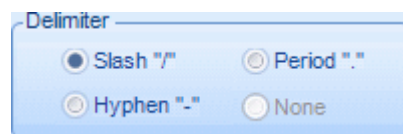
- d. Repeat steps b - c for all new redactions.
4. To modify redactions:
 - a. If needed, click the **Modify Redaction Palette** button; review the redactions in the Modify Redaction Palette dialog box.
 - b. Click a redaction to be changed, then click  and make the needed changes. This includes changing the label, font, colors, or description.
 - c. Repeat step b for all changes.
5. To delete redactions:
 - a. If needed, click the **Modify Redaction Palette** button; review details in the Modify Tag Palette dialog box.
 - b. Click a redaction to be deleted and click . Note that the selected redaction will be deleted immediately.
 - c. Repeat step b for all redactions to be deleted.
6. When finished, click **OK** in the Add or Modify Redaction Palette dialog box.
7. Continue with "[Step 6: Select Case Options](#)" on page 5-32.

Step 6: Select Case Options

Case options allow you to define tagging, history/tracking, and date format details. Default selections exist for all options. If the default selections are not correct for your case make changes as follows.

1. After completing "[Step 5: Create Redaction Palette](#)" on page 5-29, click the **Step 6. Select Case Options** tab.
2. In the **Tagging Options** group, select the needed tagging option:
 - **Limit tags to document level:** A reviewer will be able to tag documents but not individual pages of a multi-page document.
 - **Limit tags to page level:** A reviewer must tag each page of a multi-page document.
 - **Allow tagging at either document or page level:** A reviewer can decide whether to tag a document or individual pages of a multi-page document.
3. In the **History/Tracking Options** group, select or clear the actions to be recorded for reporting purposes. Each selected action will be recorded in the Eclipse SE database and details will be presented in one of the reports explained in [Chapter 15](#).
4. In the **Date Format Options** group, select the format for DATE and/or DATE_TIME fields (see "[User-defined fields](#)" on page 5-12). These selections specify how dates will display in the Eclipse SE Desktop (after data is imported and/or a reviewer edits a date field).

- a. **Display Format:** select the order of date components as shown in the figure on the right. Day = dd, month = mm, and year = yyyy.
- b. **Delimiter:** Select the separator for date components as shown in the following figure.



- c. **Zero Fill:** Select the manner in which partial or empty date fields are handled, as shown in the following figure.

Add 0 (zero) or 9 (nine) for missing components. For example, if a load file includes May 2012, with this option selected, the day will be represented as 00 or 99, depending on the "Use Nine" option. See examples below.

Zero Fill

Do NOT Allow Partial Dates

Fill Empty Dates

Use Nine to Fill Dates

Add a date of all zeros or all nines (depending on the following option) to empty date fields.

Use 9s (nines) for missing dates or date components. See examples below.

Zero Fill Options

For examples of the different date options, see ["Date format examples"](#) on page 5-34.

5. To require validation of the load file data that you will import after the case is created, select the **Require Validation of Load Files** option. When this option is selected, a warning will display during the import process if any errors exist in the load file (for example, missing images).
6. **Native Time Zone:** This setting controls the time used during date and time formatting. It controls how header date and time values display for emails in the **Quick View** tab, and also controls the date and time for TIFF images generated from the **Quick View** tab (TIFF-on-the-Fly). The default setting is **(UTC) Coordinated Universal Time** (0 offset).

In Eclipse SE Desktop, this setting will not affect or modify dates and times stored as text or in the metadata fields associated with the displayed values. Thus, the values in the native files may differ from those in the **Quick View** tab (or TIFF-on the-Fly images).



NOTE: An offset may also be defined in Ipro eCapture. If your case documents will come from eCapture, you may want to check with the eCapture administrator and use the same time zone.

To modify the native time zone:

- a. Click .
- b. Select the needed time zone and click **OK**.

7. Stop words are automatically enabled for any newly created case. To make it so that these terms can be searched as well, select the **Disable use of Stop Word List** option. For more information regarding stop words, see ["Working with Stop Words"](#) on page 6-23.
8. When finished, continue with ["Step 7: Finish Case Creation"](#) on page 5-34.

Date format examples

The following table shows examples of the different formats for partial and empty dates:

Date in Load File ^a	Selected Options			Date will display as...
	Date Format	Delim.	Zero Fill	
May 2012	yyyymmdd	/	(no option selected)	2012/05
		.	Do NOT Allow Partial...	2012.05.00
	month dd, yyyy	<i>na</i>	<ul style="list-style-type: none"> • Do NOT Allow Partial... • Use Nine to Fill... 	May 99, 2012
Empty date field	ddmmyyyy	-	Fill Empty Dates	00-00-0000
	mmddyyyy	None	<ul style="list-style-type: none"> • Fill Empty Dates • Use Nine to Fill... 	99999999
	month dd, yyyy	<i>na</i>	Do NOT Allow Partial...	Unknown 00, 0000

a Or entered by reviewer in a coding form or the case table.

Step 7: Finish Case Creation

When all steps have been completed, Eclipse SE Administration checks your entries and presents a summary on the **Step 7. Finish** tab. Complete the following procedures as required before you create your new case.

Review and correct required case details

1. In the Create Case workspace, click the **Step 7** tab.
2. Review the basic details of your new case. Required information that is missing or incorrectly defined is identified with a red label. Note:

-
- The client name, unique case name, and data directory are required and selected on the **Step 1** tab.
 - On the **Step 3** tab, one field must be defined with a type of BEGDOC. (Undefined system fields will be added by default if not selected; additional fields may be any other type.)
 - Other aspects of the case can be defined later as explained in "[Managing Database Fields](#)" on page 6-9.
3. If information is missing or incorrect, return to the appropriate tab and make needed corrections.
 4. Eclipse SE includes 128 default stop words. The stop words for your case can be defined now or after the case is created.

To review and define stop words now, see "[Working with Stop Words](#)" on page 6-23 and then return to this procedure.

5. If known at this time, assign a Case Administrator(s) by clicking **Assign Case Admin** and selecting the user(s) to act in this role for the case being created.



NOTE: The user(s) you select can have any "base" role and privileges. When Case Administrators are defined as part of case creation, they will be given a case/user role of Case Administrator. See "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13 for details about a role/privileges assigned in conjunction with a case.

6. When all case details shown on this tab are correct, click **Create Case** and wait as Eclipse SE establishes the case.
7. When a confirmation message displays, click **OK**. The new case is created.
8. Continue with additional activities to complete your case, as described in "[Next Steps](#)" on page 5-70.

Creating a Case from an Existing Case

If you need to create a new case that is identical (or nearly so) to an existing case, you can efficiently use an existing case or a .CSE file. Optionally, you can import a .DLF file and copy image and native files for the new case at the same time.




NOTE: If you need to review or make significant changes to the case definition (fields, tags, etc.), follow the instructions in "[Creating a New Case](#)" on page 5-4 so that you can create the case from an existing case or .CSE file and review/make changes at the same time.



To create a case from an existing one:

1. Preparation:
 - a. In Eclipse SE Administration, make sure the existing case index(es) are up to date. If the case has changed since its indexes were last built, the index may not be included with the new case. See "[Index Maintenance](#)" on page 7-5 for details on rebuilding indexes.
 - b. Deleted fields in your existing case will not be transferred to the new case. (If you want to include deleted fields in the new case, change the field type from DELETED to another type before you create the new case.)
2. In the navigation panel, expand the **Client/Case Management** menu and click **Create Case (from Existing)**.
3. Define the case as described in the following table.



Create Case (from Existing) Options

Item	Description
New Case Name	Enter a name for the case. This name must be unique and cannot include certain special characters. If a character is not allowed, the field will turn red. The hyphen, underscore, and parentheses are among the characters allowed. Maximum length is 60 characters.  NOTE: The maximum length for a fully qualified file name, which includes the case name and database directory path, is 260 characters (<248 characters for the path). Ensure that the case name and path do not exceed this maximum.

Create Case (from Existing) Options (Continued)

Item	Description
Matter	Optional: If needed, enter a case matter number of up to 100 characters.
Case definition Option 1	<p>Select one of the following options:</p> <p>Copy from an existing case - select this option, plus the needed client and case, to copy the definition of the selected case.</p> <p>All aspects of the existing case will be used for the new case (all fields, tags, etc.).</p>
Option 2	<p>Load from a case definition file - select this option to use a case definition (.CSE) file. All aspects of a case that are included in the .CSE file will be included in your new case (user-defined fields^a, tags, etc. as described in "Exporting a Case Definition File" on page 6-6).</p> <p>To complete this selection:</p> <ol style="list-style-type: none"> 1. Enter the complete path and filename for the .CSE file to be used or click  to navigate to and select the file. 2. Select the client for which this case is being created.
Case Database Directory	<p>This entry is optional unless a required systemwide data directory is defined as explained in "Configuring System Level Options" on page 2-9. When it is optional, if no entry is made, the Data directory will be placed in the system directory identified when you first logged in (see page 2-2) or the location specified in System Settings.</p> <p>When allowed, define a different location by entering (or navigating to with the  button) a location where Eclipse SE will place database-specific files and other files required for the case. A case-specific folder will be created here for each case.</p> <p>The location must be a mapped drive or UNC path. See also "New Case Name" note above.</p>

Create Case (from Existing) Options (Continued)

Item	Description
Optional .DLF Import File	<p>If desired, import data from a .DLF file as part of the new case creation. To do so, enter the complete path and filename for the .DLF file to be used or click  to navigate to and select the file.</p> <p> IMPORTANT! The fields defined in the .DLF file must match exactly the fields defined by the existing case or .CSE file.</p>
Copy Images and Native Files to Case Directory	<p>If you want to copy the case images and native files as part of the new case creation, select this option.</p>

- a System fields (BEGDOC, FILE_EXT, etc.) are not included in a .CSE file; they are created automatically when a new case is created using the file.
 - 4. When the definition is complete, click **Create**. Wait as the new case is created.
 - 5. Click **OK** in response to the success message.

Migrating Cases from LexisNexis Concordance

Overview

Eclipse SE allows administrators to import data and associated files directly from LexisNexis Concordance eDiscovery management software into new or existing Eclipse SE cases.

This section explains how to migrate a case from Concordance to Eclipse SE.

What is required?

To import cases from Concordance directly into Eclipse SE, the following conditions must exist:

- Concordance 8.x or later must be installed and you must hold a valid license for it.
- Ipro Eclipse SE must be installed and authorized for use.

The procedures in this section assume you are familiar with Concordance and your existing cases.

What can be migrated?

The following content can be migrated from Concordance .DCB files¹⁰:

- Database fields
- Applied tags
- Applied redaction categories
- Issue tags and/or notes
- Images: If using Concordance Image, the migration will convert your image base, including annotations such as redactions. The following annotations are *not* converted:
 - Hollow Box
 - Solid Ellipse
 - Hollow Ellipse
 - Line

In addition to migrating the case, Eclipse SE Administration makes it easy to evaluate and change the Concordance case definition as part of the case migration. Thus the efficiency of migration is combined with the ease of customizing the case to meet your needs.

10. If you have Concordance .DAT files, refer to [Chapter 8](#) for details on importing the data. If you have Concordance .CAT files, migrate each file comprising the .CAT file individually into the same Eclipse SE case.

Step 1: Setting Up the Migration



CAUTION: You cannot save a portion of a case migration (such as your entries for steps 1 and 2). If you exit Eclipse SE Administration before completing all four steps, you will lose your work.


Preparation

Familiarize yourself with the Concordance database and review "[About Eclipse SE database fields](#)" on page 5-12 to determine how you want to import and map the Concordance data.

If importing into an existing Eclipse SE case, back up the case before you begin. See "[Backing Up/Archiving and Restoring Case Data](#)" on page 7-8 for details. Also, review the Eclipse SE case and determine whether you will be overwriting existing data and/or adding new data.

Define basic information

Complete the following steps to begin the migration process:

1. In Eclipse SE Administration, expand the **Client/Case Management** menu in the Eclipse SE navigation panel and click **Migrate Case from Concordance**.
2. Click the **Step 1. Setup Migration** tab.
3. **Select Concordance Database:** Enter the full path for the Concordance database (.DCB file). Alternatively, click  and navigate to/select the Concordance database (.DCB file), then click **Open**.





NOTE: Concatenated databases (.CAT files) should not be migrated. However, you can migrate individual .DCB files and/or import individual .DAT files for the databases comprising a .CAT file into one Eclipse SE case.


4. Go to the next step if you are importing into an existing case or skip to [step 6](#) if you are creating a new case.
5. To import into an existing case:
 - a. Click **Select** in the **Import into an Existing Case** area.
 - b. Select the needed client and case.
 - c. Review the field details on the right side of the **Step 1** tab.
 - d. Continue with "[Step 2: Mapping Fields](#)" on page 5-45.

6. To create a new case, click **Select** in the **Create a New Case** area and add the following details.




Concordance Migration: Basic New-Case Details


Item	Description
Client ID	Select the client whose case is being defined. If the client is not listed, add it as explained in Chapter 4 , then return to case migration.
Case Name	<p>Enter a name for the case. This name must be unique and cannot include certain special characters. If a character is not allowed, you will be notified.</p> <p>The hyphen, underscore, and parentheses are among the characters allowed. Maximum length is 60 characters.</p> <p> NOTE: The maximum length for a fully qualified file name, which includes the case name and data directory path, is 260 characters (<248 characters for the path). Ensure that the case name and path do not exceed this maximum.</p>
Matter Number	Optional: Enter a case matter number of up to 100 characters.
Data Directory	<p>Enter the full (UNC) path and folder to contain all case data files. Alternatively, click  and navigate to/select the folder, then click OK.</p> <p>See also Case Name note above.</p>

Concordance Migration: Basic New-Case Details (Continued)

Item	Description
Native Time Zone Offset	<p>Optional: This setting controls the offset to Greenwich Mean Time (GMT) that is applied during date and time formatting. The default setting is GMT (0 offset). This setting can be made after the case is created if preferred.</p> <p>In Eclipse SE Desktop, this offset controls how header date and time values display for emails in the Quick View tab. It also controls the date and time for TIFF images generated from the Quick View tab (TIFF-on-the-Fly).</p> <p>This setting will not affect or modify dates and times stored as text or in the metadata fields associated with the displayed values. Thus, the values in the native files may differ from those in the Quick View tab (or TIFF-on-the-Fly images).</p> <p>To modify the native time zone offset:</p> <ol style="list-style-type: none"> 1. Click . 2. Select the needed time zone offset and click OK.

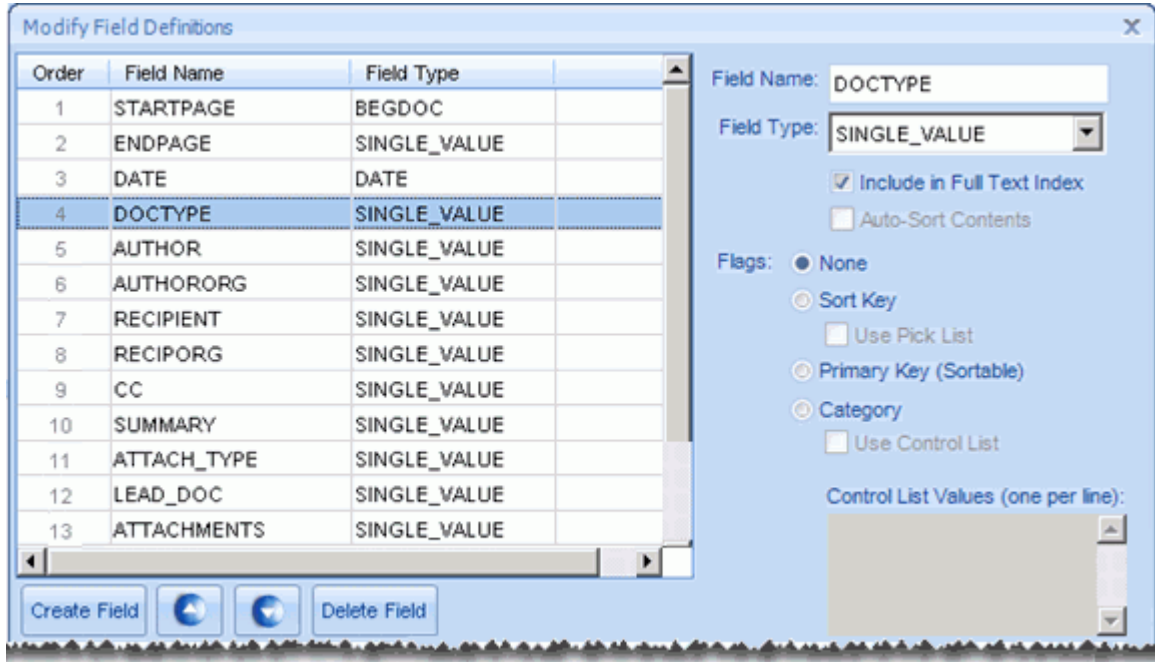
7. When creating a new case, complete the following steps to ensure the fields for the new case or load files are defined as needed:
 - a. Review all field details in the right pane of the **Step 1** tab. (You may need to maximize the window and/or scroll to see all fields and columns.) The following figure shows an example; note that you can sort any column by clicking the column heading.

Concordance Field	Sample Data	Eclipse SE Field	Field Type	Edit
STARTPAGE	00010002	STARTPAGE	BEGDOC	
ENDPAGE	00010002	ENDPAGE	SINGLE_VALUE	
DATE	00000000	DATE	DATE	

- b. Edit, create, and/or delete a field for the Eclipse SE case by clicking its  button in the rightmost column and making needed changes. See the following figure and table, as well as ["About Eclipse SE database fields"](#) on page 5-12.


- c. Make changes for other fields while the dialog box is open.
- d. When finished, click **OK**.

NOTE: Field changes can also be made after the case is migrated.




Editing Fields

Concordance Migration: Field Considerations

Item	Consideration
Image key	The image key field in the Concordance database will be automatically detected. Do not change this field's type on the Step 1 tab. Make other changes if needed (such as field name).
OCR text	To include the Concordance OCR text, ensure that an EXTRACTEDTEXT field is included.
Field names	By default, field names for new cases or load files will match those of the Concordance case.  NOTE: If you change a field name so that it does not match the Concordance name, you will need to manually map the field in the following step.

Concordance Migration: Field Considerations (Continued)

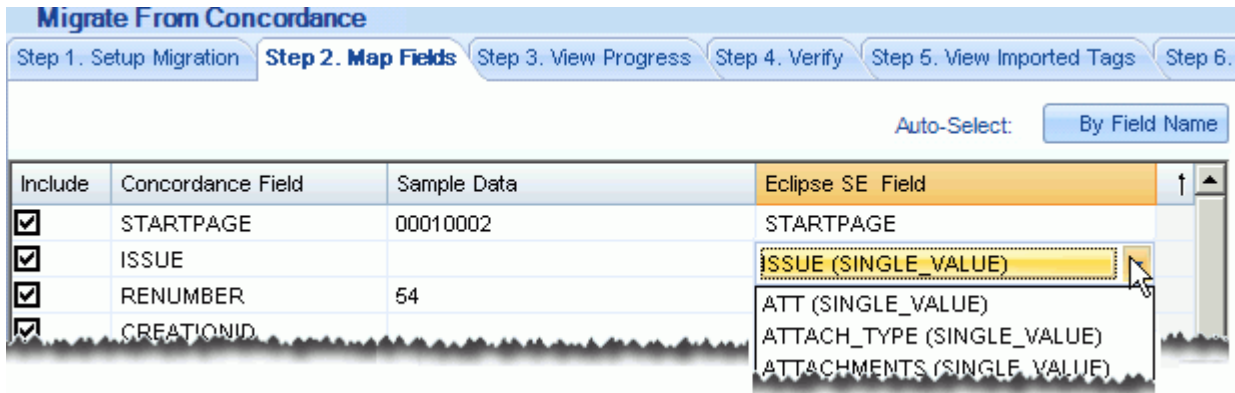
Item	Consideration
Concatenated fields	If you will be concatenating fields (mapping two or more fields into one Eclipse SE field), ensure that those fields are of the same type.
Field position	<p>The <i>default field position</i> is the default order in which fields will appear on the Step 2 tab, as well as locations such as Eclipse SE Administration's Case Management > Database Fields tab and in Eclipse SE Desktop Case View or related tab.</p> <p>To change the field position in the Modify Field Definitions dialog box, ensure that the field table is in ascending order by the Order column, then select a field to be moved and click the Up or Down button until the field is in the needed position.</p> 

8. When finished, continue with "[Step 2: Mapping Fields](#)" on page [5-45](#).

Step 2: Mapping Fields

Match the data fields defined in your Concordance case to the fields defined for the case in Eclipse SE Administration.

The following example shows the **Step 2** tab in which the administrator is mapping an Eclipse SE field to the Concordance ISSUE field.



Notes:

- If you are creating a new case, fields are “mapped” in order to create them. Only the fields you map, plus required Eclipse SE system fields, will be created in your new case.
- As a minimum, the Concordance image key field (for example, BEGNO) must be mapped to the Eclipse SE BEGDOC field.



NOTE: If the BEGDOC field is incorrectly mapped, your case will be migrated, but the data will be invalid and subsequent problems will occur.

- To include the Concordance OCR, make sure that field is mapped to the Eclipse SE EXTRACTEDTEXT field.
- More than one field in the Concordance database can be mapped to a single field in the case, providing the file type is the same. For example, the Concordance database may have two fields to define an author’s name (First Name, Last Name). In the Eclipse SE case, a single field might be preferred for this information (Name).
- Eclipse SE required system fields (BEGATTACH, ENDATTACH, ENDDOC, EXTRACTEDTEXT, FILE_EXT, FILE_ID, IMAGECNT, MD5_HASH, NATIVE, NATIVE_SIZE, TEXT_SIZE) will be created for the new case whether or not they are mapped.

Complete one of the following procedures to match fields for document data.

Auto-select fields

Eclipse SE Administration can match the fields based on the field name. For example, if the Concordance case contains a field called IMGKEY and the case contains a field named IMGKEY, they will be automatically matched as follows.

To auto-select fields:

1. If you want to match by field name, ensure that your Concordance case includes field names in the header. In the migration workspace, click the **Step 2. Map Fields** tab.
2. Click the **Auto-Select By Field Name** button.
3. Evaluate the matching to determine if:
 - the auto-matching does not meet your needs,
 - some fields are not matched, and/or
 - some fields should not be included.
4. For fields that should not be included, clear the **Include** option.
5. For other mapping problems, continue with "[Manually match fields](#)," next.
6. When all fields to be included are mapped, continue with "[Step 2: Select tag, issue, and other options](#)" on page 5-47.

Manually match fields

Complete the following steps to manually match the fields that have not been mapped or for which mapping needs to be corrected.



NOTE: To map a field, click in the corresponding **Eclipse SE Field** column and select the needed field. (Clicking the **Include** option alone is not sufficient.)

1. After or instead of auto-mapping fields, evaluate the field information on the **Step 2. Map Fields** tab to determine which fields need to be mapped.
2. For a field that is not mapped or is incorrectly mapped:
 - a. Click in the corresponding Eclipse SE Field area. (It may be blank, contain a field name, or the word "Select.")
 - b. Click and choose the needed field.

The list shows the Eclipse SE field names and types to assist you with matching. Matching a field automatically selects the **Include** option for you.

3. If you map two or more fields to the same Eclipse SE field (concatenate them), the fields will be highlighted. If this is correct, select a **Merged Field Delimiter** (or none) as described on page 5-48. When selected, a delimiter will be included in the merged data to identify the original field delineation(s).
4. Repeat steps 2 and 3 for all fields to be mapped.
5. When finished, continue with "[Step 2: Select tag, issue, and other options](#)," next.

Step 2: Select tag, issue, and other options

After completing "[Step 2: Mapping Fields](#)" on page 5-45, make selections on the bottom of the **Step 2** tab, based on the content of the Concordance case and needs of the Eclipse SE case:

1. **Tag Options:** If the Concordance file being migrated includes tag data, select from one of the following options:
 - **Exclude All Tags:** Select this option to ignore all tags in the Concordance case. The migrated case will include no tags.
 - **Ignore Private Tags:** Select this option to *not* import any private tags in the Concordance case. If this option is not selected, Concordance private tags will become Eclipse SE public tags.
 - **Make Root Level Tag Groups:** Select this option to import tags into a tag group named for the first level of a set of nested Concordance tags. If this option is not selected, tags will be imported to the group "Imported Tags."
2. **Issue Tags:** If a) you did not exclude tags in [step 1](#), b) the Concordance file being migrated includes issue tags, and c) you want to import them, select the **Include Issue Tags** option. In addition, select one of the following options:
 - **Include in Same Group as Doc Tags:** Select this option to include issue tags in tag groups defined for the case.
 - **Create Issue Tag Group:** Select this option to create a new group specifically for issue tags.

3. **Issue Notes:** If the Concordance file being migrated includes issue notes and you want to import them, select the **Include Issue Notes** option. In addition, select one of the following options:
 - **Import into Field:** Select the field into which the notes will be imported.
 - **Create New Field:** Enter a name for a new field into which the notes will be imported.
4. **Options:** Select additional options as described in the following table.

Concordance Migration: Field and Date Options

Option	Description
Merged Field Delimiter	<p>If you concatenated fields during field mapping, select a delimiter to separate the merged field data:</p> <ul style="list-style-type: none"> • If a delimiter is not needed, select (none) skip to the Date Format selection. • To use a semicolon as the delimiter, select ; and skip to the Date Format selection. • To use a different delimiter, select Custom and continue with the following steps. • In the Create Custom Delimiter dialog box, click the Characters or ASCII Values option, depending on how you will specify the delimiter character(s). <ol style="list-style-type: none"> a. If you select Characters, enter the character(s) in the top field under the Characters option. Separate more than one character with a space. The ASCII value for each character appears in the bottom field. b. If you select ASCII Values, enter the ASCII value(s) for the needed character(s) in the top field under the ASCII Values option. Separate more than one value with a space. The character corresponding to each value appears in the bottom field. c. When finished, click OK.

Concordance Migration: Field and Date Options

Option	Description
Date Format	<p>Select the date format that most closely matches the dates in your Concordance case. For example, if your case includes dates in the format of dd-mm-yyyy, select the D/M/Y option. Dates to be migrated must be in a common date format. (For example, 27-09-2009 or 27 Sept 2009.)</p> <p>Consider the following information regarding partial dates (for example, 09-2009):</p> <ul style="list-style-type: none"> • If you are migrating into an existing case and want to include partial dates, ensure the Date Format Options for the case are set as needed; see "Step 6: Select Case Options" on page 5-32 for details. • If you are creating a new case, dates will be migrated in whatever form they exist in the Concordance database; date options can be defined for the case afterward.

5. When all options are selected, go to "[Step 3: Finishing the Migration](#)" on page 5-49.

Step 3: Finishing the Migration

This procedure "introduces" Eclipse SE to your Concordance database and imports the database into Eclipse SE.

1. If the migration **Step 2** tab is not the active tab, click the tab.
2. Click **Import Records**.
3. Watch migration progress on the **Step 3. View Progress** tab.
4. Continue with "[Step 4: Verifying the Migration](#)" on page 5-50.

Step 4: Verifying the Migration

Once data is migrated into Eclipse SE, complete these steps to view and verify record details:

1. In the migration workspace, click the **Step 4. Verify** tab.
2. Evaluate records as explained in [Chapter 11](#). Possible activities include:
 - Reviewing the **Documents** list and document/page details
 - Deleting a document or page
 - Checking/changing image (or native) file path
 - Viewing images
 - Correcting the path for the case images



NOTE: If the Concordance image path did not include a hard drive or UNC drive, Eclipse SE precedes the path with the volume name "CONCORD1." Correct the path for this volume in the **Volume Information** area of this tab.

3. When finished, continue with "[Step 5: Viewing Imported Tags](#)" on page [5-51](#).



TIP: Reports that can help you evaluate the imported records are available in Case Management. See "[Working with Reports](#)" on page [15-1](#) for details.

Step 5: Viewing Imported Tags

By default, Eclipse SE includes no tags. If tags were included in your migration, complete the following steps:

1. In the migration workspace, click the **Step 5** tab.
2. Review the migrated tags and take one of the following actions:
 - To make changes now, click the **Modify Tag Palette** button and add, modify, or delete tags as needed. For details, see "[Step 4: Creating a Tag Palette](#)" on page 5-22.
 - To make changes later, when you are finished reviewing the tags, go to the next step. (When you are ready to make changes, see [Chapter 6](#).)
3. Continue with the next procedure.

Step 6: Viewing Imported Redaction Categories

If redactions were included in your migration, complete the following steps:

1. In the migration workspace, click the **Step 6** tab.
2. Review the migrated redactions and take one of the following actions:
 - To make changes now, click the **Modify Redactions** button and add, modify, or delete redactions as needed. For details, see "[Step 5: Create Redaction Palette](#)" on page 5-29.
 - To make changes later, when you are finished reviewing the redactions, go to the next step. (When you are ready to make changes, see [Chapter 6](#).)
3. Continue with additional activities to complete your case, as described in "[Next Steps](#)" on page 5-70.

Migrating Cases from AD Summation

Overview

Eclipse SE offers an optional module that allows Eclipse SE administrators to import data and associated files directly from AccessData Summation cases (singly or in a batch) into new or existing Eclipse SE cases. This module also allows you to create basic load files (.DLF and .CSE) from an AD Summation iBlaze case without affecting Eclipse SE cases.

In addition to migrating the case, Eclipse SE Administration makes it easy to evaluate and change the Summation case definition as part of the case migration. Thus the efficiency of migration is combined with the ease of customizing the case to meet your needs.

This section explains how to migrate one or more cases from Summation to Eclipse SE. Changing a case after it is migrated is covered in [Chapter 6](#).

What is required?

To import cases from AD Summation directly into Eclipse SE (or create load files), the following conditions must exist:

- AD Summation (iBlaze 3.0 or 3.1) must be installed and you must hold a valid license for it.
- Ipro Eclipse SE 2016.3.1 or later must be installed and you must have a license for both it and the Eclipse SE Summation Migration Module.
- Your site must use remote authorization for Eclipse SE and the Summation Migration Module. See the *Eclipse SE Installation Guide* for details on authorization.

The procedures in this section assume you are familiar with Summation and your existing cases.

What can be migrated?

With certain limitations, the following content can be migrated from Summation:

- Database fields
- Applied issues (tags)
- Image files and applied annotations
- Native files
- Applied redaction reasons (become redaction categories in Eclipse SE)
- Transcripts and applied annotations

Migration limitations

The following items are not supported for this release:

- The following AD Summation tools (for organizing and accessing case documents and related items) are not supported in Eclipse SE:
 - Briefcases
 - Document Collections
 - Production Sets
- Stamp (multi-stamp tool) annotations are not migrated. Links may appear as rectangles in Eclipse SE.
- Redaction colors are not migrated (all redactions will be black until you assign colors after the migration is completed).
- Summation's issues are migrated as tags in Eclipse SE; however, issue colors are not supported.
- Some colors and/or shapes may be slightly different than they are in Summation.
- Lookup tables other than the Summation issue table are not migrated.
- If the Summation document set includes emails stored in a container file such as a Lotus .NSF file, the migration will not create the emails as individual files. (Only Microsoft's .PST files are processed as individual email files.)
- Transcripts: The following links are not supported in Eclipse SE:
 - Transcript-to-transcript links
 - Web/research links
 - Advanced (script) links

Migrating a Single Case



CAUTION: You cannot save a portion of a case migration (such as your entries for steps 1 and 2). If you exit Eclipse SE Administration before completing all four steps, you will lose your work.

Step 1: Set up the migration

Preparation

Familiarize yourself with the Summation case(s) and review "[About Eclipse SE database fields](#)" on page 5-12 to determine how you want to import and map the Summation data.

If importing into an existing Eclipse SE case, back up the case before you begin. See "[Backing Up/Archiving and Restoring Case Data](#)" on page 7-8 for details. Also, review the Eclipse SE case and determine whether you will be overwriting existing data and/or adding (appending) new data.

Define basic information

Complete the following steps to begin the migration process:

1. In Eclipse SE Administration, expand the **Client/Case Management** menu in the Eclipse SE navigation panel and click **Migrate Case from Summation**. Eclipse SE will start Summation. (If Summation is already open, it will be restarted.)¹¹




IMPORTANT: To ensure a successful migration, do not close Summation while Eclipse SE is migrating a case. If Summation is closed, Eclipse SE will reopen it, but errors may result.

2. Click the **Step 1. Setup Migration** tab.
3. **Select Summation Database:** Select the database (case) to be migrated.


11. Eclipse SE queries the registry to find the location of the Summation program. If Summation has been installed on a network server (not locally), Eclipse SE may not be able to start it properly. In this case, you will need to start Summation manually in order to continue with this procedure.

4. Continue with one of the following steps:
 - Create a new case from the Summation case: [step 5](#).
 - Import the Summation case into an existing case in Eclipse SE: [step 6](#).
 - Create load files only (.DLF and .CSE files), without affecting cases in Eclipse SE: [step 7](#).
5. To create a new case:
 - a. Click **Select** in the **Create a New Case** area and select/add the details in the following table.
 - b. When finished, skip to [step 8](#).

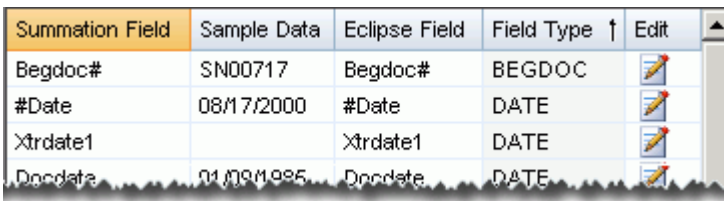
Summation Migration: Basic New-Case Details

Item	Description
Client ID	Select the client whose case is being defined. If the client is not listed, add it as explained in Chapter 4 , then return to case migration.
Case Name	Accept the default case name (the Summation case name) or enter a name for the case. This name must be unique and cannot include certain special characters. If a character is not allowed, the name will turn red. The hyphen, underscore, and parentheses are among the characters allowed. Maximum length is 60 characters.
Matter Number	Optional: Enter a case matter number of up to 100 characters.
Data Directory	Click  and navigate to the data folder in the Browse For Folder dialog box (or make a new folder in that dialog box). This is the path to the folder containing all case data files.


Summation Migration: Basic New-Case Details

Item	Description
<p>Native Time Zone Offset</p>	<p>Optional: This setting controls the offset to Greenwich Mean Time (GMT) that is applied during date and time formatting. The default setting is GMT (0 offset). This setting can be made after the case is created if preferred.</p> <p>In Eclipse SE Desktop, this offset controls how header date and time values display for emails in the Quick View tab. It also controls the date and time for TIFF images generated from the Quick View tab (TIFF-on-the-Fly).</p> <p>This setting will not affect or modify dates and times stored as text or in the metadata fields associated with the displayed values. Thus, the values in the native files may differ from those in the Quick View tab (or TIFF-on-the-Fly images).</p> <p>To modify the native time zone offset:</p> <ol style="list-style-type: none"> 1. Click . 2. Select the needed time zone offset and click OK.

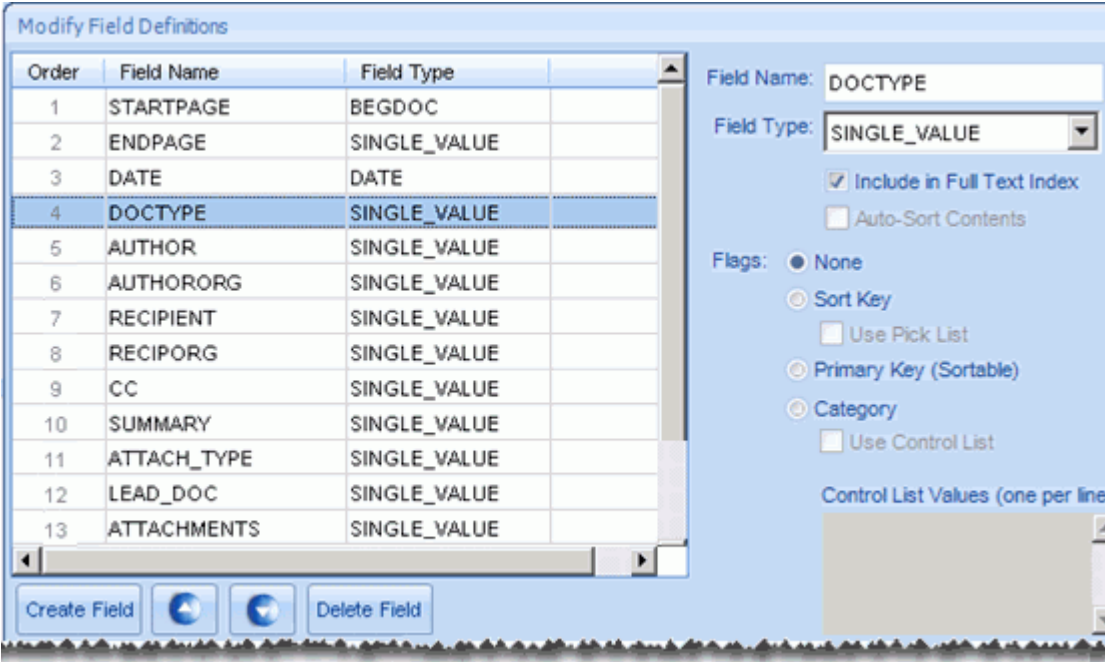
6. To import into an existing case:
 - a. Click **Select** in the **Import into an Existing Case** area.
 - b. Select the needed client and case.
 - c. Review the field details on the right side of the **Step 1** tab.
 - d. Continue with "[Step 2: Map fields](#)" on page [5-59](#).
7. To create load files only: Click **Select** in the **Create Load Files Only** area; go to [step 8](#).
8. When creating a new case or load files only, complete the following steps to ensure the fields for the new case or load files are defined as needed:
 - a. Review all field details in the right pane of the **Step 1** tab. (You may need to maximize the window and/or scroll to see all fields and columns.) The figure here shows an example; note that you can sort on any column by clicking the column heading.



Summation Field	Sample Data	Eclipse Field	Field Type	Edit
Begdoc#	SN00717	Begdoc#	BEGDOC	
#Date	08/17/2000	#Date	DATE	
Xtrdate1		Xtrdate1	DATE	
Docdate	01/09/1995	Docdate	DATE	

- b. Edit, create, and/or delete a field for the Eclipse SE case/load file by clicking its  button in the rightmost column and making needed changes. See the following figure and table, as well as "[About Eclipse SE database fields](#)" on page 5-12.
- c. Make changes for other fields while the dialog box is open.
- d. When finished, click **OK**.


NOTE: Field changes can also be made after the case is migrated.



Summation Migration: Field Considerations

Item	Consideration
Image key	The image key field in the Summation database will be automatically detected. Do not change this field’s type on the Step 1 tab. Make other changes if needed (such as field name).
OCR text	To include Summation’s OCR text, ensure that an EXTRACTEDTEXT field exists.

Summation Migration: Field Considerations (Continued)

Item	Consideration
Summation Issues field	Summation issues that have been applied to documents will be automatically added to the Eclipse SE _DOCTAGs field, so it is not necessary to include the Summation Issues field in your migration. If it is included in the case, it will be a multi-value field by default and will not be updated when tags are applied in Eclipse SE.
Field names	By default, field names for new cases or load files will match those of the Summation case. If you change a field name so that it does not match the Summation field name, you will need to manually map the field in the following step.
Concatenated fields	If you will be concatenating fields (mapping two or more fields into one Eclipse SE field), ensure that those fields are of the same type.
Field position	<p>The <i>default field position</i> is the default order in which fields will appear on the Step 2 tab, as well as locations such as Eclipse SE Administration's Case Management > Database Fields tab and in Eclipse SE Desktop Case View or related tab.</p> <p>To change the field position in the Modify Field Definitions dialog box, ensure that the field table is in ascending order by the Order column, then select a field to be moved and click the Up or Down button until the field is in the needed position.</p> 

9. When finished, continue with "[Step 2: Map fields](#)," next.

Step 2: Map fields

Match the data fields defined in your Summation case to the fields defined for the case in Eclipse SE Administration. Notes:

- If you are creating a new case, fields are “mapped” in order to create them. Only the fields you map, plus required Eclipse SE system fields, will be created in your new case.
- As a minimum, the Summation image key field (for example, DocID) must be mapped to the Eclipse SE BEGDOC field.



NOTE: If the BEGDOC field is incorrectly mapped, your case will be migrated, but the data will be invalid and subsequent problems will occur.

- To include extracted text, make sure the Summation OCR field is mapped to the Eclipse SE EXTRACTEDTEXT field.



NOTE: OCR displays on the Eclipse SE Desktop’s **Extracted Text** tab; if it is included in the migration, page breaks on that tab may differ from those in Summation.

- More than one field in the Summation case can be mapped to a single field in the case, providing the file type is the same. For example, the import file may have two fields to define an author’s name (First Name, Last Name). In the Eclipse SE case, a single field might be preferred for this information (Name).
- Eclipse SE required system fields (BEGATTACH, ENDATTACH, ENDDOC, EXTRACTEDTEXT, FILE_EXT, FILE_ID, IMAGECNT, MD5_HASH, NATIVE, NATIVE_SIZE, TEXT_SIZE) will be created for the new case whether or not they are mapped.

Complete one of the following procedures to match fields for document data.

Auto-select fields

Eclipse SE Administration will match the fields based on the field name. For example, if the Summation case contains a field called IMGKEY and the case contains a field named IMGKEY, they will be automatically matched using this procedure.

To auto-select fields:

1. Complete "[Step 1: Set up the migration](#)" on page 5-54, then click the **Step 2. Map Fields** tab.
2. Click the **Auto-Select By Field Name** button. If you are creating a new case, clicking this button will

3. Evaluate the matching to determine if:
 - the auto-matching does not meet your needs,
 - some fields are not matched, and/or
 - some fields should not be included.
4. For fields that should not be included, clear the **Include** option.
5. For other mapping problems, continue with "[Manually match fields](#)," next.
6. When all fields are correctly mapped, continue with "[Step 2: Select migration options](#)" on page 5-61.

Manually match fields

Complete the following steps to manually match the fields that have not been mapped or for which mapping needs to be corrected.



NOTE: To map a field, click in the corresponding **Eclipse SE Field** column and select the needed field. (Clicking the **Include** option alone is not sufficient.)

1. After or instead of auto-mapping fields, evaluate the field information on the **Step 2. Map Fields** tab to determine which fields need to be mapped.
2. For a field that is not mapped or is incorrectly mapped:
 - a. Click in the corresponding Eclipse SE Field area. (It may be blank, contain a field name, or the word "Select.")
 - b. Click and choose the needed field.

The list shows the Eclipse SE field names and types to assist you with matching. Matching a field automatically selects the **Include** option for you.

3. If you map two or more fields to the same Eclipse SE field (concatenate them), the fields will be highlighted. If this is correct, select a **Merged Field Delimiter** (or none) as described on page 5-64. When selected, a delimiter will be included in the merged data to identify the original field delineation(s).
4. Repeat steps 2 and 3 for all fields to be mapped.
5. When finished, continue with "[Step 2: Select migration options](#)," next.

Step 2: Select migration options

After completing "[Step 2: Map fields](#)" on page 5-59, make selections on the bottom of the **Step 2** tab, based on the content of the Summation case and needs of the Eclipse SE case:

1. If you are creating a new case or load files only, skip to [step 4](#). If you are importing into an existing case, go to [step 2](#).
2. For existing cases, select the way in which duplicate records (fielded data) will be migrated. See the following table.

Summation Migration: Mode Options

Option	Description		
Append All Records	Summation data will be migrated as follows: <ul style="list-style-type: none"> • Records in the Summation case that do not currently exist in the Eclipse SE case will be added. • Records in the Summation case containing fields that match those already populated in the database will <i>not</i> update those populated fields. 		
Overlay/Append	Use this option to update existing records and add new records to Eclipse SE case. <ul style="list-style-type: none"> • Records in the Summation case that do not currently exist in the Eclipse SE case will be added. • Records in the Summation case that are also in the Eclipse SE case will overwrite only the fielded information in the Eclipse SE case. The following example shows the effect when this option is selected. 		
	Summation Case "Pet" Field	Eclipse SE Case "Pet Field"	
		Before Migration	After Migration
	dog	(blank)	dog
		cat	dog
	dog	dog	
(blank)	dog	(blank)	

Summation Migration: Mode Options (Continued)

Option	Description
Overlay Only	<p>Use this option to update existing records.</p> <ul style="list-style-type: none"> Records in the Summation case that do not currently exist in the Eclipse SE case will <i>not</i> be added. Records in the Summation case that are also in the Eclipse SE case will overwrite only the fielded information in the Eclipse SE case (see the previous example).


3. For existing cases, if you select **Images** in the next step, select the action to take when an image exists for a record that exists in both Summation and Eclipse SE. See the following table.

Summation Migration: Image Options

Option	Description
Create error if image exists	Select this option to leave the images (their paths) in the Eclipse SE case unchanged and to log error messages for all documents for which image files exist in both the Eclipse SE and the Summation cases.
Overwrite and remove existing annotations	<p>Select this option to replace the Eclipse SE case images with those of the Summation case images by changing the image paths (original image files are not deleted or replaced).</p> <p>Also remove any annotations (highlighting, mark-ups, and/or redactions) that have been applied to the Eclipse SE images.</p>
Overwrite but retain existing annotations	<p>Select this option to replace the Eclipse SE case images with those of the Summation case images by changing the image paths (original image files are not deleted or replaced).</p> <p>Keep all annotations (highlighting, mark-ups, and/or redactions) that have been applied in both Eclipse SE and Summation.</p>
Skip existing images	Select this option to leave images in the Eclipse SE case unchanged (for all documents for which images exist in both the Eclipse SE and the Summation cases).

4. Select the types of files to be included in the migration in the **File Options** area. See the following table.

Summation Migration: File Options

Option	Description
Native files	<p>Select this option to add Summation eDocuments (native files) to the Eclipse SE case.</p> <p>If you are importing into an existing case and native files exist in both the Eclipse SE and the Summation cases, Summation files will be used (the native file paths will be changed; original native files will not be deleted or replaced).</p>
Images	<p>Select this option to add Summation images to the Eclipse SE case as specified in step 3.</p> <p>When you select images, also select how to handle Summation redactions and/or annotations:</p> <ul style="list-style-type: none"> • Redactions: Select to include redactions applied in Summation to the images in the Eclipse SE case. • Annotations: Select to include annotations applied in Summation to the images in the Eclipse SE case. <p>See "Migration limitations" on page 5-53 for details on certain exclusions.</p>
Transcripts	<p>Select this option to add Summation transcripts to the Eclipse SE case. Most transcript mark-ups and annotations will be included (notes, highlights, links).</p> <p>Links to documents (images or external documents) are included; the following links are currently not supported: transcript-to-transcript links, web/research links, and advanced (script) links.</p> <p>If you are importing into an existing case, Summation transcripts will be added to the case.</p> <p> NOTE: Transcript names must be unique; an error will be noted in the migration log file if the Summation case includes a transcript with a name matching one in the existing case (and the transcript will not be migrated).</p>

5. **Options:** Select additional options as described in the following table.

Summation Migration: Field and Date Options

Option	Description
Merged Field Delimiter	<p>If you concatenated fields during field mapping, select a delimiter to separate the merged field data:</p> <ul style="list-style-type: none"> • If a delimiter is not needed, select (none) skip to the Date Format selection. • To use a semicolon as the delimiter, select ; and skip to the Date Format selection. • To use a different delimiter, select Custom and continue with the following steps. <ol style="list-style-type: none"> a. In the Create Custom Delimiter dialog box, click the Characters or ASCII Values option, depending on how you will specify the delimiter character(s). b. If you select Characters, enter the character(s) in the top field under the Characters option. Separate more than one character with a space. The ASCII value for each character appears in the bottom field. c. If you select ASCII Values, enter the ASCII value(s) for the needed character(s) in the top field under the ASCII Values option. Separate more than one value with a space. The character corresponding to each value appears in the bottom field. d. When finished, click OK.

Summation Migration: Field and Date Options (Continued)

Option	Description
Date Format	<p>Select the date format that most closely matches the dates in your Summation case. For example, if your case includes dates in the format of dd-mm-yyyy, select the D/M/Y option. Dates to be migrated must be in a common date format. (For example, 27-09-2009 or 27 Sept 2009.)</p> <p>Consider the following information regarding partial dates (for example, 09-2009):</p> <ul style="list-style-type: none"> • If you are migrating into an existing case and want to include partial dates, ensure the Date Format Options for the case are set as needed; see "Step 6: Select Case Options" on page 5-32 for details. • If you are creating a new case, dates will be migrated in whatever form they exist in the Summation database; date options can be defined for the case afterward.

6. When all options are selected, go to "[Step 3: Finish the migration](#)," next.

Step 3: Finish the migration

This procedure "introduces" Eclipse SE to your Summation database and imports the selected case into Eclipse SE.

1. If the migration **Step 2** tab is not the active tab, click the tab.
2. Click **Import Records**.
3. If you are creating only load files, navigate to and select the folder (or create a new folder) in which the load files should be saved.



NOTE: If the case includes transcripts, the transcript files will also be exported to this location. If you use the load files to create a case, these transcripts will need to be imported separately as described in [Chapter 10](#).

4. Watch migration progress on the **Step 3. View Progress** tab.
5. Continue with one of the following steps:
 - If you created a new case/migrated into an existing case, go to "[Step 4: Verify the migration](#)," next.
 - If you created load files only, you will find them in the folder defined in [step 3](#).

Step 4: Verify the migration

Once data is migrated into Eclipse SE, complete these steps to view and verify record details:

1. In the migration workspace, click the **Step 4. Verify** tab.
2. Evaluate records as explained in [Chapter 11](#). Possible activities include:
 - Reviewing the **Documents** list and document/page details
 - Deleting a document or page
 - Checking/changing image (or native) file path
 - Viewing images
 - Correcting the path for the case images.



NOTE: You will need to correct the path for Summation images if either of the following statements applies to the Summation case you migrated:

- The Summation image path did not include a hard drive or UNC drive (for example, the path is "\\images\001\" instead of C:\images\001" or "\\server001\images\001"), or
- The Summation image path includes volume information (for example, "CD-101:\images\001").

In either case, Eclipse SE defines the path with the volume name "SUMM01." Correct the path for this volume in the Volume Information area of this tab. For details regarding this area, see ["Checking the Image File Path"](#) on page 11-5. You can also use Eclipse SE case tools as explained in ["Managing Volumes"](#) on page 7-28.

3. When finished, continue with ["Step 5: View imported tags"](#) on page 5-67 and/or ["Step 6: View imported redaction categories"](#) on page 5-67.



TIP: Reports that can help you evaluate the imported records are available in Case Management. See ["Working with Reports"](#) on page 15-1 for details.

Step 5: View imported tags

Summation issues (tags) that have been applied to documents are automatically included when you migrate a case to Eclipse SE; complete the following steps to review the resulting tags:

1. In the migration workspace, click the **Step 5** tab.
2. Review the migrated tags and take one of the following actions:
 - To make changes now, click the **Modify Tag Palette** button and add, modify, or delete tags as needed. For details, see "[Step 4: Creating a Tag Palette](#)" on page 5-22.
 - To make changes later, when you are finished reviewing the tags, go to the next step. (When you are ready to make changes, see [Chapter 6](#).)
3. Continue with the next procedure.

Step 6: View imported redaction categories

If redactions were included in your migration, complete the following steps:

1. In the migration workspace, click the **Step 6** tab.
2. Review the migrated redactions and take one of the following actions:
 - To make changes now, click the **Modify Redactions** button and add, modify, or delete redactions as needed. For details, see "[Step 5: Create Redaction Palette](#)" on page 5-29.
 - To make changes later, when you are finished reviewing the redactions, go to the next step. (When you are ready to make changes, see [Chapter 6](#).)
3. Continue with additional activities to complete your case, as described in "[Next Steps](#)" on page 5-70.

Migrating Multiple Cases (Batch Migration)

A number of cases can be migrated at one time from Summation. When multiple cases are migrated at one time, many case details are included automatically. For example, cases will be migrated as new cases with the names that exist in Summation, all cases will be added to one client, and all fields will be included, and the data directory will be the default system directory.



NOTE: If Summation cases have the same name (such as cases in different categories), Eclipse SE will add a suffix to the case name to ensure all names are unique in Eclipse SE. For example, if the Summation case name "Smith-Jones" exists under different categories, the names in Eclipse SE will be "Smith-Jones-001" and "Smith-Jones-002."

Complete the following steps to migrate multiple Summation cases at one time:

1. In Eclipse SE Administration, expand the **Client/Case Management** menu in the Eclipse SE navigation panel and click **Batch Migrate Case from Summation**. Eclipse SE will start Summation if needed. (If it is already open, it will be restarted.)¹²



IMPORTANT: To ensure a successful migration, do not close Summation while Eclipse SE is migrating cases. If Summation is closed, Eclipse SE will reopen it, but errors may result.

2. Click the **Step 1. Setup Migration** tab.
3. Select the Summation cases to be migrated; use the **Select All** and **Clear All** buttons as needed.



NOTE: In the Summation case list, cases with the same name (under different categories or directories) will be listed by category/directory name followed by case name, such as "Category A_Smith-Jones" and "Category B_Smith-Jones."

4. **Client:** Select the client to whom the cases will be added. If the client is not listed, add it as explained in [Chapter 4](#), then return to case migration.

12. Eclipse SE queries the registry to find the location of the Summation program. If Summation has been installed on a network server (not locally), Eclipse SE may not be able to start it properly. In this case, you will need to start Summation manually in order to continue with this procedure.

5. Optional: The **Native Time Zone Offset** setting controls the offset to Greenwich Mean Time (GMT) that is applied during date and time formatting. The default setting is GMT (0 offset). This setting can be made after the case is created if preferred.

For details, see "[Native Time Zone Offset](#)" on page 5-56.

6. In the **File Options** area, select the types of files to be included in the migration. For details, see "[Summation Migration: File Options](#)" on page 5-63.
7. In the **Options** area, select the **Date Format** that most closely matches the dates in your Summation case.
See "[Summation Migration: Field and Date Options](#)" on page 5-64 for additional details.
8. In the **Action** area, if you want to create load files instead of add the cases to Eclipse SE, select the **Load Files Only** option.
9. If you selected **Load Files Only** in [step 8](#), navigate to and select the folder (or create a new folder) in which the load files should be saved.

**NOTES:**

- The maximum length for a fully qualified file name, which includes the case name and path selected here, is 260 characters (<248 characters for the path). Ensure that the case name and path do not exceed this maximum.
- If the case includes transcripts, the transcript files will also be exported to this location. If you use the load files to create a case, these transcripts will need to be imported separately as described in [Chapter 10](#).

10. When all selections are complete, click **Import Records**.
 11. Watch migration progress on the **Step 3. View Progress** tab.
- Continue with additional activities to complete your case, as described in "[Next Steps](#)," next.

Next Steps

To complete your new case, continue with additional activities as needed.

Item	Action	Page
Required		
Case data/ documents	Import documents/data for the case, and/or ingest image and/or native files.	8-1 9-1
Case groups and users	Assign groups and users to the case and associated reviews/batches. (Groups and users must exist and be assigned to a case before a review pass can be set up.)	3-1
Recommended		
Review batches	Set up batches for the review of case documents.	12-1
Coding forms	Create coding forms to facilitate efficient field editing.	6-30
Case- related documents	Add instructions, alerts, and other documents to ensure reviews are conducted correctly and consistently.	13-1
As needed		
Tags, redactions, stop words	If tags, redactions, or stop words were not included in case creation or need to be revised, plan the time you will address these items or complete this work now.	6-17 6-19 6-23
Field-level changes	Edit field definitions; change field-level security if required for your organization.	6-11
Print server ^a	If your firm has large printing needs and you have purchased the Ipro Print Manager, configure a print server to manage Eclipse SE Desktop print jobs.	14-1
Transcripts	Import transcripts into your Eclipse SE case and configure transcript issues.	10-1

a Separately purchased component.

6 Managing Eclipse SE Cases

In this Chapter

Overview	6-1
Basic Case Changes and Actions	6-4
Managing Database Fields	6-9
Managing Assigned Groups and Users	6-13
Changing the Tag Palette	6-17
Changing the Redaction Palette	6-19
Configuring Ipro Production Shield	6-21
Working with Stop Words	6-23
Reviewing/Changing Database Records	6-26
Configuring Key Words	6-27
Managing Coding Forms	6-30
Managing Multi-Field Sort Indexes	6-38
Other Case Management Activities	6-40

Overview

Once a case has been created, several aspects of the case can be changed. Follow the procedures in this chapter to manage existing cases.

Privileges Required

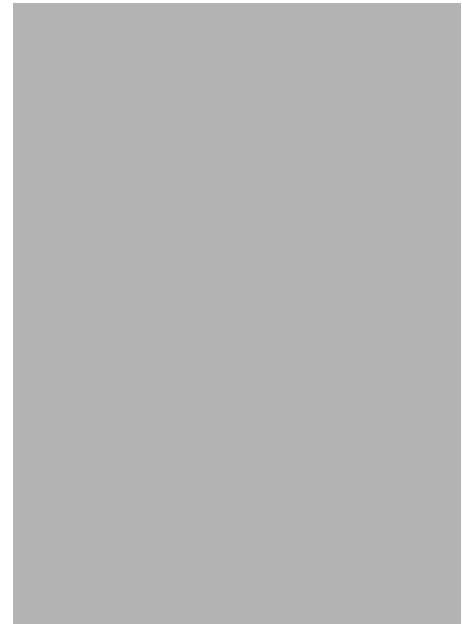
By default, you must have Super Administrator rights to perform all Ipro Eclipse SE case management tasks. Those with Case Administrator rights can perform all case management tasks except for creating or deleting cases.

These requirements may differ if the Super Administrator modifies privileges for a particular user.

For New Administrators

Cases must be created as described in [Chapter 5](#). Creating cases introduces you to Eclipse SE features and functions. If you are a new administrator, familiarize yourself with Eclipse SE case management as follows:

1. As needed, review "[Working in Eclipse SE Administration](#)" on page 2-8.
2. In Eclipse Administration, click the **Case Management** tab.
3. In the navigation panel, click **Case Management**.
4. On the Case Management workspace, select a client and case of interest.
5. Review all tabs and make note of the information and options in the Case Management workspace. Refer to this guide for clarification on information and procedures.



Impact of Changes

Certain case changes require that the indexes used for searching be rebuilt, such as:

- Changing some aspects of the case definition
- Changing database field definitions (field type, flags)

Depending on the size of the database, system capabilities, and other factors, indexing may consume significant system resources and time.

For the Ipro database, in most cases you will be given the opportunity to re-index when changes are made. If you do not re-index at that time, you will need to rebuild indexes manually to ensure that search indexes are aligned with your case definition. If you are working with a SQL database, you will need to re-index using standard SQL procedures.

See "[Working with Case Tools](#)" on page 6-40 for more details on manually rebuilding indexes.



IMPORTANT! To minimize the impact to the system and interruptions in case activities, it is recommended that you re-index cases during “off hours,” for example, at the end of the work day or on the weekend. Notify users who may work at these times of possible interruptions.

Getting Started with Changes

For all of the procedures in this section, begin with the following steps:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, click **Client/Case Management**, then **Case Management**.
3. Select the needed client ID and case. If the case you want to change is currently inactive, select the Show Inactive Cases option. (Inactive cases can be changed.)



NOTE: If the case is not in the case list:


1. Select the **Show Inactive Cases** option.
 2. Right-click the inactive case and select **Mark Case as Active**.
4. If needed, review the case’s database records before you begin making changes:
 - a. Click the **Database Records** tab.
 - b. Click **List All Records** or **Build Search** to locate records of interest. For details on searching, see the *Ipro Eclipse SE Search Reference*.
 - c. Review the list and/or click an individual record to review record details.
 - d. To jump to a specific record, right-click in the list and select **Go to Image Key** or **Go to Doc Id**. Select or enter the needed image or document number and click **OK**.
 5. Continue with procedures explained in this chapter.

Basic Case Changes and Actions


Changing Case Details

Case details that can be changed are shown in the following figure.



 **NOTE:** Change details as explained in the following procedure. Clearly, if review of a case has begun, some changes will not be appropriate/allowable.

To change case details:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. On the Case Management workspace, select the needed client ID and case.
3. Click the **Case Details** tab.
4. Click the **Modify Case** button. Complete the following steps as needed.
5. **Matter Number:** To change the matter number, enter the needed number. See page 5-4 for details.
6. **Data Directory:** To change the data directory, enter or navigate to the data directory for the case. See page 5-4 for details.
7. **Import Tags:** To import tags from a case definition file:
 - a. Click **Import Tags**.
 - b. Click  to navigate to and select the .CSE file. For details on .CSE files, see "[Exporting a Case Definition File](#)" on page 6-6.
 - c. Click **Open** in the Select Case Definition File dialog box.
8. Make other changes in the Modify Case Details dialog box as needed:
 - Native Time Zone setting and Load File Validation option
 - Tagging Options
 - History/Tracking Options
 - Date Format OptionsRefer to the procedure in "[Step 6: Select Case Options](#)" on page 5-32 for details on these options.
9. If needed, select **Mark case as inactive** to make the case unavailable to Eclipse SE Desktop users. See the next procedure for details.
10. When finished, click **OK**. All changes made will be implemented.

Making a Case Inactive or Active

You may sometimes need to put a case "on hold" for some reason. Eclipse SE Administration allows you to make a case inactive.

An inactive case cannot be viewed or reviewed in Eclipse SE Desktop. It can be shown or hidden in the case list in Eclipse SE Administration. A report is available to help you locate inactive cases.

To activate or inactivate a case:

1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. To inactivate an active case, left-, then right-click the case name and select **Mark case as inactive**.
4. To activate an inactive case:
 - a. If inactive cases are hidden, select the **Show Inactive Cases** option.
 - b. Right-click the inactive case and select **Mark Case as Active**.
5. Optional: Use the Inactive Case Report to locate all inactive cases. See ["Inactive Case Report"](#) on page 15-17 for details.

Exporting a Case Definition File

About case definitions

After you create a case, Eclipse SE Administration allows you to export the definition to make it easy to create future cases that share similar characteristics. The load file you create is an .XML file with a file extension of .CSE.

This file contains the following case characteristics as selected by the user, but no case data. (A case definition file can be created whether or not data has been added to the case.)

- User-defined database field definitions (field names, types, and options)
 - **NOTE:** System fields are not included in .CSE files. If a .CSE file is used to create a new case, new system fields will be created automatically.
- Control/pick list values
- Tag palette (tag groups and tags)
- Redaction palette
- Stop words

- Key words
- Saved searches
- Coding forms

The following case characteristics are included in the .CSE file by default:

- Tagging options (document/case level tagging)
- Date format
- History/tracking options
- Import validation option

Export procedure

To export a case definition file:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client.
3. In the **Case Name** list, right-click the case whose definition is to be exported and select **Save case definition to a file**.
4. In the resulting dialog box, select the items to export and click **OK**.
5. In the next dialog box:
 - a. Navigate to the location where you want to save the case definition file.
 - b. Enter a file name and click **Save**. The file extension is not required.
6. In response to the confirmation message, click **OK**. When appropriate, use the exported case definition file to create a new case as explained in "[Creating Cases](#)" on page 5-1.

Exporting Desktop Layouts

Desktop layouts saved on one computer (in Eclipse SE Desktop) can be exported by an administrator (working on the same computer) and then imported into different cases. This is useful for administrators who want to distribute common Desktop layouts to reviewers.

Any or all of the layouts saved by all users working on the computer can be exported. For details on layouts and saving them, see Chapter 2 of the *Eclipse SE User Guide*.

To export Desktop layouts:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select a client and case. (Layouts are computer-, not case-specific, so any case can be chosen.)

3. On the **Case Details** tab, click **Export Desktop Layouts**.
4. Select the layouts to be exported and click **Ok**.
5. Complete the Save As dialog box and click **Save**. Selected layouts are saved in a single file with an extension of .layout.
6. Place the .layout file in a network location available to Eclipse SE users. Inform them that new layouts are available; they can be imported as explained in Chapter 2 in the *Eclipse SE User Guide*.

Deleting a Case

A case can be deleted *only* by a Super Administrator or a Case Administrator who is assigned to the case.



CAUTION! Deleting a case *permanently* removes the case from Eclipse SE Administration and Eclipse SE Desktop, and also removes associated records. Back up a case before it is deleted.

To delete a case:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3. For this procedure, you *must* log on as a Super Administrator.
2. Make sure no one is working in the case (in Eclipse SE Desktop or another instance of Eclipse SE Administration). You cannot delete a case if any users are logged in to the case (or batches based on the case).
3. In the Case Management workspace, select the needed client and case.
Review the caution above and make sure the correct client and case are selected in the left pane of the Case Management workspace.
4. Click the **Case Details** tab, then click the **Delete Case** button.
5. In response to the warning message, click **Yes, delete the case**.

Managing Database Fields

Overview

After a case is created or migrated, you may need to change various aspects of the database fields.

Field change limitations

If the case does not yet contain data (because you have not yet imported any), then most changes to database fields can be made.

After a case contains data, some changes are not allowed, as indicated by what is available in the Field Definition dialog box.



NOTE: Adding or changing a control list for a field that is defined with the **Category** flag will not impact existing data.

Changing Field Definitions

To change field definitions:

1. Getting started:
 - a. Review "[Field change limitations](#)" on page 6-9.
 - b. Start Eclipse SE Administration as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Database Fields** tab. Field details for the case are listed. Continue with the following steps as needed.






TIP: Sort or rearrange the columns on the **Database Fields** tab for the current working session to suit your needs. To sort, simply click the heading of the column to be sorted. Click again to reverse the sort order. To rearrange columns, drag a column heading to a desired location.

4. To **delete** a field, click its corresponding button, then click **Yes** in response to the confirmation message.



NOTE: Deleted fields remain available in Eclipse SE Administration. They are changed to the field type DELETED.

5. To **edit** a field definition:
 - a. Click  corresponding to the field to be edited.
 - b. Make changes as allowed in the Field Definition dialog box. If Eclipse SE identifies issues with a prospective change (namely, if you try to change a field type¹³), a red message will appear in the dialog box. See ["About Eclipse SE database fields"](#) on page 5-12 for details on fields.
 - c. To change field-level security, see ["Changing Field-level Security"](#) on page 6-11.
 - d. When finished, click **Save**.
6. To **add** a new field:
 - a. Click **New Field** and define the new field.
 - b. Define the field. If Eclipse SE identifies issues with a prospective definition, a red message will appear in the Field Definition dialog box. See ["About Eclipse SE database fields"](#) on page 5-12 for details on fields.
 - c. When finished, click **Save**.
7. **Rebuilding indexes:**
 - a. If the changes you have made impact the case index, the adjacent button will appear at the top of the **Database Fields** tab. 
 - b. To rebuild case indexes now, click the button and click **OK** in response to the confirmation message (shown in this figure). 
 - c. Wait as the index is rebuilt. A completion message displays on the **Database Fields** tab when indexing is complete (and the **Rebuild Case Indexes** button disappears).
 - d. If you do not rebuild the case index now, plan a time for this task; see ["Rebuilding Indexes"](#) on page 7-5 for details.

13. For example, you cannot change a SINGLE VALUE field to NUMERIC after the field contains data.

Changing Field-level Security

Before you begin

Field-level security is part of a field's basic definition. By default, all fields are set to **Update** for a case. With this setting, users assigned to a case or batch will be able to edit the fields in Eclipse SE Desktop.

Note:

- Field-level security applies to viewing and changing field *data*, not modifying field definitions.
- Field-level security does not apply to Case or Super Administrators, who can edit all fields within a case or batch regardless of field-level security settings.
- Coding form security, if set, will override field-level security.
- Plan your field-level security strategy before making field-level security changes.



NOTE: For best results, evaluate the fields in the database to determine the appropriateness of allowing or restricting updates. Several possible reasons for imposing restrictions exist, for example:

- Changing the content of your database causes it to be re-indexed for searching purposes. Depending on the size of the database, system capabilities, and other factors, indexing may consume significant system resources and time.
- Changes made to field content may cause record details to become inconsistent across views in Eclipse SE Desktop (that is, in **Record View** and on the **Image** tab, **Extracted Text** tab, **Native Viewer** tab).

Set field-level security

To set field-level security:

1. Start Eclipse SE Administration as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Database Fields** tab.
4. Click corresponding to the field for which security is being set and complete step 4 and/or 5.
5. To set the default security level for all users, select a field security option in the **Default Field Access** area:




The default setting will apply to the field in Eclipse SE Desktop, whether in the case table or in a coding form (except for Super or Case Administrators).

6. To set field security for individual users or groups:
 - a. In the **Security Restrictions by Group/User** area, click **Add**.
 - b. As applicable, click **Group** or **User**, then select the group or user for which field security is to be set.
 - c. Select the needed setting (described in the previous figure).
 - d. Click **OK**.
 - e. Repeat these steps to set field security for other groups or users.
 - f. Review settings in the **Security Restrictions by Group/User** area.
 - g. When finished, click **Save** in the Field Definition dialog box. These settings will override the default field access setting.

Managing Assigned Groups and Users

Adding or Removing Groups

To add or remove groups who can view a case and/or take part in batch reviews:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. Click  in the **Groups** area.
5. In the Modify Group Assignments dialog box, select/clear the groups to be added/removed.
6. When finished, click **OK**.
7. If needed, change the case/group role and privileges, which will be in effect while the group is working in the selected case, as explained in the next procedure.

Changing Case/Group Role or Privileges

A role/privileges can be assigned to a group that will be in effect only when the group is working on a specific case. For details on how Eclipse SE selects the role/privileges to be in effect, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13. To set a case/group role and/or privileges:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. In the **Groups** list, right-click the group and select **Modify Role and Privileges** on the context menu.
5. In the Modify Privileges dialog box, select the role, then add or remove individual privileges if needed.
6. When finished, click **OK**.

Clearing Case/Group Role or Privileges

If a case/group role and/or privileges have been assigned to a group for a specific case, the settings can be removed. For details on how Eclipse SE selects the role/privileges to be in effect, see ["How Does Eclipse SE Determine Privileges?"](#) on page 3-13. To clear a case/group role and/or privileges:

1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. In the list of assigned groups, right-click the group and select **Clear Role and Privileges** on the context menu. The group's case role changes to *(not set)*.


Setting or Clearing Member Role or Privileges

A role and/or privileges can be assigned to a user that will be in effect only when the user is working as a group member on a particular case. The Case Management workspace lists all group members; view their role and privileges as explained in ["Review a user's role or privileges"](#) on page 6-16.

If you want a group member to have a member role when they are working on a particular case, see ["Assign a member role and privileges"](#) on page 3-35.

Adding or Removing Users

To add or remove users who can view and/or take part in batch reviews:

1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. Click  in the **Users** area.
5. In the Modify Case/User Assignments dialog box, select/clear the users to be added/removed.
6. When finished, click **OK**.
7. If needed, change the case/user role and privileges, which will be in effect while the user is working in the selected case, as explained in the next procedure.

Changing Case/user Role or Privileges

A role and/or privileges can be assigned to a user that will be in effect only when the user is working on a specific case. For details on how Eclipse SE selects which role/privileges are in effect, see "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13.

Setting a case/user role or privileges

To set a user's case/user role and/or privileges:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. In the **Users** list, right-click the user name and select **Modify Role and Privileges** on the context menu.
5. In the Modify Privileges dialog box, select the role, then add or remove individual privileges if needed.
6. When finished, click **OK**.

Clear a case/user role or privileges

If a case/user role and/or privileges have been assigned to a user for a specific case, the settings can be removed. To clear a user's case role/privileges:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. In the **Users** list, right-click the user and select **Clear Role and Privileges** on the context menu. The user's case role changes to *(not set)*.

Review a user's role or privileges

To clarify the role and privileges that a particular user has (whether the user is a member of a group that is assigned to a case or is assigned individually), complete the following steps:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Groups and Users** tab. Groups and users who have been assigned to the case are listed.
4. Select the user of interest:
 - a. To review the case access for a user who is a member of a group, click the group in the **Groups** area, then click the user's name in the **Members of *groupname*** area (where *groupname* is the name of the group you selected).
 - b. To review the case access for a user who has been individually added to a case, click the user's name in the **Users** area.
5. Click **View > Case Access** in the appropriate part of the workspace (**Users** or **Members of *groupname***) of the workspace. A summary of the user's case access and privileges display in the User Case Access dialog box, as shown in the following figure.



See ["How Does Eclipse SE Determine Privileges?"](#) on page 3-13 to review Eclipse SE security.

**Note:**

- Scroll in the window to see all privileges.
- If the user has multiple settings, privileges are additive, and the cumulative privileges will be listed.
- If the user has access by virtue of being in more than one assigned group, then the combined set of privileges is listed.

6. When finished, click **Close Window**.

Changing the Tag Palette


Tag groups, including tag group rules, can be added, changed, or deleted with the following exception. Once an Eclipse SE Desktop user applies a tag, neither that tag nor the group to which it belongs can be deleted.

Users can refresh the tag palette in Eclipse SE Desktop after changes are made in Eclipse SE Administration.

To change the tag palette for an existing case, complete the following procedures.

1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Tag Palette** tab. Review existing tags and tag details (tag groups, rules, options, and shortcut keys) and continue with the following steps as needed.
4. To **create new** tags:
 - a. Click the **Modify Tag Palette** button.
 - b. Click the **Create Group** button In the Modify Tag Palette dialog box.
 - c. In the Add Group dialog box, enter the name of each group to be created, one group name per line. Names must be unique.
 - d. When all group names are entered, click **OK**.
 - e. For each new tag group, click a group name, select the **Tag Group Rules** to be applied to the group. Reference: ["Group rules"](#) on page 5-23.
 - f. Next, select a tag group and click the **Create Tags** button.


- g. In the Add Tags dialog box, enter the name of each tag to be created, one tag name per line. Names must be unique within each group.
 - h. When all tag names are entered, click **OK**.
 - i. For each new tag, click a tag name, then select the **Tag Options** to be applied to the group. Reference: "[Tag options](#)" on page 5-24.
 5. To **create nested** (child) tags:
 - a. If needed, review "[Nested tags](#)" on page 5-25.
 - b. Click the **Modify Tag Palette** button if needed.
 - c. Click a tag that will serve as a parent tag, then click **Create Tags**.
 - d. Enter the name of each nested tag required, one name per line.
 - e. When all nested tags are entered, click **OK**.
 - f. Repeat steps c - e for any other tags requiring nested tags.
 6. To **modify** tag groups or tags:
 - a. If needed, click the **Create Tag Palette** button; review details in the Modify Tag Palette dialog box.
 - b. Click a tag group or tag to be changed and make the needed changes. This includes changing group or tag names, changing tag group rules, or changing tag options.
 - c. Repeat step b for all changes.

 **NOTE:** If a tag is applied and subsequently renamed, the name that appears in document history is the name in effect when the tag was applied (or removed).
 7. To **delete** unused tag groups or tags:
 - a. If needed, click the **Create Tag Palette** button.
 - b. Click a tag group or tag to be deleted and click the appropriate **Delete** button. Note that the selected item will be deleted immediately.
 - c. Repeat step b for all tag groups and tags to be deleted.
 8. When finished, click **OK** in the Modify Tag Palette dialog box.
 9. Notify users of tag changes and provide instructions as needed.


Changing the Redaction Palette

By default, Eclipse provides one redaction category, and up to 99 redaction categories can be defined.


To change the redaction palette for an existing case:



1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Redaction Palette** tab. Review existing redactions and continue with the following steps as required for your case.
4. To create new redactions:
 - a. Click the **Modify Redaction Palette** button.
 - b. In the Modify Tag Palette dialog box, click .
 - c. Complete the Add Redaction Label dialog box as described in the following table.

Defining Redactions

Item	Description
Label	Enter a name for the redaction. This name will appear on the redaction. You may also omit a label.
Font	To change the label font, click the Font button and make changes in the Font dialog box. When finished, click OK .
Redaction Colors	Evaluate selected colors in this example.
Font Color and Redaction Color	<p>To change the font and/or redaction color, complete one of the following actions:</p> <ul style="list-style-type: none"> • Choose a basic color from the Font Color or Redaction Color list, or • Click the Font or Redaction Color button, , and complete the Color dialog box. <p style="text-align: right;"><i>Continued</i></p>

Defining Redactions (Continued)

Item	Description
Font/ Redaction Color, <i>continued</i>	 TIP: When a redaction category has no label and the redaction color matches the document background (for example, white on white), the redaction will cover data but will not indicate that a redaction exists.
Description	Optional: Enter notes or details about this redaction.

- d. Repeat steps b - c for all new redactions.
5. To modify redactions:
 - a. If needed, click the **Modify Redaction Palette** button; review the redactions in the Modify Redaction Palette dialog box.
 - b. Click a redaction to be changed, then click  and make the needed changes. This includes changing the label, font, colors, or description.
 - c. Repeat step b for all changes.
6. To delete unused redactions:
 - a. If needed, click the **Modify Redaction Palette** button.
 - b. Click a redaction to be deleted and click . Note that the selected redaction will be deleted immediately.
 - c. Repeat step b for all redactions to be deleted.
7. When finished, click **OK** in the Modify Redaction Palette dialog box.
8. Notify users of redaction changes and provide instructions as needed.

Configuring Ipro Production Shield

About Production Shield

Production Shield prevents specified documents from being inadvertently included in a production output. A saved public search, which can be created beforehand or when you configure Production Shield, is used to identify the documents that should not be produced. The search is often for documents that are tagged or redacted in a certain way, but any search can be used.

If a production job contains documents that are protected by Production Shield, the job can continue without those documents, or you can cancel the job and select a different set of documents or modify Production Shield if appropriate.



The following figure shows the **Production Shield** tab in the **Case Management** workspace:



Production Shield Configuration

To configure Production Shield:

1. Before configuring Production Shield, take one of the following actions:
 - Identify the saved search in Eclipse SE Desktop that will find all documents that should not be produced.
 - Create and save the needed search in Eclipse SE Desktop.
 - Plan the search so you can create it during Production Shield configuration.
2. In Eclipse SE Administration's **Case Management** tab, click **Client/Case Management > Case Management**.
3. In the Case Management workspace, select the needed client ID and case.

4. Click the **Production Shield** tab. (If it is not visible, click  on the right side of the workspace tabs until it appears.)
5. If family documents should be excluded from productions, select the **Include Entire Family** option.
 **NOTE:** When this option is selected, family documents will be excluded whether or not the "Family" option is set as part of the saved search selected or defined in the following step.¹⁴
6. Either select an existing saved search or click **Build Search** to define and save the needed search. See the *Ipro Eclipse SE Search Reference* for details on using the Advanced Search dialog box.
7. The definition of the search appears in the area below the **Saved Search** selection list. Ensure this is the needed search.
8. Notify administrators about Production Shield and provide instructions about the documents that should not be included in a production job.

Changing or Removing Production Shield

Production Shield can be changed or the protection removed altogether if needed. Productions that have already been completed will not be affected.

- To change the search to be used for Production Shield, complete the previous procedure and select or create a different saved search.
- To remove Production Shield protection, complete the previous procedure and select **NONE** for the saved search.

14. These are public searches that may be used for purposes other than Production Shield and for which family documents should not be included.

Working with Stop Words

About Stop Words

Stop words are common words that are ignored during searches of your Eclipse SE database. Note:

- Eclipse SE includes a base set of 128 stop words.
- Stop words can include up to 10,000 characters. Thus, if the average stop word were 10 characters, you could include up to 1,000 words. Most stop words are shorter, however, so many more can be included if needed.
- Stop words can be revised after a case is created, as explained the following paragraphs.

Significant changes to stop words require that you rebuild search indexes as explained in ["Working with Case Tools"](#) on page 6-40.

Changing Stop Words

To change stop words:

1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Stop Words** tab.
4. Review existing stop words.
5. Click the **Modify Stop Words** button and continue with the following steps as required for your case.




TIPS:

- Scroll if needed to see all words.
- While the cursor is in a column containing a word being added or edited, you can press Ctrl+Z to undo your last action.
- To select all words in a column, right-click in the column and choose **Select All** on the context menu.
- Select a contiguous set of words by double-clicking the first word, then Shift+clicking at the end of the last word of the set.

6. To **add a word** to the list:
 - a. To add a word at the bottom of a column, scroll to the bottom of the column, click under the last word, and enter the word.
 - b. To add a word within a column, locate the word below which you want to add a word, click at the end of the existing word, press ENTER, then enter the new word in the new blank line.
 - c. Repeat for additional words.

Tip: Words can be added in any order; they will be alphabetized after you complete this procedure.
7. To **paste words** from another source:
 - a. Copy needed words from a text source.
 - b. Click in a column in the Modify Stop Words dialog box, then right-click and select **Paste**.
8. To **edit a word** in the list:
 - a. Locate and double-click the word, then enter the correct word.
 - b. Repeat to edit other words.
9. To **delete a word** in the list:
 - a. Locate the word, double-click it, and press the DELETE key.
 - b. Repeat for additional deletions.

Tip: Blank lines are removed after you complete this procedure.
10. To **cut a word** in the list:
 - a. Scroll to locate the word, double-click it, then right-click and select **Cut**.
 - b. Open a file in which the cut word is to be pasted, then press Ctrl+V.
 - c. Repeat to cut additional words.

 **TIP:** Blank lines will be removed by Eclipse SE after you complete this procedure.
11. When stop-word changes are completed, click **OK** in the Modify Stop Words dialog box.

Restore Default Stop Words

To return deleted stop words to the case:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Stop Words** tab.
4. Click the **Modify Stop Words** button.
5. If desired, copy the existing stop words to a text or other file as described in the following procedure.
6. Click the **Load Default Stop Words** button, then click **OK**. Formerly deleted stop words are returned to the list (words *added* by users are *not* removed.)

Copy Stop Words

If desired, you can copy the stop word list to a text or other file. To do so:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Stop Words** tab.
4. Click the **Modify Stop Words** button.
5. Select all or part of a column of words to be copied.



TIPS:

- Select all words in a column by right-clicking in the column and choosing **Select All** on the context menu.
- Select a contiguous set of words by double-clicking the first word, then Shift+clicking the last word of the set.

6. Press Ctrl+C.
7. In a text or similar file, press Ctrl+V.
8. Repeat these steps to copy words in additional columns.
9. When finished, click **OK** or **Cancel** to exit the Modify Stop Word dialog box.

Reviewing/Changing Database Records

The Case Management workspace provides a summary and details for the records in your database on the **Database Records** tab. Evaluate or verify records in a particular case as follows:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Database Records** tab.
4. On the left side of the workspace, select the client and case of interest.
5. Click **List All Records** to see records in the **Documents** list, or click **Build Search** to view specific records. For details on searching, see the *Ipro Eclipse SE Search Reference*.
6. Evaluate records as explained in [Chapter 11](#). Possible activities include:
 - Reviewing the **Documents** list or document details
 - Deleting a document, page, or set of documents
 - Checking/changing file paths
 - Viewing images
7. When finished, continue with other administrative activities.


Configuring Key Words


To assist users in finding key terms in a case, you can configure “key words” to emphasize specific document content. This highlighting appears in Record View plus the **Quick View** and **Extracted Text** tabs in Eclipse SE Desktop. The following example shows terms highlighted in the **Extracted Text** tab. Note that different key words are highlighted differently and that a navigation bar allows users to easily find key words.



Defining Key Words

To define key words for a case:

1. Getting started:
 - a. Before defining key words, analyze review needs and determine the types of key words that will best assist your reviewers and others involved with the case.
 - b. Establish a basic grouping scheme and identify specific key words.
2. Complete "[Getting Started with Changes](#)" on page 6-3.
3. In the Case Management workspace, select the needed client ID and case.
4. Click the **Key Words** tab. (If it is not visible, click  on the right side of the workspace tabs.)
5. Click **Modify Key Words**.



6. In the Modify Key Word Terms dialog box, click .
7. Complete the Key Word Term Highlight dialog box as described in the following table.

Item	Description
Name	Enter a name for the key word group. This name allows easy navigation of key words in Eclipse SE Desktop's Extracted Text or Quick View tabs.
Text Color	Select a color for the text that will be highlighted. Choose a color that provides the best contrast with the highlighting color.
Highlight Color	Select a highlighting color. Choose a color that contrasts well with the text color.
Terms	Enter all terms that belong to this group. Separate terms with a single space or enter each term on a separate line. Note: Each term is considered individually. For example, if you enter the name <i>APB Energy</i> , "APB" and "Energy" will be found and highlighted separately.

8. Review your entries and color selections.
9. When the definition is complete, click **Save**.
10. Repeat these steps for all highlighting groups.
11. When all groups are defined, click **Save** in the Key Word Terms dialog box.
12. Inform users of the availability and use of key word highlighting.



Modifying Key Word Groups

To revise key word group definitions:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Key Words** tab. (If it is not visible, click  on the right side of the workspace tabs.)
4. Click the **Modify Key Words** button.
5. Click a key word group to be changed, then click  and make the needed changes. This includes changing the group name, text or highlight color, or the terms.
6. When changes are complete, click **Save**.
7. Repeat this procedure to change other key word definitions.
8. When finished, click **Save** in the Key Word Terms dialog box.
9. Inform users of the changes and provide instructions as needed.

Deleting Key Word Groups

To delete key word groups:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Key Words** tab. (If it is not visible, click  on the right side of the workspace tabs.)
4. Click the **Modify Key Words** button.
5. Click a key word group to be deleted, then click . Note that the selected key word group will be deleted immediately.
6. Repeat this procedure to delete other key word groups.
7. When finished, click **Save** in the Key Word Terms dialog box.
8. Inform users of the changes and provide instructions as needed.

Managing Coding Forms

Overview

About coding forms

By default, the **Record View** pane and the case table (**Case View**, etc. tabs) in Eclipse SE display all fields in a case. Hundreds of fields may be defined in your cases, while only a few are needed for users to perform a particular task.

Eclipse SE allows you to create various field sets ("coding forms") so that the fields listed on the **Record View** pane and in the case table meet users' needs and allow them to work as efficiently as possible. Coding forms also dictate which tags appear in the **Doc/Page Tags** tabs. They can also specify a sort order for the case table, be limited to specific users, and be coordinated with review passes.

You can specify one or more coding forms as the default form that will appear when a user first opens a case or batch.

In the following example, the "Level 1 Review" form includes just six fields.



Planning

As with many Eclipse SE tasks, proper planning will help ensure that the coding forms you define match needed case review activities.

- **Names:** If several coding forms will be available for users, give some consideration to naming conventions.
- **Fields and tags:** Identify the sets of fields and tags that will best serve case review. Also:
 - Shortcut keys can be defined for fields—if they will be used, plan shortcuts that will be easy for reviewers to use and remember.¹⁵
 - A multi-field sort index can be specified to provide an initial sort order for fields in the case table.
- **Rules:** Determine whether rules should be defined to enforce certain review actions. Basic “if-then” rules can be defined regarding tags, tag groups, and/or fields to enforce record tagging and/or editing requirements. Or, fields, tag groups, and/or tags can simply be defined as required.
- **Date fields:** Determine whether a range of dates should be defined to help reviewers identify errors in and correct DATE fields.
- **Review coordination:** If the completion of certain review activities can indicate completion of a batch review, identify needed rules and review passes that should be coordinated.
- **Security:** Determine whether forms should be restricted to certain users and/or user groups.
- **Default forms:** Decide whether one or more forms should serve as the default form for the case.




Finally, consider the information users will need in order to properly use coding forms and create appropriate case instructions.


Creating New Coding Forms

Review the ["Overview"](#) on page 6-30, then create coding forms for a case as follows:


1. Begin as explained in ["Getting Started with Changes"](#) on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.

15. Shortcuts keys can also be defined for tags (see ["Tag options"](#) on page 5-24). Tag shortcuts can be used case-wide; field shortcuts are specific to coding-forms.


3. Click the **Coding Forms** tab. (If it is not visible, click  on the right side of the workspace tabs.)
4. Click **New Coding Form** and complete the following steps.
5. In the **Coding Form** field, enter a name for the form.
6. **Fields:** Select the fields to be displayed in the coding form (at least one field must be selected):
 - a. Click the **Fields** tab.
 - b. To select all fields, click .
 - c. To select individual fields, double-click each field in the **Available Fields** list.
 - d. To select multiple items, click a field name, then Shift+click or Ctrl+click additional fields to choose a contiguous or non-contiguous set, respectively. When all fields have been selected, click .

 **NOTE:** The EXTRACTEDTEXT field can be added to a coding form, but will not display in Record View. (It *will* display in the case table, which by default, displays the fields defined in the selected coding form.)

7. **Field order:** When needed fields have been selected, organize them in a way to best meet your users' needs:
 - a. In the **Selected Fields** list, click a field to be reordered.
 - b. Click **Up** or **Down** until the field is in the desired location.
 - c. Repeat these steps to reorder other fields.
8. **Tags:**
 - a. In the Coding Forms dialog box, click the **Tags** tab.
 - b. To select all tag groups and tags, click **Select Tags**.
 - c. To select individual tag groups or tags within groups, click the needed groups and/or tags.


 **NOTE:** If a tag group has the Exclusive rule, all tags in the group must be selected.
 - d. If needed, change the order of tag groups by using the **Up/Down** buttons on the **Tags** tab.
9. **Rules:** See "[Define coding form rules](#)" on page 6-35 for details on setting rules as part of your coding form definition.

10. **Security:** If the form should be restricted to certain users or user groups:
 - a. In the Coding Forms dialog box, click the **Security** tab.
 - b. Select needed groups and/or users.

 **NOTE:** This security applies to a coding form when it is accessed from a case. If a coding form is assigned to a review pass, review pass security will take precedence.

11. **Options:** Select other options as described in the following table.


Coding Form Options Tab

Option	Description
Optional Date Range	<p>Complete the following steps to check all DATE fields that appear in the coding form against a specific range of dates. When a range is defined and the coding form is selected in Eclipse SE Desktop, a message will appear in the status bar to alert users when a date is out of range.</p> <ol style="list-style-type: none"> 1. In the Coding Forms dialog box, click the Options tab. 2. Enter Start and End dates for the range. These dates are inclusive. <p> TIP: Enter the dates in any format; Eclipse SE will change the format to match the date format defined for the case if needed.</p>
Default View	<p>To have the coding form being defined serve as the default form for the case, select the Use for Default Case view option on the Options tab of the Coding Form dialog box. When this option is selected, the coding form will display when a user first accesses Eclipse SE Desktop or chooses Default Layout. By default, the fields in the case table will also match this coding form.</p> <p>More than one form can be designated as the default form, because different users may have different access to a specific form. If more than one default form is available for a particular user, then Eclipse SE will use the first available form in the list in Record View as the default.</p>

Coding Form Options Tab (Continued)

Option	Description
Default Sort Index	<p>To specify a default sort order for the case table when the coding form is selected, select the needed multi-field sort index. For details on indexes, see "Managing Multi-Field Sort Indexes" on page 6-38.</p> <p>Users can change field sorting after the coding form is selected; defining a sort index here provides a baseline sort order for the coding form.</p>

12. **Shortcut Keys:** To allow users to use shortcut keys to navigate from one field to another in the coding form, assign the shortcuts as follows:
 - a. In the Coding Forms dialog box, click the **Shortcut Keys** tab.
 - b. Select a field for which a shortcut key is being assigned.
 - c. Select the needed key (1-9, A-Z). When working in the coding form, reviewers will be able to press **Alt+thiskey** to place the cursor in the selected field.
 - d. Repeat steps b and c for all fields for which shortcuts keys are being assigned.
 - e. Review and make a note of the shortcut keys so that you can relay details to reviewers who will be using the coding form.

 **TIP:** A report listing all defined shortcut keys (for coding forms and tags) for all cases is available; see "[Shortcut Keys Report](#)" on page 15-31. For a report specific to a case, see "[Generating Case Management Reports](#)" on page 15-34.
13. When all tabs in the Coding Forms dialog box have been completed, click **Ok**.
14. Repeat this procedure to configure other coding forms.
15. Explain coding form use to reviewers and/or add applicable case instructions.

Define coding form rules

Basic “if-then” rules can be defined regarding document tags, tag groups, and/or fields, to enforce record editing and/or tagging requirements for users working in Record View¹⁶. Or, fields, tag groups, and/or tags can simply be defined as required. Form rules are enforced when a user edits fields in Record View or applies tags while working in a case or a batch. In batches, a user cannot select a new document for review until all rules are met.

Coding forms with rules can also be tied to review passes so that if all rules are met for all batches in a review pass, the status will automatically change to **Reviewed**.

Rule examples:

- If a particular document tag is set, then a particular field (for example, a *Comments* field) is required (cannot be empty).
- At least one tag from a tag group must be applied.

Before you add rules to a coding form, plan the rules and rule sequence to ensure that they will correctly enforce the needed review activities and be conducted in the correct order.

To define a coding form rule:

1. Create a new form (page 6-31) or edit an existing form (page 6-37) to access **Coding Forms** configuration.
2. In the Coding Forms dialog box, click the **Rules tab** and then **Add**. Complete the Edit Coding Form Rule dialog box (shown in the following figure) as described in the following steps.

16. If rules are defined, ensure that users edit fields in Record View, not in the case table.



Edit Coding Form Rule Dialog Box

3. **Name:** Enter a name that describes the rule's purpose.

4. **Rule details:**

IF statement:

- a. Select the item type—**Tag**, **Tag Group**, or **Field**—that is the subject of the "if" portion of the rule.
- b. Select the specific field, tag, or tag group. Note: Only the fields and tag groups/tags that have been added to the form will be available.
- c. Select the needed condition. For example, for tags or tag groups, the conditions are **Tagged** or **Not Tagged**. The condition may also be **Required**.

THEN statement:

- d. If you defined an item to be **Required**, then skip to [step h](#).
- e. For other rules, select the item type—**Tag**, **Tag Group**, or **Field**—to which the "then" portion of the rule applies.
- f. Select the specific field, tag, or tag group.
- g. Select the required condition. For example, for fields, the conditions are must **Empty** or **Not Empty**.
- h. Read the rule statement to ensure it is as intended; make changes if needed.
- i. If the rule should not yet be active, select the **Disable this rule** option.
- j. When finished, click **Ok**.

The following example shows a rule on the **Rules** tab in the Coding Form dialog box. In this example, if the *Date Created* field is empty, then the *Date conf. needed* tag must be applied.







Rule Example

5. Repeat these steps to create other rules.
6. When all rules are defined, review the order of rules in the **Rules** tab of the Coding Form dialog box. Rules are enforced in order from top to bottom.
7. If the order of rules should be changed:
 - a. Select a rule to be reordered.
 - b. Click **Up** or **Down** until the rule is in the desired location.
 - c. Repeat these steps to reorder other rules.
8. Define or revise other aspects of the coding form as needed, then click **Ok**.

Modifying Coding Forms

To revise or delete an existing coding form:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Coding Forms** tab. (If it is not visible, click  on the right side of the workspace tabs.)
4. To **revise** a coding form, click its  button. Make needed changes (fields, tags, rules, and/or security) in the Coding Forms dialog box. Refer to "[Creating New Coding Forms](#)" on page 6-31 for details on coding form options.
 **NOTE:** Fields, tags, and tag groups that are part of a rule(s) cannot be deleted.
5. To **delete** a coding form, click its , then click **Yes** in response to the confirmation message.
6. Notify users of the changes that have been made.

Managing Multi-Field Sort Indexes

Creating Multi-Field Sort Indexes

Indexes can be created to provide pre-defined multi-field sorting of the case table in the Eclipse SE Desktop. Defining such indexes allows case table data to be organized by primary, secondary, and additional subordinate groupings of data. For example, it may be useful for users to have all records grouped by the Author field and each group sorted by date as shown in this example.

To create an index for multi-field sorting:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Indexes** tab. (If it is not visible, click on the right side of the workspace tabs.)
4. Click **New Index**.
5. **Fields to sort:** For each field to be sorted, click the option box, , in the **Available Fields** list.
6. **Sort order:** By default, data will be sorted in ascending order (smallest or lowest value first). Alternatively, it can be sorted in descending order (largest or highest value first). To change the sort order for one or more fields:
 - a. Click a field name (not its option box) in the **Index Fields** list and click **Sort**. The field order will change from its current sort order (**Ascending** to **Descending** or vice versa).
 - b. Repeat this step for other fields to change the sort order.



7. **Field-sorting precedence:** In the **Index Fields** list, the topmost field will be sorted first, the next field will be sorted second, and so on. To change the sorting precedence:
 - a. Click a field name (not its option box) and click the **Up** or **Down** to move the field to the needed location.
 - b. Repeat this step to move other fields, until fields are in the needed order.
8. When finished, click **Apply**.
9. In the **Indexes** tab, click **Rebuild Indexes**.
10. Inform users of the name and organization of this sort index. They will be able to select it when working in the case table (**Case View** or related tab) in the Eclipse SE Desktop. Users may need to refresh or re-open the case to see a new index.

Modifying Multi-Field Sort Indexes

To revise or delete an existing index:

1. Begin as explained in "[Getting Started with Changes](#)" on page 6-3.
2. In the Case Management workspace, select the needed client ID and case.
3. Click the **Indexes** tab. (If it is not visible, click on the right side of the workspace tabs.)
4. To **revise** an index:
 - a. Click the corresponding button. Make needed changes (name, fields, sort order, sorting precedence) in the Multi-Field Sort Index dialog box. Refer to "[Creating Multi-Field Sort Indexes](#)" on page 6-38 for details on index options.
 - b. When finished, click **Apply**.
 - c. In the **Indexes** tab, click **Rebuild Indexes**.
5. To **delete** an index, click its , then click **Yes** in response to the confirmation message.
6. Notify users of the changes that have been made.

Other Case Management Activities

Using Eclipse SE Reports

Reports that can help you evaluate case details are available in the Case Management **Reports** tab.

For details on working with these reports, see "[Using Case Management Reports](#)" on page 15-32 in the chapter on reports. The chapter also explains additional reports available in Eclipse SE Administration.

Using Transcripts

Case-related transcripts can be imported and managed using the Case Management **Transcripts** tab.

For details on working with transcripts, see [Chapter 10](#). The chapter explains how to import transcripts, organize them by type, and define transcript issues.

Working with Case Tools

Eclipse SE offers a variety of tools that can help you maintain the integrity of your case databases and efficiently perform various administrative tasks. See [Chapter 6](#) for details on case utilities.

7 Working with Case Tools

In this Chapter

Overview	7-2
About Case Tools	7-2
Case Utilities	7-2
Global Activities	7-3
Path Management.....	7-4
Scheduling	7-4
Privileges required	7-4
Index Maintenance	7-5
Rebuilding Indexes	7-5
Flushing an Index	7-6
Repairing Case Databases	7-7
Backing Up/Archiving and Restoring Case Data	7-8
Overview	7-8
Backing Up Case Data	7-8
Restoring a Backup	7-9
Removing a Backup	7-10
Tagging Multiple Documents (Bulk Tagging)	7-11
Globally Search and Replace Field Data	7-13
About Global Replace	7-13
Performing Global Replace	7-13
Globally Check Spelling	7-17
Normalizing Data	7-22
Managing Files Paths and System Fields	7-26
About Path and Field Management	7-26
Validating Paths and Fields	7-27
Managing Volumes.....	7-28
Updating File Paths	7-31

Overview

About Case Tools

Eclipse SE offers a variety of tools to help you maintain the integrity of your case databases and efficiently perform various administrative tasks.



Case Utilities

Index maintenance

One of the main purposes of case utilities is to maintain the accuracy of the indexes used for searching. Search indexes can initially be created as part of the import process. The indexing step may have been skipped when data was first imported (for example, to save time).

Various case changes require that an index be rebuilt, such as:

- Importing additional data
- Changing some aspects of the case definition
- Changing database field definitions
- Removing tags (which requires tags to be removed from all records first)
- Changing stop words

In addition, certain product upgrades may require that indexes be rebuilt.

Database repair

Eclipse SE includes many different databases, some of which may become damaged and need repair. Databases that can be repaired include:

- Administrative databases
- Case databases
- Case review databases

Backup/restore

It is easy to back up case data in Eclipse SE, either as part of a routine backup process or for archiving purposes. If needed, data can be restored after it is backed up.

Bulk tagging

Eclipse SE provides a way for you to efficiently apply one or more tags to multiple documents at once. You can bulk tag the entire database or a range of documents.

Global Activities

Eclipse SE Administration offers three features that allow administrators to correct and standardize field data for an entire case, a specific range of documents, or for documents matching specific search criteria:

- Search and replace
- Spell check
- Data normalization

Search and replace

Administrators can find and replace field data. Options allow any of the following activities:

- Replace field content completely
- Append or prepend text to field content
- Replace specific field details (word, phrase, etc.)
- Copy or move content from one field to another

Spell check

Administrators can check spelling and make corrections for all selected documents.

Data normalization

Administrators can review field data to standardize terms, names, and other data as needed.

For example, an Author field may have several variations of the name “John Smith” (John Smith; Smith, John; J.E. Smith, etc.). Use the Data Normalization feature to change the name to a common presentation.

Path Management

Image and native file paths

Eclipse SE provides a straightforward way to check and correct the path information in your case (image, native, and/or production image paths).

In addition, Eclipse SE checks and updates field and file sizes and details automatically to match the current case content.

Volumes

Volumes are user-defined variables representing the paths where image files are located. Volumes provide an efficient way to define and manage image file paths, and Eclipse SE provides the tools needed for volume management.

Scheduling



Depending on the size of the database, system capabilities, and other factors, global functions may consume significant system resources and time. Eclipse SE performance may be affected.

It is recommended that you carry out major global functions during “off hours” to minimize the impact to the system and your users. For example, schedule activities at the end of the work day or on the weekend. Notify users who may work at these times of possible interruptions.

All users should be logged out of affected cases (in all Eclipse SE components) when you repair the database.

Privileges required

Super Administrators can use all tools for any case. Case Administrators can perform most activities for the cases to which they are assigned.

Index Maintenance

Rebuilding Indexes

Rebuilding an index is the process of recreating it "from scratch. The following indexes can be rebuilt for Ipro cases:

- Full-text (Words and phrases in the indexed fields of Eclipse SE. All text fields are indexed by default.)
- Transcripts associated with a case
- Sticky Notes or Embedded Text added to images

To fully rebuild one or more indexes:

1. Getting started:
 - a. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time to rebuild your indexes.
 - b. If users might be logged on, alert them that performance may be affected while you rebuild the indexes. You may also require that users log off, depending on the size and complexity of your databases.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. In the Case Utilities workspace, select the case(s) for which indexes are to be rebuilt.
5. On the **Rebuild Index** tab, select the indexes to be rebuilt, then click **Rebuild**. Observe status on the bottom of the workspace.

Flushing an Index

Over time, database changes cause indexes to become fragmented. Flushing an index condenses/optimizes the index for improved performance.

To flush one or more case indexes:

1. Getting started:
 - a. Review the discussion of "[Scheduling](#)" on page [7-4](#) and select an appropriate time to rebuild your indexes.
 - b. If users might be logged on, alert them that performance may be affected while you flush the indexes. You may also require that users log off, depending on the size and complexity of your databases.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. In the Case Utilities workspace, select the case(s) for which indexes are to be flushed.
5. Click the **Flush Index** tab and choose the needed indexes:
 - Document Full Text Index
 - Sticky Notes Index
 - Embedded Text Index
6. Click **Flush** and observe status on the bottom of the workspace.

Repairing Case Databases

When unexpected errors occur in cases during normal operation (for example, you receive messages such as "Unable to get/save record"), run the repair operation on the affected database. These include:

- Administrative databases
- Case databases
- Case review databases

To repair a database(s):

1. Getting started:
 - a. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time for repair activities.
 - b. Identify the types of repairs required. Review the figure below if needed.
 - c. Ensure that *all* users are logged out of the case(s) to be repaired for all Eclipse SE components (Eclipse SE Desktop, Administration and any other instances of the Eclipse SE Database Utility.)
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. In the Case Utilities workspace, select the case(s) for which repair is needed.
5. Click the **Repair** tab and select needed options.
6. Click **Repair** and observe status on the bottom of the workspace.
7. When finished, alert users that they may resume work.

Admin Databases	Case Databases		Case Review Databases
<input type="checkbox"/> Select All	<input type="checkbox"/> Select All	<input type="checkbox"/> Repair Volume Master	<input type="checkbox"/> Select All
<input type="checkbox"/> Repair User Security	<input type="checkbox"/> Repair Main Database	<input type="checkbox"/> Repair Production Master	<input type="checkbox"/> Repair Review Master
<input type="checkbox"/> Repair Group Security	<input type="checkbox"/> Repair Tag Definitions	<input type="checkbox"/> Repair Production History	<input type="checkbox"/> Repair Batch Master
<input type="checkbox"/> Repair Case Master	<input type="checkbox"/> Repair Document Tag Master	<input type="checkbox"/> Repair Tag Conflicts	<input type="checkbox"/> Repair Batch Detail
<input type="checkbox"/> Repair Client Master	<input type="checkbox"/> Repair Page Tag Master	<input type="checkbox"/> Repair Document History	
<input type="checkbox"/> Repair User Batch Master	<input type="checkbox"/> Repair Annotation Master	<input type="checkbox"/> Repair Page History	
<input type="checkbox"/> Repair Session Database	<input type="checkbox"/> Repair Page Master	<input type="checkbox"/> Repair Import Jobs Database	
		<input type="checkbox"/> Repair Transcript Databases	

Repair Options

Backing Up/Archiving and Restoring Case Data

Overview

Eclipse SE provides an easy way for you to back up case data, either as part of a routine backup process or for archiving purposes. If needed, data can be restored after it is backed up.

Each time you perform a backup, case data is saved and time-stamped, providing “snapshots” of the data for each date/time.

Eclipse SE recommends the following:


- Back up case data on a routine basis, per company policy or backup best practices.
- Definitely back up data before doing any heavy/intensive data manipulation such as importing large load files or deleting large document ranges.
- Separately back up all case files (image, native, text) using your company’s file backup procedures.
- When review of a case is completed, back up the data and archive it.

Backing Up Case Data

To back up case data:

1. Preparation:
 - a. Review "[Scheduling](#)" on page 7-4 and select an appropriate time for backup activities.
 - b. Ensure that all users are logged out of the case(s) to be backed up (in both Eclipse SE Desktop and Administration).
 - c. Make sure the backup location has sufficient space.

Backup files are compressed to conserve space; in general, free space in your backup location should be at least 30% of the size of the case’s data directory. (For example, if the case data directory is 100 MB, then your backup location should have at least 30 MB of free space).
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. In the Case Utilities workspace’s **Cases** list, select (click the option box for) one or more cases to be backed up.
5. Click the **Archive/Backup** tab.

6. Check the **Archive Location**—by default, the path will be the last location used. To change this path, enter or click  to navigate to, the needed location.



NOTE: Changing the location will not move existing backup folders; it will place the current backup in the new location.

7. Click **Backup**. Eclipse SE checks the free space of the selected location. If available space is not at least 30% of the size of the selected case(s), a message displays. You can proceed (click **Yes**), but it is recommended that you cancel (click **No**) and select a different location that has the needed free space. The case size (in bytes) is shown in the **Status** area of the tab.
8. Watch progress in the **Status** field. The amount of time required depends on case sizes and number of cases selected.

A success message displays in the **Status** field when the backup is complete and the job is added to the backup list.

Backup files are placed in a folder named as follows:

CaseName_YYYYMMDD_hhmmss_bk, where:

CaseName is the name of the case.

YYYYMMDD is the date of the backup (year, month, day).

hhmmss is the time of the backup in 24-hour format (hour, minutes, seconds).

_bk is a suffix indicating "backup."

9. If needed, repeat this procedure to back up other cases.

Restoring a Backup

Should it be necessary to restore a backup, complete the following steps:

1. Preparation:
 - a. Review "[Scheduling](#)" on page 7-4 and select an appropriate time to perform the restore.
 - b. Ensure that all users are logged out of the case(s) to be restored (in both Eclipse SE Desktop and Administration).
2. In Eclipse SE Administration, click the **Case Management** tab.

3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. Click the **Archive/Backup** tab.
5. In the list of backups, select the one to be restored. If multiple backups exist, ensure the correct one is selected. Backups are listed in order by case name and secondarily by backup date.
6. Click **Restore**. A message will suggest that you back up the case before restoring it.
7. To back up the case before you restore a previous version, click **Yes**. To skip this step, click **No**.
8. Watch progress in the **Status** field. The amount of time required depends on the size of the case.

A success message displays in this field when the restoration is complete. All field data is overwritten with backup data, including "blanks" for fields containing no data in the backup.
9. Click **Case Management** in the navigation panel; a message displays informing you that case indexes need to be rebuilt. Click **Yes** to re-index the case now or **No** to do so at a later time.
10. If needed, repeat this procedure to restore other cases.

Removing a Backup

If you no longer need a backup, remove it as follows:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
3. Click the **Archive/Backup** tab.
4. In the list of backups, select the backup to be removed. If multiple backups exist, ensure the correct one is selected. Backups are listed in order by case name and secondarily by backup date.
5. Click **Remove**.

6. In response to the warning message, click **Yes**.
7. Watch progress in the **Status** field. A success message displays in this field when the removal is complete. The backup folder and all files are removed.
8. If needed, repeat this procedure to remove other cases.

Tagging Multiple Documents (Bulk Tagging)

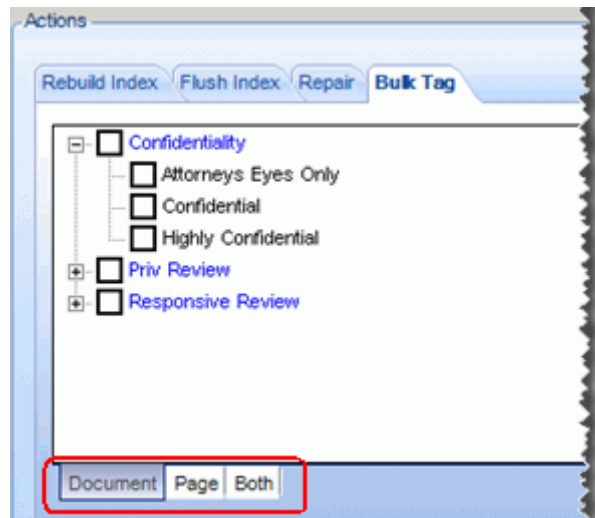
Bulk tagging allows you to efficiently apply tags to (or remove tags from) a large range of documents, pages, or an entire case.



NOTE: Applying tags in this way does not include tagging of related documents. Also, previously applied exclusive tags will be changed without notice. (For example, if the exclusive tag "Yes" has been previously applied to a document, applying "No" through bulk tagging will change the tag automatically.)

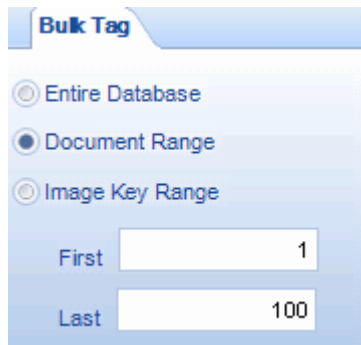
To use bulk tagging:

1. Getting started:
 - a. Identify the case, tag(s), and documents needed for this procedure.
 - b. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time to perform bulk tagging.
 - c. If users might be logged on, alert them that performance may be affected while you perform bulk tagging.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Case Utilities**.
4. In the Case Utilities workspace, select one case for which bulk tagging is needed.
5. Click the **Bulk Tag** tab.
6. Click the tab corresponding to the types of tags to be applied: **Document**, **Page**, or **Both** as shown in the following figure.



Bulk Tagging - Selecting Tags

7. In the list of tags, select the tag(s) to be added or removed.
8. Choose the documents to be tagged:
 - **Entire Database** (case)
 - **Document Range**
 - **Image Key Range**
9. For document or image key range, in the **First** and **Last** fields, enter the range of documents or image keys to be tagged (or untagged). The following figure shows that the first 100 documents will be tagged.



10. Click **Tag** (apply tags to) or **Untag** (remove tags from) the selected documents and/or pages.
11. Click **OK** in response to the confirmation message and observe the status in the bottom pane.

Globally Search and Replace Field Data

About Global Replace

Although fields can be edited in Eclipse SE Desktop, if more than a few records need to have field data replaced in the same way, use the Eclipse SE **Global Replace** function. This function is essentially the same in both Eclipse SE Administration and the Desktop; it provides an efficient way to change the content of one or more fields in multiple records.

This function cannot be used for the following types of fields: BEGATTACH, BEGDOC, DOCKEY, EXTRACTED TEXT, or any field that is defined with the **Primary Key** flag. Also, if field-level security is set, **Global Replace** cannot be used for restricted fields.

Performing Global Replace



NOTE: When replacing data, ensure that you know the type of field for which data will be replaced and that the replacement data is correct for the type. For example, if a field is NUMERIC, use only numeric data. Or, if a field has a control list, the **Search For** and **Replace With** entries must match control list items exactly.

To search for and replace data in one or more fields in an Eclipse SE case:

1. Getting started:
 - a. Identify needed information, including scope of the action (entire case, specific range, etc.), affected fields, and what the "search" text and "replace" text should be.




TIP: It may be useful create and save a search to define the needed documents before you continue. If the documents are diverse from a search standpoint, one approach is to place them all in a private folder in Eclipse SE Desktop and then search for documents in the folder.

- b. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time to make global changes.
 - c. If users might be logged on, alert them that performance may be affected while you perform this bulk operation.
2. In Eclipse SE Administration, click the **Case Management** tab.

3. In the navigation panel, expand the **Client/Case Management** menu and click **Global Search and Replace**.
4. Select the needed client and case.
5. Select the scope of the operation as explained in the following table.







Global Replace Scope Options

Option	Description
Entire Case	Select this option to make changes throughout the entire case.
Image Key Range	<ol style="list-style-type: none"> 1. Select this option to limit changes to a specific range of documents. 2. Enter the starting and ending image key numbers in the corresponding Start Image Key/End Image Key fields. Or, click  and select the needed image key(s).
Advanced Search	<ol style="list-style-type: none"> 1. Select this option to limit changes to documents meeting specific search criteria. 2. Click Build Search, then create and run the search. The number of affected documents will be listed in the Advanced Search area. For details on searching, see the <i>Ipro Eclipse SE Search Reference</i>.
Saved Search	<ol style="list-style-type: none"> 1. If saved searches exist in the case, select this option to limit changes to documents meeting the criteria of one of the saved searches. 2. Select the needed search.

6. Select the type of replacement as listed in the following table, then continue with the applicable steps (following the table) to select options and complete your replacement definition.

Global Replace - Replacement Options

Option	Action
Replace Entire Field with Text	<p>Select this option to replace all content in selected fields (regardless of what the content is).</p> <p>Example: A field specifying the path for native files may contain several entries. Select this option to replace all existing paths with one path.</p>
Append Text to End of Field	<p>Select this option to add text to the end of the content in selected field(s).</p> <p>Example: Native files may have been moved to a subfolder within a specified path. Use this option to add the subfolder to the path.</p>
Prepend Text to Beginning of Field	<p>Select this option to add text at the beginning of the content in selected field(s).</p> <p>Example: The relative path for e-mail documents may include a prefix that is missing for selected records. Use this option to add the prefix to the relative path.</p>
Delete Data in Field	<p>Select this option to remove all data for the selected field(s).</p> <p>Example: An attorney began adding notes into the wrong field and did not follow review guidelines for the notes. It will be most efficient to delete all data in the field and allow the attorney to begin again.</p>
Search/Replace	<p>Find and replace specific text within a field.</p> <p>Example: Someone's name may be entered differently in an Author field (such as "A. Smith" and "Adam Smith.") Use this option to search for and replace one version of the name with the other for improved data consistency.</p>
Replace Field	<p>Copy or move data from one field to another.</p> <p>Example: Load-file data was mapped to the wrong field when the data was imported. For example, copy the Author field to Sender field.</p>

7. For all choices in [step 6](#) except **Replace Field**, select the field(s) containing the data to be replaced and click . Note:
 - Use Shift+click or Ctrl+click to select a contiguous or noncontiguous set of fields, respectively.
 - To select all fields, click .
 - To remove one or more fields from the **Selected Fields** column, click  or .
8. For the **Replace Entire Field**, **Append**, or **Prepend** options:
 - a. In the **Text** field, enter the text to be used to replace, append, or prepend the field content.
 - b. If appending or prepending text, check the default **Delimiter** and change or delete it if needed. This delimiter is added *before* text that is appended or *after* text that is prepended.
 - c. Skip to [step 11](#).
 -  **TIP:** If you are prepending information to a path, either clear the **Delimiter** field and include needed slash or backslash in the **Text** field, or enter the slash or backslash as the **Delimiter**.
9. For the **Search/Replace** option:
 - a. In the **Search For** field, enter the text to be replaced.
 - b. In the **Replace With** field, enter the replacement text.
 - c. As needed, select or clear associated options:
 - ♦ **Match Entire Word:** Replace whole words only.
 - ♦ **Ignore Case:** Replace term regardless of the case used (upper- or lowercase).
 -  **TIP:** To add text to fields that are blank (empty), leave the **Search For** field blank.
 - d. Skip to [step 11](#).
10. For the **Replace Field** option, select the type of replacement:
 - **Copy:** Content in the selected **Copy From** field will be copied into the **Copy To** field.
 - **Move:** Content from the selected **Copy From** field will be moved to the **Copy To** field.
11. Review entries and click **Start**; if a warning message displays, click **Yes**.

12. After the operation completes, check results either in Eclipse SE Desktop or the Administration's **Case Management Database Records** tab.
13. Search/replace changes may require that the case be re-indexed. If so, a message will display, asking you whether to re-index now. Click **OK** to re-index when asked, or **Cancel** to do so at a later time.



NOTE: To minimize the impact to the system and user interruptions, it is recommended that cases be re-indexed during "off hours." If you do not re-index the case now, plan a time re-indexing as explained in "[Rebuilding Indexes](#)" on page 7-5.

Globally Check Spelling

Although spelling is checked in Eclipse SE Desktop for fields defined with the spell-check option, corrections can be made for only one record/field at a time. Eclipse SE Administration allows you to check multiple SINGLE_ and MULTI_VALUE fields at once, evaluate spelling issues, and make corrections across selected fields.


To check spelling in multiple fields and documents in a case:

1. Getting started:
 - a. Identify needed information, including the case, scope of the action (entire case, specific range, etc.), and which fields should be checked.
 - b. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time to make global changes.
 - c. If users might be logged on, alert them that performance may be affected while you perform this bulk operation.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Global Spell Check**.
4. Select the needed client and case.
5. Select the scope of the operation from the following options:

Spell-Check Scope Options

Option	Description
Entire Case	Select this option to make changes throughout the entire case.

Spell-Check Scope Options (Continued)

Option	Description
Image Key Range	<p>Select this option to limit changes to a specific range of documents.</p> <p>Enter the starting and ending image key numbers in the corresponding Start Image Key/End Image Key fields.</p> <p>Or, click  and select the needed image key(s).</p>
Advanced Search	<ol style="list-style-type: none"> 1. Select this option to limit changes to documents meeting specific search criteria. 2. Click Build Search, then create and run the search. The number of affected documents will be listed in the Advanced Search area. For details on searching, see the <i>Ipro Eclipse SE Search Reference</i>.
Saved Search	<ol style="list-style-type: none"> 1. If saved searches exist in the case, select this option to limit changes to documents meeting the criteria of one of the saved searches. 2. Select the needed search.

6. Select the fields to be checked; either choose the **Select All Fields** option for all fields or click individual fields of interest. Scroll horizontally to access the complete list of fields.
7. After fields are selected, click **Start**.
8. If checking an entire case, click **OK** in response to the warning message. Eclipse SE checks the content of all selected fields against the spell-check dictionary.




NOTE: The amount of time required depends on the size of the case, number of fields selected, system resources, and other factors.

Words not in the dictionary, as well as the number of instances of each word, are listed in the **Summary Items** area, as shown in the following figure.

Word	Count	Replacement Value
<input type="checkbox"/> AcDiThLq	3	
<input type="checkbox"/> AcDkt	3	
<input type="checkbox"/> ajohnson	6	
<input type="checkbox"/> ARowling	86	
<input type="checkbox"/> Bajolle	3	
<input type="checkbox"/> Parklaw	1	

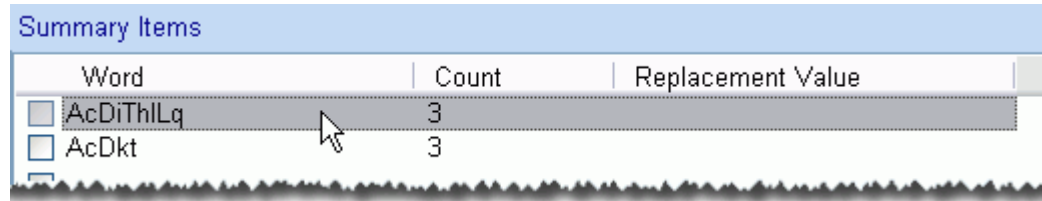
Spell-Check Results Example

9. Complete any of the following steps to make corrections.
10. To **navigate** through the **Summary Items** list, use either of the following methods:
 - Scroll bar
 - Navigation toolbar at the bottom of the workspace
 - PgUp/PgDn and Home/End keys
11. To **change all instances** of a misspelled word in the same way:
 - a. Double-click the word (or click its option box).
 - b. In the Spell Check dialog box, enter or select the replacement term in the **Replace with** field. Click  to view suggested replacements.
 - c. Click **OK**.
12. To **add a word** to the spell-check dictionary:
 - a. Double-click the word.
 - b. In the Spell Check dialog box, make sure the **Replace with field** is blank.
 - c. Select the **Add word to dictionary option** and click **OK**.



NOTE: The spell-check dictionary is not case-specific. Adding a word to the dictionary adds it for any combination of upper- and lowercase letters.

13. To **evaluate/correct individual fields and documents** containing a misspelled word:
 - a. Click the word (not its option box), as shown in the following figure.

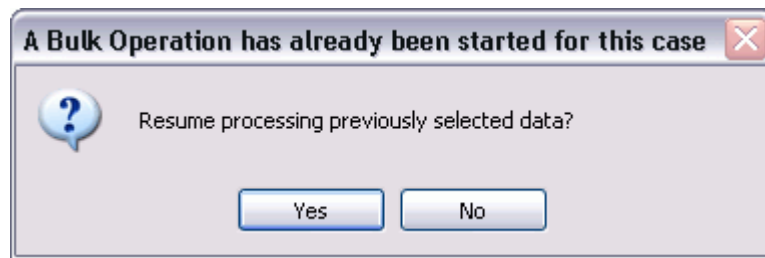


Word	Count	Replacement Value
<input type="checkbox"/> AcDiThlLq	3	
<input type="checkbox"/> AcDkt	3	

- b. Click **View Detail for selected item**.
 - c. In the Detailed View dialog box, note the image key (BegDoc), the field, the misspelled word, and the field detail.
 - d. Scroll in the field detail until you see the misspelled word (in red). Scroll through all text to find other instances.
 - e. Evaluate the context and enter or select a replacement word for the current document.
 - f. Click **Commit**.
 - g. Click **Find Next** to evaluate the next field/document.
 - h. Repeat steps c - f to evaluate and correct the word in the next field or document. This may be the same or a different change from previous fields/documents.
 - i. To leave the word unchanged in a document, simply click **Find Next**.
 - j. When all documents containing the misspelled word have been corrected, click **Done**.
14. Repeat needed steps for all entries in the **Summary Items** list to be changed.
15. Review corrections in the **Replacement Value** column; make further changes if needed.
16. When finished, implement all uncommitted changes by clicking **Commit Bulk Changes**. (Changes committed in [step 13](#) are implemented during that procedure.)
17. Click **Finish**.



TIP: If you need to quit working in the Global Spell Check workspace before all terms have been checked and corrected, you can do so without losing work. When you return to the workspace and select the same client and case, you will be asked whether to resume processing:



- To continue the spell-check, click **Yes**.
- To discard changes and start over, click **No**.

Normalizing Data


Administrators can review multiple SINGLE_ and MULTI_VALUE fields to standardize words, names, and other data as needed.

For example, an Author field may have several variations of the name "John Smith" (John Smith; Smith, John; or John Ray Smith). Use the Data Normalization feature to change the name to a common presentation.

To normalize data throughout a case:

1. Getting started:
 - a. Identify needed information, including the case, scope of the action (entire case, specific range, etc.), which fields should be checked, and data normalization guidelines.
 - b. Review the discussion of "Scheduling" on page 7-4 and select an appropriate time to make global changes.
 - c. If users might be logged on, alert them that performance may be affected while you perform this bulk operation.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Data Normalization**.
4. Select the needed client and case.
5. Select the scope of the operation as listed in the following table.

Data Normalization Scope Options

Option	Description
Entire Case	Select this option to make changes throughout the entire case.
Image Key Range	<ol style="list-style-type: none"> 1. Select this option to limit changes to a specific range of documents. 2. Enter the starting and ending image key numbers in the corresponding Start Image Key/End Image Key fields. Or, click  and select the needed image key(s).

Data Normalization Scope Options (Continued)

Option	Description
Advanced Search	<ol style="list-style-type: none"> 1. Select this option to limit changes to documents meeting specific search criteria. 2. Click Build Search, then create and run the search. The number of affected documents will be listed in the Advanced Search area. For details on searching, see the <i>Ipro Eclipse SE Search Reference</i>.
Saved Search	<ol style="list-style-type: none"> 1. If saved searches exist in the case, select this option to limit changes to documents meeting the criteria of one of the saved searches. 2. Select the needed search.

6. Select the fields to be checked; either choose the **Select All Fields** option for all fields or click individual fields of interest. Scroll horizontally to access the complete list of fields.
7. After fields are selected, click **Start**.
8. If checking an entire case, click **OK** in response to the warning message. Eclipse SE checks the content of all selected fields.



NOTE: The amount of time required depends on the size of the case, number of fields selected, system resources, and other factors.

All words found in the selected fields will be included in the **Summary Items** list, as well as the number of instances (count) of each unique word, as shown in the following figure.

Summary Items	
Word	Count
<input type="checkbox"/> John James Smith	19
<input type="checkbox"/> John R Smith	1
<input type="checkbox"/> John Ray Smith	11
<input type="checkbox"/> JOhn Smith	12
<input type="checkbox"/> John Smithh	1
<input type="checkbox"/> john smmith	2
<input type="checkbox"/> John W Smith	5
<input type="checkbox"/> Pat Conrol	1
<input type="checkbox"/> Pat Conroy	9
<input type="checkbox"/> Pat Controy	1
<input type="checkbox"/> Rowling	1
<input type="checkbox"/> Smith, John	16

Data Normalization Results Example

In this example, several variations of the name "John Smith" exist, including order of first and last names, whether or not a middle initial or name is included, capitalization, and misspellings.

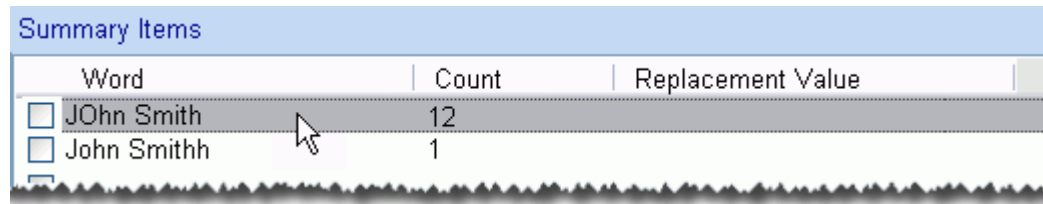


NOTE: Eclipse SE does not distinguish different capitalizations of a single word. All capitalizations of a word are counted together, and the presentation in the **Summary Items** list is based on the first instance of the word (in order by image key).

If capitalization is important to you, and you know that inconsistencies exist, you can change all occurrences to the preferred presentation ([step 11](#)) or view details for the word and make changes selectively ([step 12](#)).

9. Complete any of the following steps to normalize the data in your case.
10. To **navigate** through the **Summary Items** list, use either of the following methods:
 - Scroll bar
 - Navigation toolbar at the bottom of the workspace
 - PgUp/PgDn and Home/End keys

11. To **change all instances** of a word in the same way:
 - a. Double-click the word (or click its option box).
 - b. In the Enter replacement for dialog box, enter the needed replacement.
 - c. Click **OK**.
12. To **evaluate/change individual instances** of a word:
 - a. Click the word (not its option box), as shown in the following figure:

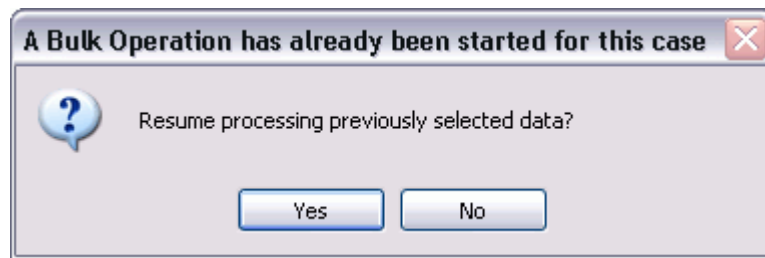


Word	Count	Replacement Value
<input type="checkbox"/> JOhn Smith	12	
<input type="checkbox"/> John Smithh	1	

- b. Click **View Detail for selected item**.
 - c. In the Detailed View dialog box, note the image key (BegDoc), the field, the word, and the field detail.
 - d. Note the presentation of the word (in **red**).
 - e. Evaluate the context and enter the replacement value for the current field/document.
 - f. Click **Commit**.
 - g. Click **Find Next** to evaluate the next field/document.
 - h. Repeat [step c - g](#) to evaluate and change all instances of the word in all fields/documents.
 - i. To leave the word unchanged, simply click **Find Next**.
 - j. When all fields and documents containing the selected word have been changed, click **Done**.
13. Repeat needed steps for all entries in the **Summary Items** list to be changed.
14. Review changes in the **Replacement Value** column; make further changes if needed.
15. When finished, implement all uncommitted changes by clicking **Commit Bulk Changes**. (Changes committed in [step 12](#) are implemented during that procedure.)
16. Click **Finish**.



TIP: If you need to quit working in the Data Normalization workspace before all terms have been checked and corrected, you can do so without losing work. When you return to the workspace and select the same client and case, you will be asked whether to resume processing:



- To continue with data normalization, click **Yes**.
- To discard changes and start over, click **No**.

Managing Files Paths and System Fields

About Path and Field Management

Eclipse SE allows you to validate image, native, and/or production image file paths defined in cases. It also allows you to check for the existence of the following system fields and update field contents:

- Extracted text size (TEXT_SIZE)
- Native file extension (FILE_EXT)^{17, 18}
- Native file type (FILE_ID)¹⁸
- Hash values (MD5_HASH and SHA1_HASH)¹⁸
- Document image count (IMAGECNT)
- Document's ending page (ENDDOC)

If any of the fields you select for validation is missing (or no values exist), you will be alerted so that the field(s) can be added/updated.

For details on these fields, see "[About Eclipse SE database fields](#)" on page 5-12.

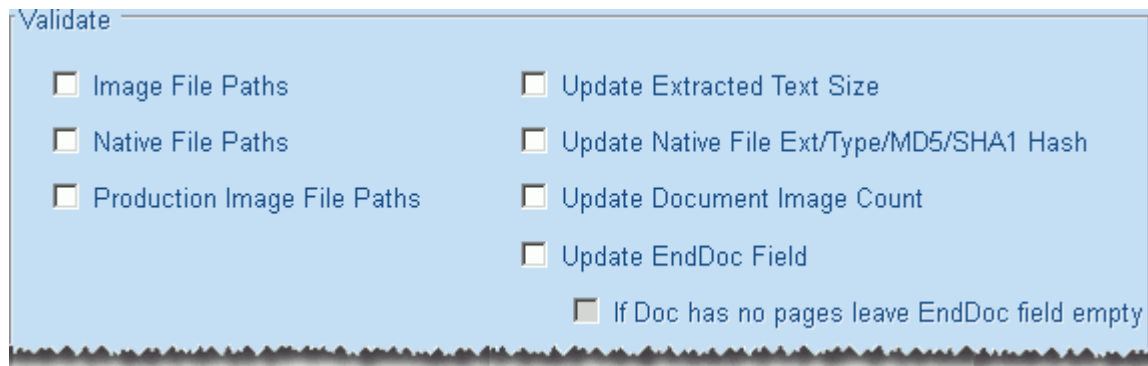
17. FILE_EXT was named "FILETYPE" in earlier releases.

18. One option governs the update of these four fields.

Validating Paths and Fields

To validate files paths and/or check/update fields:

1. Getting started:
 - a. Identify needed information, including case and items to be checked/updated.
 - b. Review the discussion of "[Scheduling](#)" on page 7-4 and select an appropriate time to make global changes.
 - c. If users might be logged on, alert them that performance may be affected while you perform this operation.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Validate Image/Native File Paths** in the **Case Tools** area.
4. Select the needed client and case.
5. Select the items to be validated and/or updated:



NOTE: If your case includes documents lacking images (thus they have no pages) and you select **Update EndDoc Field**, you have the option to leave the ENDDOC field empty (by default it includes the BEGDOC value for such documents). Select or clear the secondary option as needed.

6. Check the log file location; if needed, enter or click **Browse** and navigate to/select a different path and/or file name.
7. Click **Start**. Eclipse SE begins the validation and/or update.
8. If any system fields are missing, Eclipse SE prompts you to add them. In response to the warning message, click **Yes**.

9. After the validation completes, note whether or not errors exist. This figure shows error details in the Validate Image/ Native File Paths workspace.



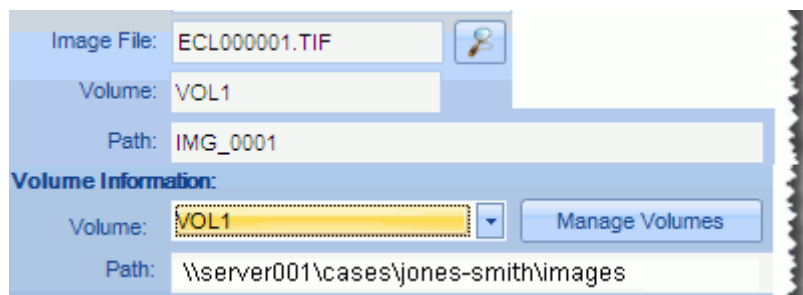
10. If errors are indicated, open the log file (in Windows Explorer) and evaluate error details so that problems can be corrected.

Managing Volumes

About volumes

Image volumes

Ipro highly recommends the use of volumes, which are user-defined variables representing the paths where image files are located. Volumes provide an efficient way to define and manage case image files. The following figure shows the use of a volume as seen in the Case Management workspace's **Database Records** tab¹⁹:



Production volumes

Eclipse SE creates volumes automatically for production jobs. This action makes it easy for you to change the location of production files, should this be necessary. (For example, if a server becomes full, you might need to copy production files to a new location).

Use the following procedures to manage volumes for both images and production files.

19. For details on the volume information, see ["Checking the Image File Path"](#) on page 11-5.

Create a new volume

To create a new volume to define the location of case images:

1. Getting started: Identify needed information, including full UNC path and volume name.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Manage Volumes/Paths**.
4. In the Manage Volume Paths workspace, select the needed client and case.
5. Click **Create New Volume**.
6. Enter a volume name and click **OK**. For example, VOL1.
7. Enter the path (using UNC syntax) and click **OK**. For example, \\SERVER001\CASES, not D:\CASES.




NOTE: Make sure you enter the correct path; it is not validated during this process.

8. Repeat these steps to create additional volumes.
9. When finished, click **OK**.

Change path for existing volumes

To change the path of existing volumes (for either images or production files):

1. Getting started: Identify needed information, including needed path and volume name.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Manage Volumes/Paths**.
4. In the Manage Volume Paths workspace, select the needed client and case.
5. On the **Manage Volumes** tab, click  corresponding to the volume to be changed.

6. Enter the correct path and click **OK**. The path must be entered as follows:
 - For image volumes, enter a UNC path.
 - For production files, enter a local, mapped drive, or UNC path.




NOTE: Make sure you enter the correct path; it is not validated during this process.

7. If needed, view images at the new location as described in "[Reviewing Document Details](#)" on page 11-3.

Delete a volume

If a volume is no longer used, it can be deleted as follows:

1. Getting started: Identify needed information, including needed path and volume name.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Client/Case Management** menu and click **Manage Volumes/Paths**.
4. In the Manage Volume Paths workspace, select the needed client and case.
5. On the **Manage Volumes** tab, click  corresponding to the volume to be deleted.



IMPORTANT! Make sure the correct volume is selected and is not in use; no check is performed on this action.

6. Click **Yes** in response to the confirmation message.

Updating File Paths

The following procedure allows you to update path information as follows:

- Modify image, native file, or production image path information for a range of pages (or the entire case).
 - Change the path used with a volume (the subfolder in the volume location).
 - Eliminate use of a volume and use a full path (not generally recommended).
1. Getting started:
 - a. Identify needed information, including image keys of documents to be changed and details of the path to be changed.
 - b. In Eclipse SE Administration, click the **Case Management** tab.
 - c. In the navigation panel, expand the **Client/Case Management** menu and click **Manage Volumes/Paths**.
 2. In the Manage Volume Paths workspace, select the needed client and case.
 3. Click the **Bulk Update File Paths** tab.
 4. Enter the **Starting** and **Ending Image Key**, or select **Entire Case**.
 5. Select the type(s) of paths to be changed:
 - Image Path
 - Native File Path
 - Production Image Path
 6. For changes that do not include the use of volumes:
 - a. Enter the path to be changed in the **Search For** field.
 - b. Enter the new path in the **Replace With** field.
 - c. Skip to step [step 8](#).

7. For volume-related changes:

a.

- b. Complete the **Search For** field with the image path details to be replaced, using the following syntax:

@vol1@path1

where:

vol1 is the volume name to be replaced, entered between two "at" signs. If no volume name exists, enter a single space between the at signs, as in: @ @

path1 is the path to be replaced, as it appears in the **Path** field. If no path exists, enter nothing.

- c. Complete the **Replace With** field with the correct image path details, using the following syntax:

@vol2@path2

where:

vol2 is the volume to be used, entered between two "at" signs.²⁰ Note: 1) If you need to change only the path (subfolder) details, enter the volume that is currently used for the images. 2) If you do not want use a volume, enter a single space between the at signs, as in: @ @

path2 is the path to be used (either a subfolder in the volume location or a full UNC path if no volume is used). If the volume defines the complete image path location, enter nothing for the path.

See "[Search/replace examples](#)" on page 7-33 for sample entries for replacing volume path details.

8. Click **Start**. For a large number of documents, a progress message will display at the bottom of the database records workspace.
9. Check documents in Eclipse SE Desktop (in the **Image**, **Quick View**, and/or **Production History** tabs) and/or in the Administration's Case Management's **Database Records** tab (see [Chapter 11](#)).

20. The volume does not need to exist at this point, but (obviously) must be created in order for images to be available in the case.

Search/replace examples

The following table shows examples of defined image paths and the search/replace entries needed to make changes using the procedure described in "Managing Volumes" on page 7-28.

Currently Defined Image Path	Search/Replace Entries
<p>Volume: <input type="text"/></p> <p>Path: D:\IMAGES</p>	<p>Replace a path that was part of the case import with a volume (VOL1) and subfolder (IMAGES):</p> <p>Search For: @ @D:\IMAGES</p> <p>Replace With: @VOL1@IMAGES</p>
<p>Volume: VOL1</p> <p>Path: IMAGES</p>	<ol style="list-style-type: none"> 1. Change the existing volume (VOL1) to a different volume (VOL2), leaving the subfolder (IMAGES) unchanged: <p>Search For: @VOL1@</p> <p>Replace With: @VOL2@</p> 2. Change the existing volume and subfolder: <p>Search For: @VOL1@IMAGES</p> <p>Replace With: @VOL2@SMITH\IMAGES</p> 3. Change subfolder alone: <p>Search For: @VOL1@IMAGES</p> <p>Replace With: @VOL1@SMITH\IMAGES</p> 4. Remove a volume and use a complete UNC path: <p>Search For: @VOL1@IMAGES</p> <p>Replace With: @ @\\server\cases\images</p>

8 Importing and Exporting Case Data and Files

In this Chapter

Overview	8-1
Importing Case Data	8-6
Importing OCR Files	8-36
Importing Production History	8-38
Importing Ipro Classic Suite Projects	8-40
Exporting Case Data	8-42
Exporting a Case Definition File	8-49
Publishing a Case	8-49

Overview

Ipro Eclipse SE allows you to import and export data from/to a variety of load files and sources. You can import:

- Case data files:
 - Load files
 - OCR (plain text files containing image OCR)
 - Production files (images or PDFs produced by Ipro Eclipse SE or other product)
- Issue tag details
- Case data and/or files from Ipro Classic Suite 8.7 or later.

Data can be exported to a variety of load file formats; you can also publish a standalone version of all or part of a case for reviewers outside of your Eclipse SE environment.



File Details

Case data files

Eclipse SE Administration makes it easy to import or export case data—both document (field) data and page (image) data—from/to a variety of file types, as listed in the following table.

For files that contain both document and page data, both types of data is imported at the same time (or they can be imported separately). Performing overlays is also possible to allow for easy updating of records.

Import/Export File Types

File Type	Description	Use to Import or Export this Data...	
		Doc.	Page
.CSV	A delimited ASCII text file with a delimiter format of quote-comma-quote or plain commas.	X	
.DAT ^a	A delimited ASCII text file containing field data and metadata, exported from Concordance or other product that can create such a file.	X	
.DLF	A type of Ipro Tech load file. The .DLF file contains all document- and page-level information for case data. See Appendix A for details.	X	X
.LFP ^b	An Ipro Tech load file provided by scanning software or conversion programs. Note: the .LFP commands supported by Eclipse SE are discussed in Appendix B .		X
.LST	A Summation file for importing or exporting extracted text (document-level OCR) to text files.	X	
.OPT	Opticon load file for image data.		X
.TXT ^b	An ASCII text file treated the same as a .CSV file. (Import only; can export to .CSV file.)	X	

Import/Export File Types (Continued)

File Type	Description	Use to Import or Export this Data...	
		Doc.	Page
.XML	An XML file using EDRM (Electronic Discovery Reference Model) schema to define document or page data. See Appendix C for details.	X	X
.OLL ^c	An inData load file used to establish relationships for multipage documents.	X	X

- a It is possible to migrate Concordance or Summation cases directly from those applications to Eclipse SE (with the proper environment); see the applicable sections in [Chapter 5](#).
- b An .LFP file containing IS lines only can be used to import tags alone into a case, or a .TXT file containing image keys and tag information can be used to import tags alone (document and/or page tags).
- c When exporting to a .OLL file, keep in mind that there is a 20 character image key limitation for all files in this export. Trial Director .OLL files also do not support single page PDF files for multipage documents.

Case definition files

In addition to case data, you can export and import case definition details, which can serve as a “template” for cases. The case definition file is an .XML file with a file extension of .CSE. It includes the case details, but not data.

This chapter discusses the import and export of case data and files. For details on using case definition files:

- A .CSE file is used (imported) to create a new case as explained in "[Creating a New Case](#)" on page 5-4.
- A .CSE file can be created explained in "[Exporting a Case Definition File](#)" on page 6-6. (Note that a .CSE file is also created automatically whenever you export case data into any type of load file.)

Ipro Product Integration

Ipro eScan-IT

In addition to importing case data from within Eclipse SE, Ipro's eScan-IT™ (version 2.94.0.1 or later) can autoload data and images directly into an existing Eclipse SE case. See the *Ipro eScan-IT User Guide* for details.

Ipro Eclipse

If you have Ipro Publish, you can publish Ipro Eclipse® cases using the .DLF and associated load files as explained in "[Publishing a Case](#)" on page 8-50.

Ipro Classic Suite Integration

The following aspects of an Ipro Classic Suite (version 8.7 or later) project can be imported into Eclipse SE:

- Fielded data
- Image files
- Native files
- Page OCR
- Tags
- Redactions
- Annotations (highlights, markups, sticky notes, embedded text)

If you have both Ipro Classic Suite and Ipro Publish, you can also publish Classic Suite cases as explained in "[Publishing a Case](#)" on page 8-50.

Configuration Task Order

Importing case data and/or files

Case data and/or files can be imported after a new case has been created, or when data needs to be added to an existing case. If the case has not been created, see [Chapter 5, Creating Cases](#).

Exporting case data

Case data can be exported from an Eclipse SE case at any time (after data has been imported into it).

Privileges Required

By default, you must have Super or Case Administrator rights to import or export case data. These requirements may differ if the Super Administrator modifies privileges for a particular user.

Load File Considerations

Load file size

For greatest efficiency, the size of individual load files should not exceed 5 GB.

Record size limitations

If any single record is over 2 GB, the corresponding record and all page information will not be imported, and an error will be logged.

Image key considerations

In Eclipse SE, the image key field (BEGDOC) is a string data type and thus is based on a string rather than a numeric value. The string data type accounts for alphabetic characters. (For example, the numbers will in the following order: ECL000001, ECL0000013, ECL0000023, ECL0000025).

Thus, when importing data, if a load file contains inconsistent image keys (for example, "ECL" and "ELC" as prefixes), the data will be associated with the inconsistent image key and may be omitted from a production range based on an image key range.



TIP: Check load files before importing to ensure the image keys are consistent.

Path information

Eclipse SE attempts to determine the correct paths for image, native, and OCR files automatically. If a path cannot be determined, you must correct the path manually as explained in the procedures in this chapter. Entries can be validated when you make changes. In addition, path information is checked during load file validation and related errors are noted.

Importing Case Data

Before You Begin

Before you import case data into Eclipse SE Administration, ensure that you read the ["Overview"](#) on page 8-1. Then, for greatest efficiency, “walk through” the four distinct steps in Eclipse SE Administration. This will allow you to familiarize yourself with the information you will need and the options you will have.

To “walk through” the steps:

1. In Eclipse SE, click the **Case Management** tab.
2. In the navigation panel, expand the **Import/Export** menu and click the **Import Data** work task.
3. Beginning with the first tab (**Step 1**) of the Import Data workspace, review and make a note of the information you will need for each step. Refer to this guide for clarification on options and information required.
4. You need to understand the data you are importing so that imported fields can be correctly matched to the fields defined for the case. If needed, review the data you will be importing so you will know which fields and data types are being imported.

If for some reason, your case fields do not quite match the imported data, make changes to the case *before* you import the data. See ["Managing Database Fields"](#) on page 6-9 if needed.



IMPORTANT! Selecting options incorrectly during the import procedure (if the data does not match an option) will result in errors. Make sure you know the content of your import file and select these options only if they apply.

5. Consider the path information in your load file for image and/or native files. In Eclipse SE Administration, you can edit the path as part of the import. You can also use a “volume” to make it easy to define the location of such files during import and to manage image file locations after import. A volume is a variable used to represent all or part of the path for image and/or native files for a specific case.
6. To limit the import to specific records that have specific content in a particular field, make sure you have defined that field as a **Category** field and included a control list as explained in ["Category"](#) in Chapter 5.

7. If you are importing data into an existing case (as opposed to a new case), consider when you will do so. Depending on the size of the database, system capabilities, and other factors, importing data may interrupt reviewer actions and consume significant system resources and time.

If you are importing large amounts of data, it is recommended that you do so during “off hours” to minimize the impact to the system and your users, for example, at the end of the work day or on the weekend. Notify users who may work at these times of possible interruptions.


8. Continue with the procedures explained in this section.



CAUTION: You cannot save a portion of a data import (such as your entries for steps 1 and 2). If you exit Eclipse SE Administration before completing all steps, you will lose your work.

Selecting the Data Source

After completing preparation (see page 8-6), complete the following steps:

1. If your import file is open in another application, for example, a .CSV file is open in Microsoft Excel, close the file and the application.
2. In the Eclipse SE Administration’s Import Data workspace, click the **Step 1. Select Source** tab.
3. Select the client and case into which data is to be imported.
4. **Job Name:** If desired, replace the default job name with a name of your own choosing. This job name is used in the Import-Job History for the case. The log file path cannot be changed.
5. **Import File:** Enter the full path to the needed import file. Alternatively, click the  button and navigate to and choose the needed file. Files may be any of the following types:
 - Document-level data: .CSV, .DAT, .DLF, .TXT, or .XML
 - Page-level data: .DLF, .LFP, .OLL, .OPT, or .XML
 - Document-level OCR (extracted text) files: .LST



NOTE: If you need to import multiple files at once (for example, a service bureau has provided multiple files for a case), select any one of the files to be imported now. Additional files will be selected in [step 12](#).

6. **Number of sample records:** Select a sample of 1, 15, or 100 records. The initial lines in the import file are evaluated in order to display the number of records (documents and/or pages) specified here. If the selected number of records is not defined within the lines that are evaluated, then the sample will be smaller than specified.
7. **First line is a header:** Select this option if the first row in the import file contains column titles instead of data. (Some file types, such as .OPT, will select this option automatically.)
8. **Sample Data:** Review the excerpt of data from the import file.

The columns in the table will differ, depending on which type of file is being imported. If you are importing an .LFP or OPT file, columns will be similar to this figure. For these file types, **Boundary** column will always show "Document," and the **Pages** column will show the number of pages in the document.

Sample Data:

ImageKey	BegAttach	Image Path	Native Path
ABC-00001	ABC-0000 ...	\\myserver\ ...	\\myserver\ ...
ABC-00002	ABC-0000 ...	\\myserver\ ...	\\myserver\ ...
ABC-00003	ABC-0000 ...	\\myserver\ ...	\\myserver\ ...
ABC-00004	ABC-0000 ...	\\myserver\ ...	\\myserver\ ...
ABC-00005	ABC-0000 ...	\\myserver\ ...	\\myserver\ ...

If default delimiters are not used in your load file, the sample data will not display correctly. In this case, continue to step 10.

9. **Delimiters:** If the data imported includes delimiters other than the standard types, change the delimiters to match the file. For details on default delimiters and instructions on using custom delimiters, see "[Delimiter details](#)" on page 8-11.

Ignore any delimiters that are not pertinent to your load file. (The entries in this area will be ignored if they do not apply to your load file.)

- **Field:** Select the character that separates each field.
- **Quote:** This optional delimiter typically marks the beginning and end of a field (as in .CSV files).
- **Newline:** Select the character that signifies the start of a new line in the load file.
- **Multi-Value:** Select the character that separates values within MULTI_VALUE fields.

- **Merged Fields:** Eclipse SE allows you to merge multiple fields (in "[Matching Database Fields](#)" on page 8-12). For example, you may be importing a case in which two fields were used for a large amount of text. If you want to merge fields, but also want an indicator of the original field separations, specify the delimiter here. The delimiter will be included in the merged data to identify the original field delineation(s).
- **Nested Value:** If the case you are importing includes groups of or nested tags²¹, select the delimiter that distinguishes groups, tags, and/or nested tags.

When delimiters have been defined, review the **Sample Data** to ensure it appears as intended.

10. **Date Format:** Select the date format that most closely matches the dates in your import file. For example, if your file includes dates in the format of **dd-mm-yyyy**, select the **D/M/Y** option. Also note the following:
 - Dates to be imported must be in a common date format. (For example, 27-09-2009 or 27 Sept 2009.)
 - If you are importing data from a .DLF file, the format must be **Y/M/D**.
 - Eclipse SE uses Microsoft's date interpreter/parser to interpret dates. Dates such as Friday June 15th, 1998 are possible, but if that date actually fell on a Saturday, then an error would be logged during import and the erroneous date would not be imported.
11. **Document Tag Option (LFP only):** .LFP files contain page-level tag details (not document-level tags). If importing from an .LFP file, select this option if you would like to change the page tags for the *first* page of each document to be document tags in Eclipse SE. If you do not select this option, all tags in the .LFP file will be defined as page tags in your Eclipse SE case. See the following table for details on making a selection.

.LFP Document Tag Option Details

If Eclipse SE case has...	Then...
Page-level tags only	Do not check the .LFP option. The resulting import will mirror the content of the .LFP file.

21. Nested tags are explained in "[Nested tags](#)" on page 5-25.

.LFP Document Tag Option Details (Continued)

If Eclipse SE case has...	Then...
Document-level tags only	Check the .LFP option if you want the page tags on the first pages of documents to be "converted" to document tags in the Eclipse SE case.
Both page- and document-level tags	<p>You may or may not want to check the .LFP option.</p> <ul style="list-style-type: none"> • If you do not check the option, the resulting import will mirror the .LFP exactly, with page tags only. • If you check the option, the resulting import will mirror the .LFP except for the first pages of documents. If those pages include tags, then those tags will be defined as document tags.

**NOTE:** Regarding imports from .LFP files:

- The import process imports/updates only those records specified in the .LFP. Therefore, related documents are updated only if they are specified in the .LFP file.
- If an .LFP file indicates that a tag to is be set for an existing record and that tag is exclusive (that is, only one tag in its group can be selected), the import will change the tag.
- Not all .LFP commands are supported—supported commands include: AN, FT, IM, IS, OF, OI, OT, VN. Unsupported commands are ignored.
- When images are imported via an .LFP file, ENDDOC and ENDATTACH values are identified by Eclipse SE and added to the fields automatically.

12. **Batch Import:** To select additional files to import, complete the following steps. If the file selected in [step 5](#) is the only file to be imported, skip to ["Matching Database Fields"](#) on page [8-12](#).

Files must be of the same type and have the same fields as defined in the file specified in the **Import File** field.

- a. Determine whether you are adding a single file, a directory of files, or multiple recursive directories.
- b. In the **Batch Import** area, click the **Add** button.

- c. Navigate to and select the needed file(s), then click **OK**. Use Shift+click or Ctrl+click to select a contiguous or noncontiguous set of files, respectively.
- d. If needed, repeat steps b and c to locate and select additional files.
- e. Review the files listed in the **File Name** list. If a file should *not* be imported, click the file in the list and then click **Remove**.
- f. When the set of files is correct, continue with "[Matching Database Fields](#)" on page [8-12](#).

Delimiter details

This information supplements [step 9](#) of "[Selecting the Data Source](#)" on page [8-7](#).

Default delimiters

Eclipse SE includes default delimiters based on file type, as listed in the following table. In this table:

- A box, □, represents a nonprinting character.
- "NA" indicates the delimiter is not applicable to the file type.

File Type	Field	Quote	Newline	Multi-Value	Merged Field	Nested Value
.CSV	, (0044)	" (0034)	(none)	; (0059)	(none)	(none)
.DAT	□ (0020)	þ (0254)	® (0174)			
.DLF	(none)	NA	(none)			
.LFP	, (0044)	" (0034)	(none)			
.LST	, (0044)	" (0034)	(none)			
.OPT	, (0044)	" (0034)	(none)			
.TXT	, (0044)	" (0034)	(none)			
.XML	(none)	(none)	(none)			

Create custom delimiters

Certain import files, such as .CSV, .DAT, or .TXT, may include custom delimiters. To select a custom delimiter in [step 9](#) of "Selecting the Data Source" on page [8-7](#):

1. In the needed delimiter field, select **Custom**. (You will need to scroll to the bottom of the delimiter list.)
2. In the Create Custom Delimiter dialog box, click the **Characters** or **ASCII Values** option, depending on how you will specify the delimiter character(s).
3. If you select **Characters**, enter the character(s) in the top field under the **Characters** option. Separate more than one character with a space. The ASCII value for each character appears in the bottom field.
4. If you select **ASCII Values**, enter the ASCII value(s) for the needed character(s) in the top field under the **ASCII Values** option. Separate more than one value with a space. The character corresponding to each value appears in the bottom field.
5. When finished, click **OK**.

Matching Database Fields

Overview

If you are importing document data, match (map) the data fields defined in the imported file to the fields defined for the case in Eclipse SE Administration. Note:

- Some fields in the import file can be omitted (not mapped) if needed. For example, the import file may have a Word Count field that is not needed in the Eclipse SE case.
- More than one field in the import file can be mapped to a single field in the case. For example, the import file may have two fields to define an author's name (First Name, Last Name). In the Eclipse SE case, a single field may be used for this information (Name).



NOTE: If you are importing image data (such as from an .LFP or .OPT file), matching of database fields may not be required. See "[Map image data and OCR text files](#)" on page [8-16](#).

-
- Several options relate to field mapping. For example, Eclipse SE allows you to correct the file path information in the import file so that the data will be correct in your Eclipse SE case.
 - The following procedures comprise this step of the import process:
 - ["Map fields using auto-selection"](#) on page 8-13
 - ["Map fields manually"](#) on page 8-14
 - ["Map image data and OCR text files"](#) on page 8-16
 - ["Selecting Mapping Options"](#) on page 8-17

Map fields using auto-selection

Eclipse SE Administration can attempt to match the fields based on the field position or name. For example, if the input data contains a column called IMGKEY and the case contains a field named IMGKEY, it will automatically line up the source and destination field.

To auto-select fields:

1. After completing ["Selecting the Data Source"](#) on page 8-7, click the **Step 2. Map Fields** tab in the Import Data workspace.
2. To match by field name, ensure that your imported data includes field names in the header and that **First line is header** is selected in the **Step 1** tab. In the Import Data workspace, click the **Step 2. Map Fields** tab.
3. Click the **Auto-Select By Field Position** or **By Field Name** button.

4. Evaluate the matching to determine if:
 - the auto-matching does not meet your needs, and/or
 - Some fields cannot be matched (in which case, the word Select in the **Database Field** column will be red).



NOTE: For auto-selected matching, make sure that one of the import fields is matched to the BEGDOC field defined for the case.

5. If any problems exist, continue with ["Map fields manually,"](#) next.
6. When all fields to be included are matched, continue with ["Selecting Mapping Options"](#) on page 8-17.

Map fields manually

To manually match the fields:

1. In the Import Data workspace, click the **Step 2. Map Fields** tab.
2. Evaluate the **Import Field** listing to determine which fields will be included in the import.
3. For each field to be imported, click in the **Database Field** column and choose the database field you want to match to the import field. The list shows the field name and type to assist you with matching.
4. Repeat [step 3](#) for all fields to be included.
5. When all fields to be included are matched, continue with ["Selecting Mapping Options"](#) on page 8-17.



NOTES:

- Make sure that one of the import fields is matched to the BEGDOC field defined for the case.
- Selecting a matching database field automatically selects the **Include** option for you.
- You will be alerted if you concatenate fields (match two or more fields to a single Eclipse SE field; see the following example). Ensure a delimiter is defined in "[Selecting the Data Source](#)" on page 8-7, step 9.
- Tips for manually selecting fields—To easily select needed fields, click in the needed **Database Field** and take any of the following actions:
 - Use the mouse scroll wheel to move through the field list.
 - Type the first letter of the needed field name to jump to the first field name starting with that letter.
 - Press **Tab** to move from field to field.

Include	Import Field	Sample Data	Database Field
<input checked="" type="checkbox"/>	First Name	John	Name
<input checked="" type="checkbox"/>	Last Name	Smith	Name
<input type="checkbox"/>

Concatenated Fields Example

Map fields using a field template

If you will be importing multiple load files separately (not as a batch), you can set up needed field mapping, save a template, then use the template to easily map fields for additional imports.

Create field template

1. On the **Step 2** tab of the Import Data workspace, map fields using one of the previously described procedures.
2. Click **Save Field Template**.
3. In the Save Template File dialog box, navigate to an appropriate location for the template, enter a template file name, and click **Save**. An .XML-based field template is created. Field mapping and path correction data is maintained in the template.

Use field template

After creating a field template as described in the previous procedure, use it as follows:

1. On the **Step 2** tab of the Import Data workspace, click **Load Field Template**.
2. In the Load Template File dialog box, navigate to the needed template, select it, and click **Open**. Mapping selections and path corrections will be made according to the template.
3. Review mapping details and make changes if needed.
4. When finished, continue with ["Selecting Mapping Options"](#) on page 8-17.

Map image data and OCR text files

If you are importing image data (such as from an .LFP or .OPT file) or an .LST file for OCR text, matching of database fields can often be skipped, as discussed in the following paragraphs.

.LFP files

If you are importing an .LFP file, note that Eclipse SE Administration will automatically match the necessary fields. If applicable, two additional fields can be mapped:

- **IM lines:** If boundaries specified in IM (Load Image Master Record) lines include a "C" as shown in the following example, then a relationship will be created if you map a BEGATTACH field (and that field references the BEGDOC of the parent document):

```
IM,000010,C,0,@001;IMG_0001;000010.tif;2,0
```

- **OF lines:** Original File (OF) for EDD Image lines correspond to NATIVE fields in Eclipse SE. If your .LFP file includes OF lines, you must map a NATIVE field if you want to import that information.

.LST and .OPT files

If you are importing an .LST or .OPT file, Eclipse SE Administration will automatically match the necessary fields, so users should skip to ["Selecting Mapping Options,"](#) next.


Selecting Mapping Options


After completing field mapping discussed in the previous procedures, complete the following procedures as they apply to your data.

Check/correct path information



You can easily check any file path information (for the image path, text, and/or native files) contained in the load file and change it to "point to" the correct location for the files being added to the Eclipse SE case.

To change path information for files used in your Eclipse SE case:

1. On the **Step 2** tab of the Import Data workspace, locate an import field that includes a file path/file name (the **Image Path** or a mapped EXTRACTEDTEXT or NATIVE field), click  next to the corresponding **Database Field** field. Eclipse SE will check the path and file name.
 - If the specified file exists at the specified location, a success message will display. Click **OK** and skip to step 3.
 - If the specified file does not exist at the specified location, an error message will display. Complete step 2.
2. To correct file paths, click **OK** in the error message and complete the Edit Path dialog box as follows:
 - a. **Load File Path:** Review the path information to determine the part of the path that is incorrect and needs to be replaced.
 - b. **Replace Text:** Enter the incorrect portion of the load file that you identified in step a.

TIP: You can select/copy the incorrect portion of the path in the **Load File Path** field and then paste it in this field.
 - c. **With:** Enter the correct file path information, either the path itself or a volume name that represents the correct path details. Note:
 - ♦ For path entries, either type the path or click  to navigate to and select the needed file location.
 - ♦ If entering a volume name, precede and follow the volume name with the "at" sign, @, as in @VOL1@. For details on entering volume information, see "[Search/replace examples](#)" on page 7-33.

3. **Imported Path:** Review the corrected path for accuracy:

- a. If needed, click  to update the path in the **Imported Path** field.
For volumes, the complete path represented by the volume (and the portion of the load file path that you are not replacing) displays beneath the **Imported Path** field.
- b. To verify that the path is correct, click . If the file is not found, check your work and make corrections as needed.
- c. When the validation message states **File found!**, click **OK**.



TIP: If the path you enter is not valid, check your entries carefully. For example, look for missing or extra backslashes such as `\\server001\cases\smith\native\ec10001.doc`. (Note the incorrect double backslash between "smith" and "native.")

4. Repeat these steps for each type of path in the load file.
5. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to "[Load File Validation](#)" on page 8-28.

Select import mode for data


Complete the following steps to define how data will be added to a case.

1. On the **Step 2** tab of the Import Data workspace, in the **Select Mode** section, select the way in which data is imported into the Eclipse SE case, as explained in the following table.

Import Mode Options

Option	Description		
Append All Records	<p>Use this option to add new records to a new or existing database.</p> <ul style="list-style-type: none"> • For a new case, all records in the load file will be added to the database. • For an existing case: <ul style="list-style-type: none"> - Records in the load file that do not currently exist in the case will be added to the database. - Records in the load file containing fields that match those already populated in the database will <i>not</i> update those populated fields. <p>The load file must contain a BEGDOC, DOCID, or IMAGEKEY field.</p>		
Overlay/Append	<p>Use this option to update existing records and add new records to an existing database. Selected records can be updated as described in step 2.</p> <ul style="list-style-type: none"> • Records in the load file that do not currently exist in the case will be added to the database. • Records in the load file that are also in the existing case will overwrite only the fielded information in the database with the fielded information contained in the load file. The following example shows the effect of an import when this option is selected. 		
	Load File "Pet" Field	Eclipse SE Case "Pet Field"	
		Before Import	After Import
	dog	(blank)	dog
		cat	dog
	dog	dog	
(blank)	dog	(blank)	

Import Mode Options (Continued)

Option	Description
Overlay Only	<p>Use this option to update existing records. Selected records can be updated as described in step 2.</p> <ul style="list-style-type: none"> Records in the load file that do not currently exist in the case will not be added to the database. Records in the load file that are also in the existing case will overwrite only the fielded information in the database with the fielded information contained in the load file (see the previous example).
Tag Import	<p>Use this option to import tags from a plain text file and apply them to records in the Eclipse SE case. Tags can be imported from a plain text file as described in "Text file tag-import details" on page 8-21.</p> <p> NOTE: Do <i>not</i> select this option if you are importing from an .LFP file with IS lines only. (In that case, choose from the previous options, depending on whether you want to add new tags only, update existing tags, or both.)</p>

2. **Overlay Field to Match:** If you select either of the Overlay options in step 1, select the field to be used for matching the load file records to the case records. This is typically the BEGDOC or DOCKEY field, but may be another field. If importing tags, this must be the BEGDOC field.
3. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to ["Load File Validation"](#) on page 8-28.

Text file tag-import details

This information supplements "[Select import mode for data](#)" on page 8-18. Tag details can be imported using a plain text file (such as a .CSV or .TXT file) containing image keys and tag information for each record for which tags are to be applied. The following figure shows the content of a typical text tag-import file. In this example, tag groups, tags, and nested tags are being imported.



Tags defined in the import file will be created in the Eclipse SE case if they are not already defined for the case.

To import tags successfully, ensure that the issues in the following table are addressed.

Tag Import Considerations

Issue	Description
File format	<ul style="list-style-type: none"> • Make sure the First line is header option is <i>not</i> selected when you complete "Selecting the Data Source" on page 8-7. • Make sure the import file does <i>not</i> contain a header line. • Ensure each line of the file contains no more than one tag definition (either a tag, a tag group»tag, or tag»nested tag). • If tag groups are to be imported, every line of the file must include a tag group»tag entry. For example: Wrong: ECL00001 CONFIDENTIAL»CONF1 ECL00001 CONF2 Right: ECL00001 CONFIDENTIAL»CONF1 ECL00001 CONFIDENTIAL»CONF2

Tag Import Considerations (Continued)

Issue	Description
Delimiters ^a	When you complete "Selecting the Data Source" on page 8-7: <ul style="list-style-type: none"> • Make sure the correct Field delimiter is defined. • If the import file includes tag groups and/or nested tags, make sure the correct Nested Field delimiter is defined.
Overlay field	When you complete "Select import mode for data" on page 8-18, make sure the Overlay Field to Match is set to the BEGDOC field.
Import options	Before performing the import, address the following: <ul style="list-style-type: none"> • Page tags: Determine whether tags should be applied to documents or individual pages. • Private tags: Determine whether private tags should be imported. • Tag groups: Determine whether the import file includes tag groups or nested tags. See the previous figure for details. These options are selected during "Completing the Import" on page 8-31. If tag groups are not defined, tags will be placed in an "Imported Tags" group.

a The delimiters used in the examples in this topic are common but not required. Delimiters in your file may be different.

Select image file options

Complete the following steps to select image handling options and correct the image path if needed. If you are importing tags, skip this procedure.

1. Ensure that the **Step 2** tab is selected on the Import Data workspace.
2. **Image Options:** If you are importing data into a new case that contains no data, leave the default selection and go to step 3.



CAUTION: If you are importing an .LFP file that does not include IM lines, these options do not apply. (That is, the file contains OT, OI, FT, IS, and/or AN lines only.) In this case, leave the default selection and go to step 3.

(In order for these options to apply, the .LFP file must have IM lines that correspond to AN lines for the same image keys.)

For other types of load files, select one of the following options:

- **Create error if image exists:** If the image key specified in the import file exists in the case, an error is logged and the image record is not created.
- **Overwrite and remove existing annotations:** If the image key specified in the import file exists in the case, overwrite the record and eliminate any annotations (highlighting, mark-ups, and/or redactions) that were specified for the image.





NOTE: If you select the **Overwrite and remove existing annotations**, ensure that the **Rebuild Indexes after last Load File** option is selected in "[Select indexing method](#)" on page [8-27](#) regardless of load file size or type.


This selection causes re-indexing to occur after the import is completed, which provides a faster, more efficient approach when you are overwriting and removing existing annotations.

- **Overwrite but retain existing annotations:** If the image key specified in the import file exists in the case, overwrite the record and keep any existing annotations (such as highlighting, mark-ups, and/or redactions) that were specified for the image.
- **Skip existing images:** If the image key specified in the import file exists in the case, leave the record for that image unchanged.

3. **Image file path:** If the path defined in the load file for image files in the load file is incorrect, click **Edit File Path** in the **Image Options** area and complete the Edit Image Path dialog box:
 - a. **Load File Path:** Review the path information to determine the part of the path that is incorrect and needs to be replaced.
 - b. **Replace Text:** Enter the incorrect portion of the load file that you identified in step a.

TIP: You can select/copy the incorrect portion of the path in the **Load File Path** field and then paste it in this field.
 - c. **With:** Enter the correct file path information, either the path itself or a volume name that represents the correct path details. Note:
 - ♦ For path entries, either type the path or click  to navigate to and select the needed file location.
 - ♦ If entering a volume name, precede and follow the volume name with the "at" sign, @, as in @VOL1@. For details on entering volume information, see "[Search/replace examples](#)" on page 7-33.
 - d. **Imported Path:** Review the corrected path for accuracy.

If needed, click  to update the path in the **Imported Path** field.


For volumes, the complete path represented by the volume (and the portion of the load file path that you are not replacing) displays beneath the **Imported Path** field.
 - e. To verify that the path is correct, click . If the file is not found, check your work and make corrections as needed.
 - f. When the validation message states **File found!**, click **OK**.
4. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to "[Load File Validation](#)" on page 8-28.


Select text options

If OCR text files are being imported as part of the load file, complete the following steps.


1. Ensure that the **Step 2** tab is selected on the Import Data workspace.
2. In the **Text Options** area, select the **Prompt on missing Text Files** option if you want to receive a prompt for each case record for which an OCR text file does not exist.
3. **.CSV or .DAT Load Files Only:** If the EXTRACTEDTEXT field contains paths to OCR text files instead of the actual text, select the **Extrct. Text contains File Path** option. Text from the files will populate the EXTRACTEDTEXT field and **Extracted Text** tab for each document.
4. If the path defined in the load file for text files is incorrect and you did not make corrections during field mapping, click **Edit File Path** in the **Text Options** area and complete the Edit Text Path dialog box:
 - a. **Load File Path:** Review the path information to determine the part of the path that is incorrect and needs to be replaced.
 - b. **Replace Text:** Enter the incorrect portion of the load file that you identified in step a.

TIP: You can select/copy the incorrect portion of the path in the **Load File Path** field and then paste it in this field.

- c. **With:** Enter the correct file path information or click  to navigate to and select the needed file location.
- d. **Imported Path:** Review the corrected path for accuracy.

If needed, click  to update the path in the **Imported Path** field.

For volumes, the complete path represented by the volume (and the portion of the load file path that you are not replacing) displays beneath the **Imported Path** field.


- e. To verify that the path is correct, click . If the file is not found, check your work and make corrections as needed.
 - f. When the validation message states **File found!**, click **OK**.
5. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to "[Load File Validation](#)" on page 8-28.


Correct native file paths

If the path defined in the load file for native files is incorrect and you did not make corrections during field mapping, complete the following steps.

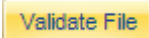
1. Ensure that the **Step 2** tab is selected on the Import Data workspace.
2. In the **Native Options** area, click the needed button and complete the Edit Native Path dialog box as follows:
 - a. **Load File Path:** Review the path information to determine the part of the path that is incorrect and needs to be replaced.
 - b. **Replace Text:** Enter the incorrect portion of the load file that you identified in step a.

TIP: You can select/copy the incorrect portion of the path in the **Load File Path** field and then paste it in this field.

- c. **With:** Enter the correct file path information or click  to navigate to and select the needed file location.
 - d. **Imported Path:** Review the corrected path for accuracy.

If needed, click  to update the path in the **Imported Path** field.

For volumes, the complete path represented by the volume (and the portion of the load file path that you are not replacing) displays beneath the **Imported Path** field.

- e. To verify that the path is correct, click . If the file is not found, check your work and make corrections as needed.
 - f. When the validation message states **File found!**, click **OK**.
 3. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to "[Load File Validation](#)" on page 8-28.

Select indexing method

Eclipse SE uses a comprehensive index of terms and data for each case added to the Eclipse SE database, which allows search speed and performance to be optimized.

Complete the following steps to select the indexing method that will help ensure that your import into an Ipro Database is processed safely and has the least impact possible on your existing case.

1. Ensure that the **Step 2** tab is selected on the Import Data workspace.
2. In the **Indexing option** area, click **Edit Indexing Option**.
3. Read the indexing option descriptions and select the option that most closely matches the current import circumstances.



NOTE: If you selected the **Overwrite and remove existing annotations** in "[Select import mode for data](#)" on page 8-18, select the **Rebuild Indexes after last Load File** option here regardless of load file size or type.

This option is also the default and recommended setting if you are performing a batch import.

Rebuilding indexes after the last load file causes re-indexing to occur after the import is completed, which provides a faster, more efficient approach when you are overwriting and removing existing annotations or importing from multiple files.

4. Click **OK**.
5. As needed, continue with another procedure described in this section. If no additional options on the **Step 2** tab need to be set, go to "[Load File Validation](#)" on page 8-28.

Load File Validation

This procedure applies if you are importing from a load file. Skip this procedure if you are importing only tags.


To validate your import file:

1. On the **Step 2** tab of the Import Data workspace, in the **Action** area, select **Validate**.
2. Click **Submit**.
3. When the process is completed, click **View Results** and complete step 4 (recommended) or step 5.
4. To correct errors, evaluate each tab of the Validation Results dialog box and refer to the following topics for details:
 - ["Manage undefined tags,"](#) next
 - ["Manage undefined redactions"](#) on page 8-29
 - ["Review undefined control list values"](#) on page 8-30
 - ["Evaluate load file errors"](#) on page 8-31
5. To ignore errors and continue with the import, perform one of the following steps. In this case, errors will need to be corrected after the import.
 - If validation is *not* required for the case (see note above), click **Cancel** in the Validation Results dialog box and continue with ["Completing the Import"](#) on page 8-31.
 - If validation *is* required for the case, continue with ["Completing the Import"](#) on page 8-31. When errors are found, you will be alerted and have the option to ignore the errors.

Manage undefined tags

Undefined tags are those that do not match tags in your case. Tags that do match your case will be imported. After completing ["Load File Validation"](#) on page 8-28, follow these steps to manage undefined tags:

1. Review the tags listed on the **Tags** tab of the Pre-Process Results dialog box, and the groups in the **Tag Groups** pull-down list.
2. Take the following steps as needed:
 - If suitable groups exist for all of the tags, skip to step 4.
 - If a new group is needed for some (or all) of the tags, go to step 3.
 - If you do not want to import one or more tags, leave the group as *(not set)* and skip to step 6.

3. To create one or more new tag groups for undefined tags:
 - a. Click  on the right side of the tab.
 - b. In the Create Tag Group dialog box, enter a new tag group name and select needed group rules. For details, see "[Group rules](#)" on page 5-23.
 - c. Click **OK**.
 - d. Repeat steps a - c for other new tag groups.
 - e. Continue with the next step.
4. For each undefined tag to be imported, click the tag, then select the needed group from the **Tag Group** list.

Tips:

 - Right-click a tag to select the needed group.
 - To apply the same selection to multiple tags, click the first tag, then Shift+click the last tag to select a contiguous set of tags or Ctrl+click other tags to select a non-contiguous set.
5. Repeat step 4 for all tags to be imported.
6. Continue with other pre-processing tasks as needed. If none exist, go to "[Completing the Import](#)" on page 8-31.

Manage undefined redactions

Undefined redactions are those that do not match redactions in your case. Redactions that do match your case will be imported.

After completing "[Load File Validation](#)" on page 8-28, follow these steps to manage undefined redactions:

1. Review the redactions listed on the **Redaction Categories** tab of the Pre-Process Results dialog box. An ID of zero indicates that the redaction label is not found in the case.
2. Select the redactions you want to import and add to your case. For multiple redactions, click the first redaction, then Shift+click the last redaction to select a contiguous set of tags or Ctrl+click other tags to select a non-contiguous set.
3. When all needed redactions are selected, click **Create Redaction Categories**. An ID number will be assigned to all selected redactions.
4. Continue with other pre-processing tasks as needed. If none exist, go to "[Completing the Import](#)" on page 8-31.

Review undefined control list values

Control list values are the values defined for database fields for which the **Category** flag has been used. (See discussion of categories in "[Create new fields](#)" on page 5-21.)

For your convenience, undefined control list values (those that do not match the values defined in your case) are automatically added to your case as part of the import process.²²

After completing [Pre-Processing](#) on page 8-28, follow these steps to review undefined control list values:

1. In the Pre-Process Results dialog box, click the **Control Values** tab.
2. Review the details as follows:
 - **Control Field**: Lists the field(s) that have been defined with the **Category** flag and have control list values.
 - **Existing Control Values**: Lists the control values defined in the case for the selected field.
 - **Control Values from Load File**: Lists control values found in the import file that are *not* defined in the case.
3. For each field listed in the **Control Field** list:
 - a. Click a field name.
 - b. Review the control list values that exist in the case and those in the load (import) file.
 - c. Repeat steps a and b for all fields listed.
4. Continue with other pre-processing tasks as needed. If none exist, go to "[Completing the Import](#)" on page 8-31.

22. Prior to release 2014.0.1, values that were not defined in the case had to be manually added as part of pre-processing activities.

Evaluate load file errors

The Validation function evaluates the load file for errors. After completing "[Load File Validation](#)" on page 8-28, follow these steps to check load file errors before you import case data:

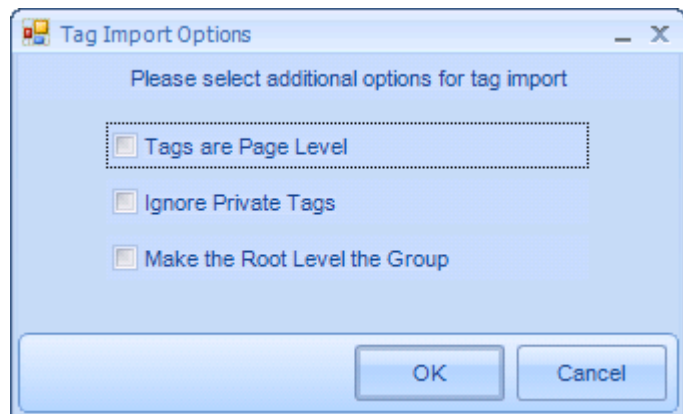
1. In the Validation Results dialog box, click the **Load File Errors** tab.
2. Review the error summary in the top portion of the workspace.
3. To see the load file content for a particular error:
 - a. Select the error.
 - b. Select the **Preview Load File** option.
 - c. Review the actual load file content in the bottom portion of the workspace.
4. Your action will depend on the number and type of errors.
 - For severe problems, correct the load file or obtain a new one.
 - For few or minor problems, continue with other validation tasks as needed. If none exist, go to "[Completing the Import](#)" on page 8-31.

Completing the Import

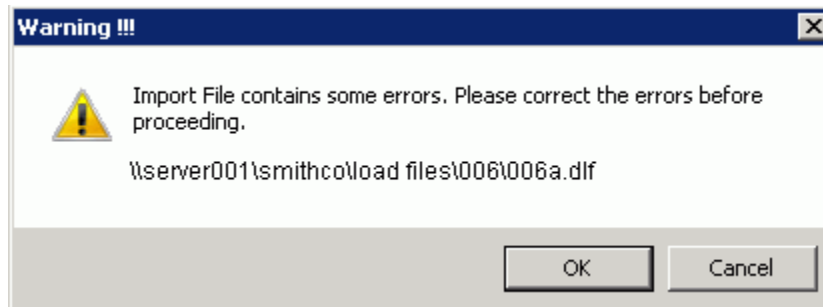
Once all aspects of the import are defined, import the data as follows. Import settings can also be saved if desired.


1. On the **Step 2** tab of the Import Data workspace, in the **Action** area, select **Import**.
2. Click **Submit**.
3. If you are importing tags, the adjacent message will display.

Select the needed options. If you are importing tag group names, ensure that **Make the Root Level the Group** is selected; otherwise, tags will be imported to the group "Imported Tags."



4. If the **Require Validation of Load Files** option is selected for the case²³ and load file errors are found, an error message will display as shown in the following example.



- a. Click **OK**; the Validation Results dialog box opens.
 - b. Review load file errors and complete step c or d.
 - c. To correct errors, click **Cancel**, make corrections (see ["Evaluate load file errors"](#) on page 8-31), then repeat this procedure.
 - d. To ignore errors and complete the import, select the **Accept Errors and Allow Import to Continue** option.
5. Progress will display on the **Step 3. View Progress** tab. Read the information as it is presented. If error(s) occur, click **Cancel** to stop the import if needed.
6. If needed, when the import is complete, take one or both of the following actions:
- If the status for a load file is shown as "Completed with errors," click  next to the error message. A text file containing error details will open.
 - Click the **View** button at the bottom of the tab to see overall details about the import. The import log (text) file opens; this file lists the fields that were mapped, options, selected, and start/stop information for each load file.
7. Next, click the **Step 4. Verify** tab.
8. Evaluate records as explained in [Chapter 11](#). Possible activities include:
- Reviewing the **Documents** list
 - Reviewing document details (for tag imports, reviewing tag information)
 - Deleting a document or page

23. Covered in ["Step 6: Select Case Options"](#) on page 5-32.

-
- Checking/changing image file path
 - Managing the volume used to define the image path
 - Viewing images
9. When finished, continue with other administrative activities.
 10. **Summation only:** If you have imported Summation case data and you have .ANN files containing annotation data for the case, complete ["Importing Summation annotations"](#) on page 8-33 to import Summation annotations.



TIP: Reports to help you evaluate the imported records are available in Case Management. See ["Working with Reports"](#) on page 15-1 for details.

Importing Summation annotations

About annotations

Summation exports may include .ANN files containing annotation data for the case documents you have imported. Annotations include redactions, highlighting, text, or markups such as lines, circles, etc.

A simple Eclipse SE utility allows you to import most annotation data into your Eclipse SE case. Redactions and highlights are supported as well as free-form lines. If Eclipse SE does not include a type of Summation annotation (for example, a circle), it will re-create the annotation using Eclipse SE tools (such as using the line tool to draw a circle) whenever possible. Some types of annotations may not be imported.

Import procedure

To import annotation data using .ANN files (or a text file containing annotation for multiple document pages):

1. Preparation:
 - a. Identify the location of the .ANN files to be imported and ensure that Eclipse SE Administration can access the identified location. Files can be located in multiple folders at that location.
(If you will be using an import file, ensure that Eclipse SE has access to the file's location.)
 - b. Identify the Eclipse SE case for which the .ANN files will be imported.
 - c. Ensure that the .ANN file files are named with the BEGDOC numbers corresponding to the documents in the Eclipse SE case.

- d. Either ensure the redactions specified in the .ANN files have been defined in the Eclipse SE case, or if some (or all) redaction names do not match, identify a default redaction category to be used for all Summation redactions that do not exist in the Eclipse SE case.
- e. If you have an early version of Summation with page- instead of document-based .ANN files, create a text import file that identifies pages for each document. The format of each line in the file is:

BEGDOC, Page#, Filepath

where

BEGDOC = the document BEGDOC value

Page# = the physical page number to which the annotations should be applied

Filepath = the path to the page's .ANN file

2. In Windows Explorer, navigate to the Eclipse SE Admin program folder, by default Program Files\Ipro Tech\Eclipse SE\Admin.
3. In the Admin folder, double-click EclipseLoadSumAnn.exe. The Load Summation Annotations utility starts:



4. Log in to Eclipse SE by selecting **Menu > Login**.
5. Select **Menu > Select Case** to choose the case for which the .ANN files are being imported. Continue with step 6 or 7.



TIP: You can skip steps 4 and 5 and complete them as part of the following steps if desired.

-
6. To process .ANN files in a particular directory location:
 - a. Select **Menu > Load Annotations from Directory**.
 - b. Click **OK** in response to the message.
 - c. In the Browse dialog box, navigate to and select the folder containing the .ANN files, then click **OK**. (The files may be in the selected folder and/or subordinate folders.)
 - d. In the resulting dialog box, click the redaction category to be used as the default, then click **Select**.
 - e. Wait as the utility searches for and processes .ANN files. The time required depends on several factors, such as the number of files, size of the case, number of annotations that are defined, and system resources.
 - f. In response to the success message, click **OK**. If problems occur during the import, this message will list the number of errors and an error log (.ERR file) will be placed in the folder you selected in step c.
 - g. Skip to step 8.
 7. To process an import file (for older versions of Summation):
 - a. Select **Menu > Load Annotations from Import File**.
 - b. Click **OK** in response to the message.
 - c. In the Browse dialog box, navigate to and select the needed import file, then click **OK**.
 - d. In the resulting dialog box, click the redaction category to be used as the default, then click **Select**.
 - e. Wait as the utility processes the import file. The time required depends on several factors, such as the number of pages listed in the file, size of the case, number of annotations that are defined, and system resources.
 - f. In response to the success message, click **OK**. If problems occur during the import, this message will list the number of errors and an error log (.ERR file) will be placed in the folder containing the import file.
 8. If errors were noted, review the .ERR file and determine corrective action.
 9. Click **Menu > Exit**.
 10. In the **Image** tab in Eclipse SE Desktop, review images to which annotations were added. If problems exist, make corrections in Eclipse SE Desktop.

Importing OCR Files

Overview

Once a case is defined and case data is imported using one of the previous procedures, OCR files (plain text files containing image OCR) can be imported from a local or network folder. Note:

- Files will be imported if:
 - Files are named with image keys that correspond to image keys existing in your case.
 - The first line in each file contains the image key, in the format <<IMAGE_KEY>>.
- For document-level OCR files, files named with the image key of the first page of document will be imported.



NOTE: Data in the EXTRACTEDTEXT field will be overwritten with the OCR content that you import.

Import Procedure


To import document- or page-OCR from text files:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Import/Export** menu and click **Import OCR**.
3. On the Import OCR workspace, select the needed client and case.
4. Select the **Page Based** or **Document Based** option, depending on the contents of your OCR files:
 - **Page-based:** Select this option if one text file exists for each page. For each page, OCR will be appended and added to the document's EXTRACTEDTEXT field. The system checks the text files to determine which files goes with which document based on the image key. As soon as all OCR is found for the document, the system applies the OCR to the EXTRACTEDTEXT field and saves it to the database. The system then looks for text files for the next document.
 - **Document-based:** Select this option if one text file exists for each document. The system "bulk inserts" OCR for all documents at one time.

-
5. **Index After Import:** If you selected **Document-based**, select this option if you do not want to index the OCR files for search purposes at this time. (This option does not apply to the **Page-based** option because indexing occurs "on the fly" with that option.)



NOTE: If OCR files are not indexed when they are first imported (for example, to save time), you can build the OCR index later. See "[Working with Case Tools](#)" on page 6-40.

6. **Image Key Option:** Select the method of image key identification, **File Name** or **First Line in File**.
7. Enter a full path to the folder containing the OCR files or click  and navigate to the needed folder.
8. If the files are contained in multiple folders in the location specified in [step 7](#), click the **Include Subdirectories** option.
9. To save the import settings (for example, for future import jobs or to complete this import at a later time), click **Save Import Settings**. When the save is complete, a message displays in the Eclipse SE Administration status bar.
10. When you are ready to import the file(s), click **Import**. Wait as files are processed; a progress bar indicates job status.
11. After the import completes, note important information in the status bar. Click **View Log File** to check details of the import.
12. Verify the import by reviewing case details as explained in [Chapter 11](#).


Importing Production History


Overview

If you have image files from a production job created in an application other than Eclipse Administration, importing them using the following procedure will make them available for display in Eclipse SE Desktop in the **Production History** tab. (Images or PDF files created as described in [Chapter 16](#) are automatically available in that tab.)

Import Procedure

To import production history files:

1. Getting started:
 - a. Before you begin, make sure production files are available to the computer on which the import will be performed. For example, if they are in a network location, ensure that the Eclipse SE Administration computer has access to that location.
 - b. Identify (or create) the case into which the files will be imported.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Import/Export** menu and click **Import Production History**.
4. Review the Import Production History workspace and ensure you have needed information. For example, make sure you know which delimiters are used in the image load file.
5. Select the needed client and case; complete workspace entries as described in the following steps.
6. **Cross Reference File:** Enter the path to, or click  and navigate to, the needed cross-reference file. Cross-reference files map original image keys to those created during production and may be in one of the following formats: .XFS, .XFD, .CSV, .TXT, or .DAT. These files may be manually created (such as ASCII delimited text files) or may come from another Ipro application (such as Ipro Build).

7. **Image Load File:** Enter the path to, or click  and navigate to, the needed production image load file. This is the load file created during production (an .LFP or .OPT file), which identifies records by the produced image key.
8. **Delimiters:** Select the delimiters used in the image load file.
 - **Field:** Select the character that separates each field.
 - **Quote:** This optional delimiter typically marks the beginning and end of a field (as in .CSV files).
9. **Production Name:** Enter a meaningful name for the set of production images. This name is listed in Eclipse SE Desktop on the **Production History** tab and also in the Eclipse SE Administration **Production History** tab (should you want to produce a case based on an imported production).
10. **Date Produced:** The current date is automatically added; enter a different date if needed. This date displays in the Eclipse SE Administration **Production History** tab.
11. Evaluate the sample data to ensure it represents case data as expected. If not, review your cross-reference and load files and the delimiters defined. Make changes as needed.
12. When data appears correctly, click **Import Production Job**.
13. After the import completes, complete the following steps as needed:
 - Click **View Log File** to check details of the import.
 - Check the production history images on the **Production History** tab in Eclipse SE Desktop.
14. Inform your users that the production history images are available in the case and explain proper use of these files in their case review.

Importing Ipro Classic Suite Projects

Overview

If you have used Ipro Classic Suite products to manage cases, you can easily import case data and files directly into an existing Eclipse SE case. Most annotations applied in Ipro View can be imported.

In addition to image file, native files and OCR text files can be imported.

Import Procedure

To import case data and files from Ipro Classic Suite (referred to as “Ipro Suite” in this procedure):

1. Getting started:
 - a. Before you begin, make sure you have access to the Ipro Suite system directory and appropriate login credentials for Ipro Suite.
 - b. Identify the Ipro Suite project to be imported.
 - c. Identify (or create) the case into which the Ipro Suite project will be imported.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Import/Export** menu and click **Import from Ipro Suite**.
4. Review the Import from Ipro Suite workspace and make needed decisions about the import options. For example, decide on which annotations you will import (highlights, sticky notes, mark-ups, and/or embedded text).
5. Select the needed Eclipse SE client and case; complete workspace entries as described in the following steps.
6. **Ipro 8.7 Suite System Directory:**
 - a. Enter the full UNC path for the Ipro Suite system directory.
 - b. Click **Suite Login**, enter the Ipro Suite user name and password, and click **OK**.
7. Select the needed **Ipro Suite Case** (project).
8. **Import Options:** Select the items from the Ipro Classic Suite project to be imported into the Eclipse case. By default, only fielded data and image files are imported.

-
9. **Tag Options:** If you selected **Import Tags** in step 5, select the way in which tags on the first page of each document will be treated. These tags can be applied as document tags ("Doc Tags" or as page tags). For details on tags in Eclipse SE, see "[About Eclipse SE tags](#)" on page 5-22.
 10. **Default Redaction Category:** If you selected **Import Redactions** in step 5, select the redaction that will be the default choice in Eclipse SE Desktop. This redaction will be the first one in the redaction palette.
 11. **Document Record Options:** Select the way in which the Ipro Suite documents (fielded data and image files) will be imported:
 - **Eclipse documents do NOT exist:** Select this option if you are importing Ipro Suite records into a new Eclipse SE case for which no data has been imported, or a case in which the Ipro Suite documents do not match any in the Eclipse SE case, as determined by a comparison of the data value(s) in the BEGDOC field.
 - **Eclipse documents already exist:** Select this option to import the image information from the Ipro Suite project to the Eclipse SE case. The image information for documents with matching image keys (BEGDOC values) will be updated; Ipro Suite image keys that do not match those in Eclipse SE will be *ignored*. This option uses the same methodology that is used when importing an .LFP file and selecting the **Overlay only** option.
 - **Create any missing documents:** Select this option to import the image information from the Ipro Suite project to the Eclipse SE case. The image information for documents with matching image keys (BEGDOC values) will be updated; Ipro Suite image keys that do not match those in Eclipse SE will be *added* as records to the case. This selection uses the same methodology that is used when importing an .LFP file and selecting the **Overlay/Append** option.
 12. Review your selections and make changes or corrections if needed.
 13. When the import definition is complete, click **Start**. Wait as the import is processed.
 14. After the import completes, click **View Log File** to check details of the import.

Exporting Case Data

About Exported Data

The content of your export file will depend on the type of export you select. The table on the following page explains what data will be exported by file type.

Before You Begin

Before you export case data from Eclipse SE, for greatest efficiency, “walk through” the four steps in Eclipse SE Administration. This will allow you to become familiar with the information you will need and the options you will have.

1. Review the table on page [8-43](#) to understand what can be exported for different file types.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Import/Export** menu and click the **Export Data** work task.
4. Beginning with the **Step 1** tab of the Export Data workspace, review and make a note of the decisions you need to make for each step. Refer to this guide for clarification on options and information required.

Getting Started with Exports

After completing the previous steps, continue as follows:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Import/Export** menu and click the **Export Data** work task.
3. Continue with procedures explained in this section.

Export File Types

File Type	Exported Data	
Fielded Data/Image Data		
.CSV ^a	<ul style="list-style-type: none"> • Extracted text 	<ul style="list-style-type: none"> • Field data
.DAT ^a	<ul style="list-style-type: none"> • Native file 	<ul style="list-style-type: none"> • Document-level tags
.LST	<ul style="list-style-type: none"> • Extracted text 	
.OLL	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Image Data		
.DII	<ul style="list-style-type: none"> • Page OCR 	<ul style="list-style-type: none"> • Image path
.DLF	<ul style="list-style-type: none"> • Image path • Page OCR • Extracted text • Native file • Redactions 	<ul style="list-style-type: none"> • Annotations^b • Document tags^c • Page tags^d • Word coordinates • Volumes
EDRM (.XML)	<ul style="list-style-type: none"> • Image path • Page OCR • Extracted text • Native file • Redactions 	<ul style="list-style-type: none"> • Annotations^b • Document tags^c • Page tags • Word coordinates • Volumes
.LFP	<ul style="list-style-type: none"> • Image path • Page OCR • Native file • Redactions 	<ul style="list-style-type: none"> • Annotations^b • Document tags^{c,d} • Page tags^d§ • Word coordinates • Volumes
Opticon (.OPT)	<ul style="list-style-type: none"> • Image path 	

a For .CSV and .DAT files, delimiters can be selected.

b Annotations include embedded text, sticky notes, highlights, and markups (lines).

c Private tags are not exported.

- d Document and/or page tags can be exported to an .LFP file, but take care in doing so, because the .LFP format does not differentiate between the two types of tags.

Step 1: Select Case

After completing "[Getting Started with Exports](#)" on page 8-42, select the case from which data is to be exported as follows:

1. In the Export Data workspace, select the **Client ID** and **Case** to be exported. If you are exporting to a Summation .DII file, ensure that the case has a field defined as EXTRACTEDTEXT.
2. In the Export Data workspace, while still under the **Select Case** tab, complete one of the following steps.

Select Entire Case

3. To select all data in the case, select the **Entire Case** option and skip to [step 8](#).

Select by Image Key Range

4. To select a subset of data based on image key, click the **Image Key Range** option, enter the starting and ending image key, then skip to [step 8](#).

Select by Advanced Search


5. To select a subset of data based on search criteria Desktop, complete the following steps:
Click the **Advanced Search** option.
 - a. Click **Build Search**.
 - b. Complete the Advanced Search dialog box as explained in the *Ipro Eclipse SE Search Reference*.
6. When the search completes, skip to [step 8](#).

Select by Production Set

7. To select a subset of data based on the production history, click the **Production History** option and then click the drop down menu in order to select the existing production job you would like to export.





Production History exports can only be selected from existing production jobs for the case you are working in. Once the appropriate production job has been selected, all database fields in "[Step 2: Select Output](#)" on page [8-45](#), will be automatically filled in to match the selected production job.

8. As needed, click  to refresh the document count to match the number of documents contained in the set chosen in [step 3](#), [step 4](#), [step 5](#), or [step 7](#).

Step 2: Select Output

To select the output location and define the file types to export:

1. In the Export Data workspace, click the **Step 3. Select Output** tab.
2. In the **Output Directory** field, enter the full path for the folder in which you want the export file(s) to be placed. Alternatively, click the  button and navigate to the needed folder in the Browse For Folder dialog box (or make a new folder in that dialog box).
3. **File Name:** Optional. Enter a file name if you want a name other than the name of the case to be used.
4. **Encoding:** Select the character set to be used. Common encodings are available for selection.
5. For each type of export file you want to create, complete the applicable section as explained in the following steps.
6. **Concordance:**
 - a. Select the **Concordance DAT** option.
 - b. Select **ASCII** or **Unicode**, depending on the version of Concordance file you want – version 9 and earlier or version 10 and later, respectively.
 - c. If needed, select different characters for the **Field Delimiter**, **Quote Delimiter**, and/or **Newline (Multivalue) Delimiter**.
7. **Summation:**
 - a. Select the **Summation DII** and/or **Summation LST** option. Note that the **LST** option is only applicable if you specify a path for document-level OCR files in [step d](#) below.

- b. For DII files, the following options are selected by default. If needed, clear one or both options.
 - Remove spaces...:** Spaces in field names will be omitted, for example, "Doc ID," will become "DocID." Required if field names include spaces.
 - Truncate...:** Field names longer than eight characters will be truncated. For example, "Document ID" will become "Document."
 - c. **@T Field:** If needed image keys are defined in a field other than the BEGDOC field, select the field. (For example, new image keys defined for production might be the preferred image keys; choose the field containing the production image keys.)
 - d. **Summation .LST:** Select this option if you are exporting document-level OCR (step d) and want an .LST file. (The .LST file contains image key and path, including text file name.)
 - e. **Document-level OCR:** If your case has a field defined as EXTRACTED-TEXT, that field contains OCR data, and you want document-level OCR exported to text files (one file per document), select the **Document-level** option under **Write OCR files to the path** and enter the path to the location where the files should be created. Alternatively, click  and navigate to the needed folder in the Browse For Folder dialog box (or make a new folder in that dialog box). Note that if your case has an EXTRACTEDTEXT field and you do not specify a path, the document-level OCR will be included in the exported file (within an @C line for each record).
 - f. **Page-level OCR:** If your case has page-level OCR and you want it exported to text files (one file per page), select **Page-level** and enter or navigate to the location where the files should be created.
8. **CSV:**
- a. Select the option and select the type of **Field Delimiter**. This is the delimiter to be used to separate fields. For a custom delimiter, complete steps b - f. Otherwise skip to step g.
 - b. In the **Field Delimiter** list, select **Custom**.
 - c. In the Create Custom Delimiter dialog box, click the **Characters** or **ASCII Values** option, depending on how you will specify the delimiter character(s).
 - d. If you select **Characters**, enter the character(s) in the top field under the **Characters** option. Separate more than one character with a space. The ASCII value for each character appears in the bottom field.

- e. If you select **ASCII Values**, enter the ASCII value(s) for the needed character(s) in the top field under the **ASCII Values** option. Separate more than one value with a space. The character corresponding to each value appears in the bottom field.
 - f. When finished, click **OK**.
 - g. If you have MULTI_VALUE fields, enter the **Multivalue Delimiter** character that separates the values within the field. The default delimiter is a semicolon, which is a common delimiter in email TO: and CC: fields.
9. **Other Loadfiles:** Select the other types of files you want to export.



NOTE: If exporting to an EDRM file, note that existing case DOCKEY and BEGDOC references and naming conventions will be included in the EDRM file, regardless of your export selections. (When the EDRM option is selected for export, a warning message will remind you of this fact as you start the export.) See [Appendix C](#) for details on EDRM file contents.



10. **Items to Export:** As applicable to the type of file you are exporting, select items to be included in the file. For example, for an .LFP load file, if only the .LFP option is selected, only the IM, OI, OF lines are included in the export file. When additional items are selected (such as tags²⁴ or annotations), all lines are populated (such as IS and AN lines).
11. To sort data in any load files you create, select up to three fields and the sort order (ascending or descending). This may be especially useful if you base the export on a search. The following example shows that data will be sorted first by author, then by the creation date.

Author	▼	Ascending	▼
Creation Date	▼	Ascending	▼
<none>	▼	Ascending	▼

12. When selections are completed on the **Step 2** tab, continue with "[Step 1: Select Case](#)" on page 8-44.

24. If you elect to include document and/or page tags in your .LFP file, exported tags will be included as "IS" lines in the .LFP file. These IS lines do not differentiate between page- and document-level tags. Thus, importing the .LFP into a different system will result in all page tags.

Select Fields

1. When selections are completed on the **Step 3** tab, continue with "[Step 1: Select Case](#)" on page 8-44.
2. In the right pane of the **Step 1** tab, evaluate the list on the **Database Fields** tab and select the fields to be included in the export file. Note:
 - To choose all fields in the case, click the **Select All** option.
 - To clear all selected fields, click the **Select All** option.
 - Select individual fields by clicking next to the fields to be included.
 - If needed, change the order of selected fields. To do so, select a field, then click the up or down arrows,  or , to move the field to the needed location. Repeat as needed to move other fields.
 - **Summation only:** If you are exporting to a Summation .DII file, make sure the BEGDOC field is the first field listed and the EXTRACTEDTEXT field is the second field.²⁵
 - If exporting page-based OCR, only the BEGDOC field needs to be selected.
 - If any selected field name includes parentheses as its first and last characters, the parentheses will be omitted in the exported case. For example, the field name **(AUTHOR)** will export as **AUTHOR**. Field names containing parentheses within the name, such as **AUTHOR(S)**, will include the parentheses.
3. When selections are completed on the **Step 1** tab, continue with "[Step 1: Select Case](#)" on page 8-44.
4. To sort data in any load files you create, select up to three fields and the sort order (ascending or descending). This may be especially useful if you base the export on a search. The following example shows that data will be sorted first by author, then by the creation date.



-**NOTE:** The **System Field** tab lists the _DOCID and _DOCTAGS fields; see "[System-generated fields](#)" on page 5-13 to determine if they should be selected for export.

25. If you define another field for the image key (@T field in [step 7](#) in "[Step 2: Select Output](#)" on page 8-45, make sure it is the first field in the list.

Author	▼	Ascending	▼
Creation Date	▼	Ascending	▼
<none>	▼	Ascending	▼

5. When selections are completed on the **Step 2** tab, continue with "[Step 1: Select Case](#)" on page [8-44](#).

Step 3: Finish

To export the data you have specified:

1. In the Export Data workspace, click the **Step 4. Finish** tab.
2. Evaluate, and change if needed, the **Export Block Size** (default 100), which is the number of documents to be processed at one time. Factors to consider include size of the case, size of the export job, amount of content in EXTRACTED TEXT fields, system capabilities, and other factors.

When exporting very large numbers of documents, the block size may need to be significantly smaller than the number of documents being exported.
3. Click **Start Export**. If you selected an EDRM load file for export, a warning message will display as a reminder. If this occurs, click **Yes** to continue, or **No** to stop the export and select another type of load file. (See the note in [step 9](#) of the Select Output procedure.)
4. When the export is complete, click **OK** in response to the confirmation message.
5. Review the details shown on the **Step 4** tab. Note that .CSE and VOLUMELIST.DLF files are always created.
6. If desired, select one of the exported files and click **View File** to see the contents of the file.

Exporting a Case Definition File

After you create a case, Eclipse SE Administration allows you to export the definition to make it easy to create future cases that share similar characteristics. Case data is not included. (A case definition file can be created whether or not data has been added to the case.)

For details about case definition files and how to export them, see "[Exporting a Case Definition File](#)" on page 6-6.

Publishing a Case

Overview

About publishing

Ipro Publish is an optional companion application that allows you to create a runtime version of Ipro Eclipse SE Desktop for a single case. You can use an active Eclipse SE case, a .DLF or other load file, or a collection of images from Ipro Classic Suite as the source of the Ipro Publish case.

The runtime version of Eclipse SE Desktop (also called "stand-alone viewer") allows a user, for example, a temporary consultant, to perform needed review activities without having an explicit Ipro Eclipse SE license. Cases can also be published as read-only, to allow users to view, but not change, a case.

If you have purchased Ipro Publish in conjunction with Eclipse SE, complete the following procedures to publish cases. Ipro Publish can also be used as a stand-alone application (also refer to the following procedures).

Limitations

The following Eclipse SE functions are not available in published cases:

- TIFF-on-the-Fly
- Scanning
- Merge/Split Documents
- View History
- Import Transcripts

Preparation

Before publishing a case, review Ipro Publish options:


1. Start Eclipse SE Administration and log in as an administrator.
If you are using Ipro Publish as a stand-alone application, double-click the **Publish** icon (placed on your desktop during installation) and skip to [step 4](#).
2. Click the **Case Management** tab.
3. In the navigation panel, expand the **Import/Export** menu and click **Publish Data**.
4. In Ipro Publish, click the tab corresponding to the source of data to be published:
 - Publish from Eclipse SE Case
 - Publish from .DLF file (for Eclipse)
 - Publish from Load file (for any other type of data)
 - Publish from Ipro Classic Suite (for a collection of images from Ipro Classic Suite)
5. Review the options and information you will need.
6. Gather needed details and take required actions. For example:
 - To publish a case based on a saved search in Eclipse SE, ensure the needed search has been saved. For details on saved searches, see the *Ipro Eclipse SE Search Reference*.
 - To publish a case from a load file, ensure that you have the needed files (such as .CSV, .DAT, or .TXT plus .LFP).
7. Continue with the appropriate procedure:
 - ["Publishing an Eclipse SE Case"](#) on page 8-52
 - ["Publishing a .DLF File"](#) on page 8-55
 - ["Publishing a Load File"](#) on page 8-57
 - ["Publish an Ipro Classic Suite Case"](#) on page 8-63

Publishing an Eclipse SE Case

To publish data from an Eclipse SE case:


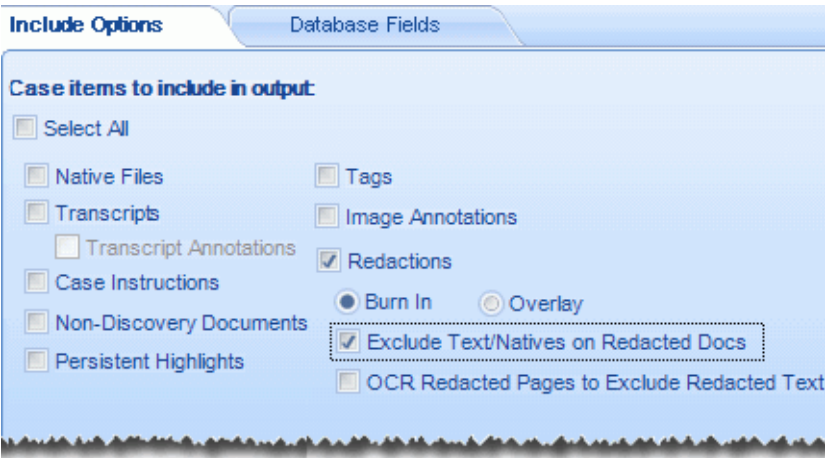
1. Complete "[Preparation](#)" on page [8-51](#).
2. In Ipro Publish, click the **Publish from Eclipse SE Case** tab.
3. Select the needed client and case (available clients/cases are based on your Eclipse SE credentials and assignments).
4. Select the documents to be published:

Selecting Documents

Option	Description
Entire Case	Select this option to publish all documents in the case. The total number of documents displays at the bottom of the tab.
Saved Search	Select this option and choose the needed search to publish a set of documents matching the criteria of the saved search.
Specific Documents using a File List	<p>Select this option to publish a set of documents listed in a plain text file (details below).</p> <p>In the corresponding field:</p> <ul style="list-style-type: none"> • type the full path and filename of the needed file, or • click  to select the file, then click OK. <p>The file should be the file should include one image key per line and/or one range of image keys per line. Indicate a range with a comma. For example, consider a set of single-page documents beginning with image key ABC-001. To produce the first two documents along with documents 100 through 300, the file would include the lines shown in this figure.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"> <p>ABC-001 ABC-002 ABC-100 ,ABC-300</p> </div>
Limit output to maximum documents	<p>After selecting the main document set, choose this option to limit the set to a maximum number of documents. (Documents are counted beginning with the first document in the set.)</p> <p>This is the total number of documents, not pages. (If you enter 100, for example, and each document has 10 pages, then the total will be 1,000).</p>

5. Select output details:

Output Options for Eclipse SE

Option	Description
Output Directory	Enter the full path for the folder in which you want the published file(s) to be placed. Or, click the  button to navigate to and select the needed folder.
Destination Case Name	Enter a name for the case. Avoid characters that are not allowed in Microsoft Windows, such as backslash or colon.
Include Options tab	<p>Select the case components to be included with the published case, as shown in the following figure. See also notes following the figure.</p> 
NOTES: Transcripts	If you include transcripts, you can optionally include transcript annotations, which includes all annotation types (issue tags, notes, etc.)

Output Options for Eclipse SE (Continued)



Option	Description
<p>Redactions</p> <p>If you include redactions, select the way they will be included in the image:</p> <ul style="list-style-type: none"> • Burn in: Redactions are integrated into image and cannot be edited. • Overlay: Redactions are included as Eclipse SE components that can be edited. • Exclude Text/Natives on Redacted Docs: If redactions are burned in, do not publish extracted text and/or native files. • OCR Redacted Pages to Exclude Redacted Text: If you choose the previous ("Exclude") option, you can select this option to re-OCR your text files to include all text that is <i>not</i> redacted. Selecting this option may impact the efficiency of the publish process. <p>Tags</p> <p>If you include tags, after you select the option, click the Select Tags tab and select the tags to be published.</p>	
Database Fields tab	Select all or some of the fields in the case. The BEG-DOC field is included by default; all others are optional.
Include Viewer Install	Select this option if intended recipients of the published case do not have Eclipse SE Desktop; a stand-alone version of the application will be included.
Make Published Case READ ONLY	Select this option if users should be able to view documents but not modify them in any way.

6. When all items have been selected, click **Publish**. Wait as the case is published.
7. After the case is published, make it accessible to the reviewer(s) who should have access to it as explained in "[Distributing a Case](#)" on page 8-69.

Publishing a .DLF File


Complete the following steps to publish data using a .DLF file. Note that Eclipse system field types that do not exist in Eclipse SE will be defined with an appropriate field type. (For example, the Eclipse HASIMAGE field will be a SINGLE_VALUE field in the published case.)

1. Complete "[Preparation](#)" on page 8-51.
2. In Ipro Publish, click the **Publish from .DLF File** tab. Review the tab to ensure that you have the needed details and files.
3. Enter needed input details:

Item	Description
Case Definition (.CSE) file	For each of these entries, enter the full path and name of the listed file. Or, click the  button to navigate to and select the needed file.
Data (.DLF) file	
Volume (.DLF) file	
	 NOTE: The Volume file is the VOLUMESLIST.DLF file that is created along with the data .DLF file.

4. Select output details:

Output Options for .DLF Files

Option	Description
Output Directory	Enter the full path for the folder in which you want the published file(s) to be placed. Or, click the  button to navigate to and select the needed folder.
Destination Case Name	Enter a name for the case. Avoid characters that are not allowed in Microsoft Windows, such as backslash or colon.
Options - Select available options as needed.	
Native Files	Include native files associated with the case.
Make Published Case Read Only	Select this option if users should be able to view documents but not modify them in any way.

Output Options for .DLF Files (Continued)


Option	Description
Include Viewer Install	Select this option if intended recipients of the published case do not have Eclipse SE Desktop; a stand-alone version of the application will be included.
Burn-in Redactions	Redactions are integrated into image and cannot be edited. If this option is not selected, redactions will be included as Eclipse SE components that can be edited.
Exclude Extracted Text/Native Files on Redacted Documents	If redactions are burned in, select this option to omit extracted text and/or native files from the published case.

5. When all items in the **Publish from .DLF Loadfile** tab have been addressed and reviewed, click **Publish**. Wait as the case is published.
6. After the case is published, make it accessible to the reviewer(s) who should have access to it as explained in "[Distributing a Case](#)" on page 8-69.


Publishing a Load File

Publish a case from a .CSV, .DAT, or .TXT load file, plus a corresponding .LFP file, as follows:

1. Complete "[Preparation](#)" on page 8-51.
2. In Ipro Publish, click the **Publish from Load File** tab.
3. Review the tab to ensure that you have the needed details and files.
4. **Input:** Enter and/or select needed input details:

Item	Description
Input Load File	For each of these entries, enter the full path and name of the listed file. Or, click the  button to navigate to and select the needed file. TIP: To select a .DAT or .TXT file, you may need to change the Files of Type selection in the Open dialog box.
Input .LFP file	

5. **Output:** Enter and/or select the following details:

Item	Description
Output Directory	Enter the full path for the folder in which you want the published file(s) to be placed. Or, click the  button to navigate to and select the needed folder.
Case Name	Enter a name for the published case. Avoid characters that are not allowed in Microsoft Windows, such as backslash or colon.

6. **Basic options:** Select from the following options:

Basic and Case Options for Load Files

Item	Description
Make Published Case Read Only	Select this option if users should be able to view documents but not modify them in any way.

Basic and Case Options for Load Files (Continued)


Item	Description
Include Viewer Install	Select this option if intended recipients of the published case do not have Eclipse SE Desktop; a standalone version of the application will be included.
Burn-in Redactions	Select this option to integrate redactions into image so that they cannot be edited. If this option is <i>not</i> selected, redactions will be included as Eclipse SE components that can be edited in the published case.
Use White	Select this option if you are burning in redactions and want all redactions to be white.
Exclude Extracted Text/Native Files on Redacted Docs	If redactions will be burned in, select this option to omit extracted text and/or native files from the published case.
Stopwords	<p>To exclude common words from searching in the published case:</p> <ol style="list-style-type: none"> 1. Click Modify next to the Stopwords field. 2. In the Modify Stop Words dialog box, select the source of words to be excluded (or skip to step 3 to enter the words manually): <ul style="list-style-type: none"> - Load Default Stop Words: Click this button to include a basic set of 128 common words. - Load from File: Click this button to select a .TXT file^a containing the needed stop words. When the file is loaded, words will be listed in the Modify Stop Words dialog box. 3. As needed, add (one word per line), delete, or change words dialog box. 4. When finished, click Save in the dialog box. The number of words you have defined displays in the Stopwords field.

Basic and Case Options for Load Files (Continued)

Item	Description
Import Date Format	<p>If dates in your load file are in one of the following formats, select the format from this list to define the field as the DATE field type instead of as plain text (SINGLE_VALUE field type):</p> <ul style="list-style-type: none"> • mm/dd/yyyy • dd/mm/yyyy • yyyy/mm/dd • yyyymmdd <p>DATE fields support sorting, tallying, and other actions.</p> <p>If the dates in your load file do not match the listed formats, or you want dates to be treated as plain text, select None.</p>

a In the file, words may be included on separate lines or separated by spaces.

7. **Delimiters:** Ensure that delimiters are correctly defined and fields are being populated correctly:
 - a. Review the field **Sample Data** in the bottom portion of the tab.
 - b. If problems exist with the sample data, take one or more of the following actions as needed.
 - c. Select or clear the **First Line Includes Headers** option.
 - d. Evaluate the delimiters listed in the **Record Delimiters** area and change as needed. Choose **Default .CSV** or **.DAT** delimiters, or custom delimiters if they exist in your file.
 - e. To apply changes to the sample data, click **Load/Refresh Data Fields**.

 **NOTE:** Clicking this button re-loads original load-file data. If you click it after you complete [step 8](#), a warning will allow you to either return the original data or to cancel the action.
 - f. To evaluate data for another record, click **Next** (or **Prev**) **Record**. Repeat if needed to ensure data is correct.

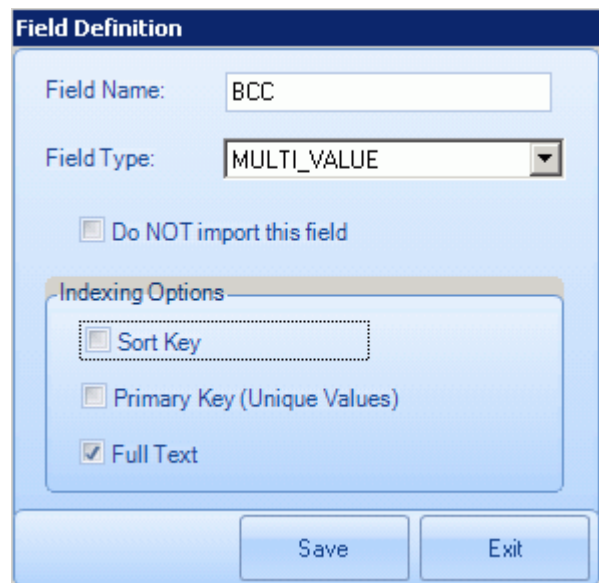
8. **Fields:** Ensure that only the fields needed in the published case are included and that field type and proper indexing/sort options are selected. Proper field definition is particularly important for system fields (BEGDOC, EXTRACTEDTEXT, etc.), and ensures that users can work effectively in the published case.

Unneeded fields

- a. Double-click a field that is *not* needed. The Field Definition dialog box opens as shown in this figure.
- b. In the Field Definition dialog box, select the **Do NOT import this field** option.
- c. Click **Save**.
- d. Repeat steps a–c for each field to be excluded.

Field definitions

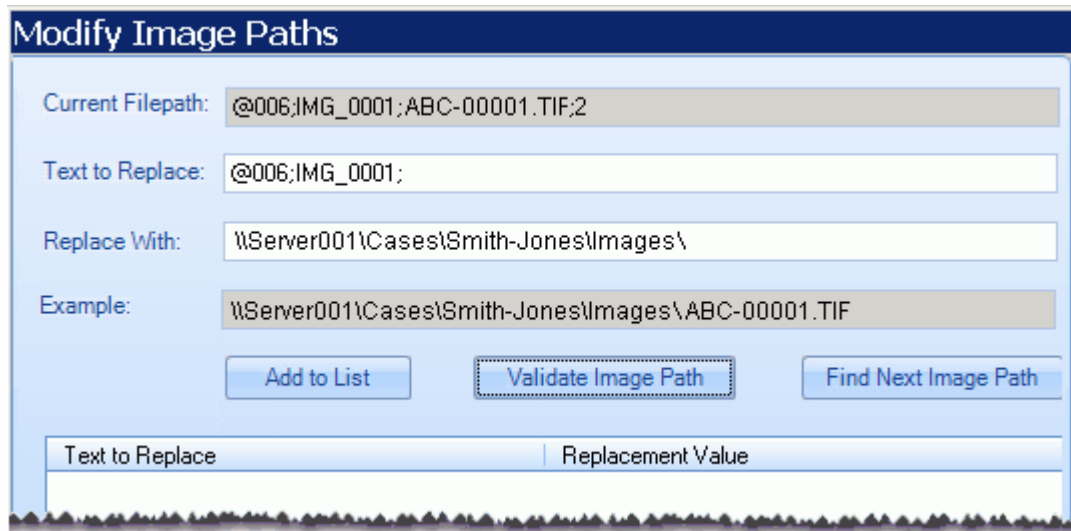
- e. Double click a field for which the definition needs to be modified.
- f. In the Field Definition dialog box:
 - Change the field name (typically not done).
 - Select the correct field type. See ["About Eclipse SE database fields"](#) on page 5-12 for details.
 - Select sorting and/or indexing options. See ["Field Options and Flags"](#) on page 5-18 for details.
- g. Click **Save**.
- h. Repeat steps e–g for each field to be defined.
- i. Once the EXTRACTEDTEXT field is defined as such, select the **Extracted Text field contains File Name** option if the data load file (.DAT or .CSV file - not .LFP file) for your case includes a path/filename for text files instead of actual text in the field.
- j. When finished, review the field list to ensure all details are as intended. The following figure shows an example.



Field Name	Import	Field Type	Indexing Type	Sample Data
BEGATTACH	Yes	BEGATTACH	PK	
BEGDOC	Yes	BEGDOC	PK	ABC-0000034897
BODY	Yes	EXTRACTEDTEXT	FT	***** EDRM Email Data Set has
BYTE_COUNT	Skip	SINGLE_VALUE		
CATEGORY	Skip	SINGLE_VALUE		
CC	Yes	MULTI_VALUE	FT	
GROUP_OUT_ID	Skip	SINGLE_VALUE	FT	

Load-File Fields Defined for Publishing

9. **Image File Paths:** Ensure path information for image files is correct:
 - a. At the bottom of the tab, click **Modify File Paths**.
 - b. Click **Image File Path**.
 - c. Review the **Current Filepath** (the path in the load file).
 - d. If the load-file path matches the current file location, skip to [step h](#). If the path is not correct, in the **Text to Replace** field, enter the part of the path that needs to be corrected (for example, an incorrect network path or volume designator).
 - e. In the **Replace With** field, enter the correct path.
 - f. Review the **Example** click **Validate Image Path** to ensure that the entry is correct. The following figure shows a typical correction.



Path Validation

- g. Click **Add to List** to save this path.
 - h. Click **Find Next Image Path** to search for another path in the load file.
 - i. If another path is found, repeat these steps to correct the next path and search for other paths.
 - j. When all paths have been found, click **Save**.
10. **Native File Paths:** If your case includes native files, repeat [step b](#), except click **Native File Path** in the Select File path Type dialog box.
 11. **Text File Paths:** If your case includes text files, repeat [step b](#), except click one of the following buttons in the Select File Path Type dialog box:
 - **OCR File Path:** If text files are defined in your .LFP file, click this button to verify/correct the file path for the text files.
 - **Extracted Text File Path:** If you selected the **Extracted text field contains File Name** option, click this button to verify/correct the file path for the text files.
 12. When all items in the **Publish from Load File** tab have been addressed and reviewed, click **Publish**. Wait as the case is published.
 13. After the case is published, make it accessible to the reviewer(s) who should access it as explained in "[Distributing a Case](#)" on page [8-69](#).

Publish an Ipro Classic Suite Case

The following procedures assume that an authorized version of Ipro Classic Suite and an authorized version of Publish are successfully installed and set up with cases/projects.

After completing "[Preparation](#)" on page [8-51](#), publish a collection of images from Ipro Classic Suite (referred to as "Ipro Suite" in this procedure) as follows:

1. Complete "[Preparation](#)" on page [8-51](#).
2. In Ipro Publish, click the **Publish from Ipro Suite** tab.
3. Log in to Ipro Suite:
 - a. Click **Login to Ipro Suite**.
 - b. Enter the **Suite User ID** and **Password**.
 - c. If necessary, navigate to the **System Directory** where the Ipro Suite authorization resides.
 - d. Click **Login**.
4. In Publish, select the needed case.
5. Click the **Set Ipro Suite Load Options** button to open the Ipro Suite Options dialog box and select from the **Publish Options** listed in the following table.

Option	Description
Include Native Files	Include native files associated with the case.
Include Tags	Include issue tags that were applied to the image.
Include Redactions	Include redactions that were applied to the image as an Overlay. These redactions can be edited. Optionally also select: <ul style="list-style-type: none"> • Burn In Redactions: Redactions will be integrated into image (user will not be able to edit them). • Exclude Text/Native if Redacted: If redactions are burned in, extracted text and/or native files will not be published.
Include Annotations	Includes sticky notes, highlights, and markups that were applied to the image.

Option	Description
Include Folder Descriptions	<p>Select this option if you want to include the folder descriptions that were assigned to the project. Folder descriptions can exist at any boundary level except for page. Page is not a boundary level.</p> <p>All documents within a given folder will also include the folder description. If a document has a parent or a child boundary-level description, it will be appended to the folder description (for that document). For example:</p> <pre>DOC-0001 Folder description DOC-0002 Folder description; parent boundary description DOC-0003 Folder description</pre>

6. If you are including tags, select **Tag Options**:



Option	Description
Assign first page tags as Doc Tags	Tags applied to the first page of a document will be applied as document tags in Eclipse SE Desktop. Tags on the document's successive pages will be applied as page tags.
Assign all tags as Page Tags	Tags applied to the first page of a document will be applied as page tags in Eclipse SE Desktop. Tags on the document's successive pages will also be applied as page tags.

7. When the Ipro Suite Options dialog box is completed, click **Done**.
8. Select the input options:

Input Options for Ipro Suite


Option	Description
Publish Entire Case	All images in the case will be published.

Input Options for Ipro Suite (Continued)

Option	Description
Image Key Range	When the Publish button is clicked, the Beg/End Range dialog appears prompting for a starting image key and an ending image key. Only those images within the entered range are published.
File of BEG/END Ranges	Select this option and complete the Input File field. For this option, the file is a text file with boundary ranges. Each line in the file has a beginning and an ending image key range separated by a comma.
Tag/Issue Collection	Select this option to use images from a project associated with a specific Ipro issue tag which is resolved to a boundary level, e.g. Document Attachment Page.
Document Load File	Select this option and complete the Input File field. For this option, the file can be a .CSV, .DAT, or .TXT file. See step 10 for information about the Record Delimiters.
Input File	Required for File of BEG/END Ranges and Document Load File options. See the specific options in this table for details; click  to navigate to and select the needed file.
Output Directory	Enter the full path for the folder in which you want the published file(s) to be placed. Or, click  to navigate to and select the needed folder.
Case Name	Enter a name for the published case. Avoid characters that are not allowed in Microsoft Windows, such as backslash or colon.

9. Select the basic **Case Options**:

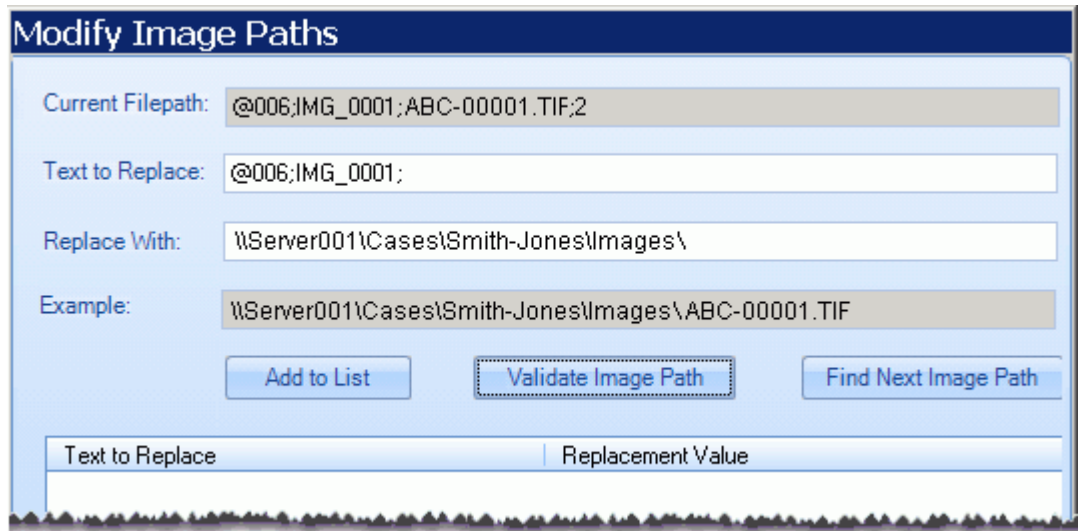
Basic and Case Options for Ipro Suite

Option	Description
Stopwords	<p>To exclude common words from searching in the published case:</p> <ol style="list-style-type: none"> 1. Click Modify next to the Stopwords field. 2. In the Modify Stop Words dialog box, select the source of words to be excluded (or skip to step 3 to enter the words manually): <ul style="list-style-type: none"> - Load Default Stop Words: Click this button to include a basic set of 128 common words. - Load from File: Click this button to select a .TXT file containing the needed stop words. <p> In the .TXT file, words may be included on separate lines or separated by spaces.</p> <p>When the file is loaded, words will be listed in the Modify Stop Words dialog box.</p> 3. As needed, add (one word per line), delete, or change words dialog box. 4. When finished, click Save in the dialog box. The number of words you have defined displays in the Stopwords field.
Import Date Format	<p>If dates in your load file are in one of the following formats, select the format from this list to define the field as the DATE field type instead of as plain text (TEXT_TS field type):</p> <ul style="list-style-type: none"> • mm/dd/yyyy • dd/mm/yyyy • yyyy/mm/dd • yyymmdd <p>DATE fields support sorting, tallying, and other actions. If the dates in your load file do not match the listed formats, or you want dates to be treated as plain text, select None.</p>
Include Viewer Install	<p>Select this option if intended recipients of the published case do not have Eclipse SE Desktop; a standalone version of the application will be included.</p>

Basic and Case Options for Ipro Suite (Continued)

Option	Description
Make Published Case Read Only	Select this option if users should be able to view documents but not modify them in any way.

10. For the Document Load File options, ensure that the delimiters are correctly defined by viewing the sample data that appears in the lower half of the Publish interface. Should modifications be necessary, take one or more of the following actions as needed:
 - a. Select or clear the **First Line Includes Headers** option in the **Record Delimiters** section of the tab.
 - b. Choose default .CSV or .DAT delimiters, or custom delimiters if they exist in your file.
 - c. To apply changes to the sample data, click **Load/Refresh Data Fields**.
 - d. To evaluate another record, click **Next** (or **Prev**) **Record**. Repeat if needed to ensure selections are correct.
11. Ensure path information for image files is correct:
 - a. At the bottom of the tab, click **Modify File Paths**.
 - b. Click **Image File Path**.
 - c. Review the **Current Filepath** (the path in the load file).
 - d. If the load-file path matches the current file location, skip to step h. If the path is not correct, in the **Text to Replace** field, enter the part of the path that needs to be corrected (for example, an incorrect network path or volume designator).
 - e. In the **Replace With** field, enter the correct path.
 - f. Review the **Example** click **Validate Image Path** to ensure that the entry is correct. The following figure shows a typical correction.



Path Validation

- g. Click **Add to List** to save this path.
 - h. Click **Find Next Image Path** to search for another path in the load file.
 - i. If another path is found, repeat these steps to correct the next path and search for other paths.
 - j. When all paths have been found, click **Save**.
12. If your case includes native files, repeat [step 11](#), except click **Native File Path** in the Select File path Type dialog box.
 13. If your case includes text files, repeat [step 11](#), except click **OCR File Path** in the Select File path Type dialog box.
 14. When all items in the Publish from Ipro Suite tab have been addressed and reviewed, click **Publish**. Wait as the case is published.
 15. After the case is published, make it accessible to the reviewer(s) who should access it as explained in "[Distributing a Case](#)" on page [8-69](#).

Distributing a Case

After a case is published, the person responsible for managing the published case should complete the following steps to distribute the case to intended recipients:

1. Ensure that the published-case folder is in a location that is accessible to the recipient, such as in a network location. The recipient must be able to copy the published-case folder to their computer and use it on their local drive.
2. Provide recipient with case-specific instructions, for example:
 - Where the published-case folder resides.
 - Which activities should be completed (viewing, redacting, tagging, etc.).
 - If Eclipse SE (the full application) is installed at the recipient's site, how he or she should log in to the published case.



NOTE: If recipients will be using their own Eclipse SE, they will typically log in with their regular Eclipse SE credentials (although credentials are not required to open a published case). Note:

- User actions in a published case are tracked for history reporting purposes. If the user opens the published case without entering credentials, the user will be identified as "Publish" in Eclipse SE history reports.
 - Users who enter credentials will be able to create private tags for their own use.
 - Restrictions to user privileges are not recognized when users are reviewing a published case.
-
- If applicable, details on a) exporting the reviewed case (i.e., what content to export) and b) returning it to the person managing the published case.
3. Instruct the recipient to complete the following steps.

Recipient steps

Recipients of a published case will use one of the following programs to review a case:

- A full version of Eclipse SE Desktop that is available at their site.
- The stand-alone version of Eclipse SE Desktop (also called “stand-alone viewer”) that is installed with published cases. This version does not include all features; review ["Limitations"](#) on page [8-50](#).

The stand-alone version of Eclipse SE must be used if a case is restricted to view-only

Administrators should explain which version reviewers will be using and also provide the following procedure.

To review a published case:

1. Open the case as explained in [step 2](#) or [step 3](#), depending on whether or not you have Eclipse SE.
2. To open the case using a full version of Eclipse SE Desktop:
 - a. Start Eclipse SE.
 - b. In the Desktop Login dialog box, enter your login credentials.
 - c. Click **Local**, then navigate to and open the .EM! file in the folder containing published case files.
 - d. Skip to step [step 4](#).
3. To open the case using the standalone version of Eclipse SE Desktop:
 - a. Open the folder containing the published case files.
 - b. Double-click LaunchViewer.exe. The case opens in the standalone version of Eclipse SE.
 - c. Go to the next step.
4. If the published case data/files are on a DVD or CD (or are read-only), you will be alerted to copy the files to your local drive. If this occurs, follow the onscreen prompts to select an appropriate local folder for the files. The copied files will be used for the review.
5. Review the case. For assistance on using the Eclipse SE Desktop, select **Help** from the Eclipse SE button menu.
6. When review of the published case is completed, export case files and return them if so instructed.

9 Processing Image, Native, and OCR Files

In this Chapter

Overview	9-1
Ingesting Image Files	9-3
Ingesting Native Files	9-9
Creating Multiple Document Images (Bulk TIFF)	9-22
Creating OCR for Multiple Documents (Bulk OCR)	9-24

Overview

Eclipse SE provides several simple-to-use tools for dealing with image, native, and OCR text files that need to be added to a case without a load file, or are missing from a case.

Adding Files without a Load File

Ipro Eclipse SE makes it easy to add image or native files to your case when no load file exists. This process is called “ingestion.”

Starting in Eclipse SE 2016.3.2, the following features are available:

- The optional Eclipse SE Streaming module provides faster processing of native files. It also allows password-protected files to be fully ingested when a password list is provided. (See also "[Privileges and Conditions Required](#)" on page 9-2.)
- The SE Streaming module also provides Deduplication, which gives you the ability to identify and remove duplicates from the ingested native files, at either the custodian or case level.
- Also available with the SE Streaming module is the ability to extract inline images from emails—such images become separate documents in Eclipse SE.

Replacing Missing Image or OCR Files

If documents are missing a large number of image files at the page level, Eclipse SE allows you to create images from native files in the case using bulk processing.²⁶

Likewise, if documents are missing OCR at the page level, Eclipse SE allows you to perform OCR (Optical Character Recognition) on the document images. This process creates extracted text files and optionally updates the EXTRACTEDTEXT field to reflect the new text. Word coordinates are also created during bulk OCR processing.

Privileges and Conditions Required

By default, you must have Super or Case Administrator rights to perform ingestion or bulk operations. These requirements may differ if the Super Administrator modifies privileges for a particular user.

To use the SE Streaming module, the following conditions must exist:

- Ipro Eclipse SE 2016.3.2 or later must be installed and you must have a license for both it and the Eclipse SE Streaming module.
- Your site must use remote authorization for both Eclipse SE and the SE Streaming module. See the *Eclipse SE Installation Guide* for details on authorization.
- The Microsoft Windows operating system of the computer on which Eclipse SE Administration is installed (from which you will perform native ingestion) must be 64-bit. See *Eclipse SE System Requirements* for supported Windows versions.



NOTE: For cases that had data imported through a load file prior to any ingestion taking place, users now have the option to use Streaming Ingestion as opposed to being required to use Standard Ingestion method.

26. If only a few images are missing, they can be added using the TIFF-on-the-Fly feature in the Eclipse SE Desktop as explained in Chapter 6 of the *Eclipse SE Desktop User Guide*.

Scheduling

Depending on the size of the database, system capabilities, and other factors, processing tasks may consume significant system resources and time, and may affect Eclipse SE performance.

It is recommended that you carry out major processing during “off hours” to minimize the impact to the system and your users. For example, schedule activities at the end of the work day or on the weekend. Notify users who may work at these times of possible interruptions.

Ingesting Image Files

Overview

If you receive image files without a load file, you can easily ingest them directly into an existing case. The following types of files can be ingested:

- Single- and multi-page .TIF
- Single- and multi-page .PDF
- .JPG
- .PNG
- .GIF
- .BMP

When image files are ingested in this way, the following actions occur:

- New documents, with image keys defined for the ingestion, are added to the case.
- Newly ingested images are associated with the new documents.
- Path information is added for each image.
- Optionally:
 - Images for existing documents are overwritten.
 - Data is added to record original file names and paths of the images.
 - A custodian is added for the new/overwritten records.
- The case is re-indexed.

Preparation

Take the following steps before you begin the native ingestion procedure, based on the tasks you want to perform:

1. Make sure image files are available to the computer on which the ingestion will be performed.
2. Identify (or create) the case into which the images will be ingested.

3. If you want to maintain original file name and path details for the ingested images, make sure that `SINGLE_VALUE` fields are defined for this purpose. The default and Native Ingestion template in Eclipse SE 2016.3.2 and later includes the "Filename" and "Extracted Path" fields for this purpose.²⁷ Create the fields if they don't exist and/or edit field definitions as needed; see "[Step 3: Defining Database Fields](#)" on page 5-12 for details.
4. If you want to define a custodian for the ingested images, make sure that a `CUSTODIAN` field is defined.

Ingestion Procedure

After completing preparation (see above), perform the following steps to ingest image files without a load file:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Processing** menu and click **Ingest Images**.
3. Review the **Ingest Images** workspace and make needed decisions about the options; see the following figure. For example, decide on a numbering scheme for the files and where images will be located after they are ingested.

27. If you will be ingesting both images and native files, and you want to maintain details on original files/locations for both types of files, then you should include fields for image files and fields for native files.



Image Ingestion Definition

4. Select the needed client and case; complete workspace entries as described in the following steps.
5. **Search Location:** Take any of the following steps to select the needed location(s). All files of the types selected in [step 7](#) found in this location will be added to the case.
 - a. If the file location is a mapped drive, select one or more drives.
Or, click to open the folder “tree” and select specific subdirectories or specific files.

- b. If you add a new mapped drive or folder(s) in Windows, click **Refresh Drive List** to display the new mapped drive.
- c. If the file location is not listed, click **Browse** to navigate to and select a network or other location.
- d. To search for image files in all folders in a specific location, select the **Include Subdirectories** option.



TIP: If all drives do not appear, check drive status in Windows Explorer. Windows Explorer may incorrectly show drives as disconnected, even though they are connected and available. Once those drives are opened in Windows Explorer, Eclipse SE will display them correctly in the **Search Locations** list.

6. **Import Type:**

- a. Select the **Multi-** or **Single-Page Images** option. Read the online descriptions of each option to understand how image files will be treated.
- b. For the **Single-Page Images** option, select **Combine images by directory** if you want to combine files in separate folders into single documents.

7. **Image Filters:** Select one or more file types to be ingested.

8. **Images:** Select where you want images to be located *after* they are ingested. The image path will be correctly included in the case.



Also in this area, select the **OCR Images during import option** if you want to create text for the images being ingested. OCR text will be added to the EXTRACTEDTEXT field and the **Quick View** tab.

9. **Numbering:** Select the needed image key (BEGDOC) numbering convention to associate files with case records:

- **Use Filename for BEGDOC:** Each file's name will be added to the case in the BEGDOC field.
- **Suffix Doc Pages:** If you are ingesting multi-page files (such as a multi-page PDF), ensure this option is selected to avoid file naming issues. When this option is selected, the BEGDOC will include a suffix to indicate pages from the multi-page file. For example, ABC-0001.01, ABC-0001.02, and so on. This ensures the pages of the document will not conflict with the pages from any other file.

-
- **Specify the numbering scheme:** Select this option to define your own numbering scheme. In the associated field, enter the first number in the format to be used. The numbers you define will be added to the case in the BEGDOC field. (Files are not renamed.)
 - **TIP:** Eclipse SE “remembers” your entry and increments the last number used by one (1) after an ingestion is completed. This makes it easy to maintain a numbering scheme if you ingest more than one set of images (such as from multiple CDs or other media).
10. **Error Handling:** If the BEGDOC values to be used already exist in the case and image files are already defined for the documents, choose the action Eclipse SE should take when ingesting image files:
 - **Do Not Overwrite:** Ingestion will be skipped for the duplicate BEGDOC values and a message will display at the bottom of the **Ingest Images** page.
 - **Overwrite and Log Error:** Image files for duplicate BEGDOC values will be overwritten and details entered in the log file.
 - **Halt Processing:** Image ingestion will stop and a warning message will display at the bottom of the **Ingest Images** page.
 11. **Metadata Field Mapping** (optional): To maintain details about the original image files for the documents being created or updated, select needed fields:
 - **File Name:** Select a field to contain the original image file name.
 - **File Path:** Select a field that to contain the original file location.See "[Preparation](#)" on page 9-3 for details about these fields.
 12. **Custodian** (optional): To specify a custodian for all images being ingested, take one of the following steps:
 - Select an existing custodian name (if a list exists).
 - Enter the name of an existing custodian (using the same capitalization).
 - Enter a new custodian name. In this case, you will be asked to verify the addition of a new value during the ingestion.The name will be added to the CUSTODIAN field.
 13. Once the job is defined, click **Start**. Wait as images are ingested. (Time will vary depending on the number of files and options selected.)

Status information displays at the bottom of the **Ingest Images** page during the process.
 14. After the job completes, click **View Log File** to check ingestion details.

15. After the job completes, check the results:
 - a. In the **Case Management** tab's navigation panel, expand **Client/Case Management** and click **Case Management**.
 - b. Click the **Database Records** tab.
 - c. Click **List all Records** and navigate to the records created for the newly ingested images.
 - d. Click  next to a document of interest and click a page in the document.
 - e. Click  next to the **Image Path** field to view the newly ingested image. Click **Fit Height** or **Width** in the image viewer as needed to evaluate a file.
 - f. If the image does not display, check the image path. Correct the image path as needed.
 - For one or just a few changes, see ["Checking the Image File Path"](#) on page 11-5.
 - For several images, see ["Managing Files Paths and System Fields"](#) on page 7-26.
 - g. Repeat this procedure as needed to check other newly ingested images.
16. Inform your users that the new images are available in the case and explain proper use of these files in their case review.

Ingesting Native Files

Overview

About native ingestion

If you receive native files without a load file, you can easily ingest them directly into an existing case. All major native file types can be ingested, including Microsoft Outlook® .PST and .OST files. For a list of supported file types, see the *Eclipse SE Native File Reference*.

In addition, native file metadata, such as file properties, can be mapped to a case's fields as needed.

Streaming ingestion

Starting in Eclipse SE 2016.3.2, an optional module is available for faster native ingestion. This module allows sites to ingest large numbers of native files much more quickly than the standard method, reducing processing time.

In addition to faster processing, the SE Streaming module provides you with the ability to perform deduplication and to ingest secure native files using a simple password file.

See "[Privileges and Conditions Required](#)" on page 9-2 for SE Streaming module requirements.

Deduplication

Starting in version 2016.3.2, Eclipse SE also offers deduplication for native ingestion. "De-duping" allows you to eliminate redundant documents from the native file set (and thus your case), at either the custodian or case level.

During ingestion, Eclipse SE evaluates documents and assigns a SHA1_HASH value for each document, based on document analysis and the options you select. Only one instance of files with the same SHA1_HASH value is ingested into the case.

When deduplication is employed, duplicate files are maintained in their original location(s) and Eclipse SE provides reports identifying duplicate files.

Basic ingestion process

When native files are ingested in Eclipse SE (either with the basic function or the SE Streaming module), the following actions occur:

- New records, with image keys defined for ingestion, are added to the case.
- Newly ingested native files are associated with the new case records.
- Files contained in an archive file (such as a .ZIP or .PST file) are extracted and processed.
- Email attachments are extracted and processed.
- Streaming Ingestion only:
 - Inline/inserted files in emails (such as an inserted graphic or a logo in email footers) will be extracted and processed if the associated option is selected.
 - Files embedded in other files (for example, a Word file embedded in an Excel file) are extracted and processed.
- Any native file that is an image format (TIFF, JPG, PDF, etc.), will be included as the image file for the document as well as its native file.



NOTE: Image files created in this way will not have word coordinates for search hit highlighting in the **Image** tab; search highlighting will appear on the **Extracted Text** tab (and **Quick View** tab for text-based native files). If search highlighting is required on the **Image** tab, OCR the files as explained in "[Creating OCR for Multiple Documents \(Bulk OCR\)](#)" on page 9-24.

- If you choose to deduplicate files, then Eclipse SE will evaluate all native files and ingest only one file of each SHA1_HASH value.
- The following fields will be populated:
 - BEGATTACH, ENDATTACH
 - BEGDOC, ENDDOC
 - CUSTODIAN, DUP_CUSTODIAN²⁸
 - EXTRACTEDTEXT
 - NATIVE
 - MD5_HASH, SHA1_HASH
 - Other (depending on metadata in files and mapped fields)
- The case is re-indexed.

28. These fields will be populated if the ingestion definition calls for it.

Preparation

Take the following steps before you begin the native ingestion procedure, based on the tasks you want to perform:

1. Make sure native files are available to the computer on which the ingestion will be performed. For example, if they are in a network location, ensure that the Eclipse SE Administration computer has access to that location.
2. Identify (or create) the case into which the files will be ingested, ensuring that needed fields exist. For new cases, the Native Ingestion Template can be used to help ensure all common fields (including those for email metadata) are included.
3. If you want to specify a custodian for the files being ingested, ensure that a CUSTODIAN field exists. If you will be performing deduplication, ensure that a DUP_CUSTODIAN field exists.
4. If you want to maintain original file name and path details for the ingested files, make sure that SINGLE_VALUE fields are defined for this purpose.

The default and Native Ingestion templates in Eclipse SE 2016.3.2 and later include the "Filename" and "Extracted Path" fields for this purpose. Create the fields if they don't exist and/or edit field definitions as needed; see "[Step 3: Defining Database Fields](#)" on page 5-12 for details.

5. To ingest files into a case created before Eclipse SE version 2016.3.2 and perform deduplication on the new files, ensure that the SHA1_HASH field is added to the case. See "[Validating Paths and Fields](#)" on page 7-27.



NOTE: Deduplication currently functions only for documents added to a case in Eclipse SE 2016.3.2 or later. Documents added to the case prior to this release are not included in the deduplication database and thus will not be compared.

6. If you are using the Eclipse SE Streaming module and some of the native files require a password to be opened, create a simple text file containing the needed passwords, one password per line. Notes:
 - Files for which passwords are not included will not be ingested.
 - Files for which passwords are provided will be ingested, but will not be viewable in the **Quick View** tab. When opening a native file from Eclipse SE (in its native application), the password will be required.

Ingestion Procedure

After completing preparation (see above), perform the following steps to ingest native files without a load file:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Processing** menu and click **Ingest Natives**.
3. Review the **Ingest Natives** workspace and make needed decisions about the options. Review this procedure and see the following figure, which shows the SE Streaming workspace. For example, decide on an approach for mapping metadata and a numbering scheme for the files.




NOTE: The following features/options are available only with the SE Streaming module:

- Extract Inline Images option
 - Deduplication options
 - Password List option
-



Native Ingestion Definition

4. Select the needed client ID and case; complete workspace entries as described in the following steps.
5. **Search Location:** Take any of the following steps to select the needed location(s). All files of the types selected in [step 8](#) found in this location will be added to the case.
 - a. If the file location is a mapped drive, select one or more drives.
Or, click  to open the folder "tree" and select specific subdirectories or specific files.
 - b. If you add a new mapped drive or subdirectory(ies) in Windows, click **Refresh Drive List** to display the new mapped drive, etc.
 - c. If the file location is not listed, click **Browse** to navigate to and select a network or other location.
 - d. To search for native files in all folders in a specific location, select the **Include Subdirectories** option.




TIP: If all drives do not appear, check drive status in Windows Explorer. Windows Explorer may incorrectly show drives as disconnected, even though they are connected and available. Once those drives are opened in Windows Explorer, Eclipse SE will display them correctly in the **Search Locations** list.

6. **Metadata Field Mapping:** Eclipse SE identifies metadata found in the native files (for example, the Author and Title properties of a Microsoft Word document; the To, From, Subject details for emails), and matches it to fields in the case to the extent possible.

The original file name and path details can also be mapped if your case include appropriate fields (see "[Preparation](#)" on page [9-11](#)).

Complete metadata mapping as follows:

- a. Evaluate the mapping that Eclipse SE has completed. If all mapping is correct, skip to [step 7](#).
- b. For each field to be corrected, double-click the field and take one of the following actions in the **Database Field** list:
 - To change a mapped database field, click the correct field.
 - To unmap a field, click **<Not Assigned>** at the top of the list.
 - To create a new field for the metadata, click **<New Field>** at the top of the list and complete the New Field dialog box.²⁹

-
7. **Numbering:** Define the needed image-key numbering scheme for the documents being added to the case. Take one of the following actions:
 - If a **Starting BEGDOC value** is listed and is acceptable, skip to [step 8](#). Eclipse SE “remembers” previous entries and increments the last number used by one (1) after an ingestion is completed. This makes it easy to maintain a numbering scheme if you ingest more than one set of files (such as from multiple CDs or other media).
 - To define a new format and/or numbering set, enter the needed starting BEGDOC value.
 - To use each native file’s name as the BEGDOC value, select the **Use Filename** option. Do *not* select this option if you are ingesting files from any type of archive file (such as a .ZIP or .PST file).
 8. **Extension Filters** (optional): Specify the types of files to be ingested by either or both of the following options:
 - **Manual Entry:**
 - ♦ **Include:** Specify explicit file types to ingest. One example is shown in  this figure. Leave this field blank to include *all* supported file types in the location specified for ingestion. If Eclipse SE finds unsupported file types in that location, an error will be recorded in the ingestion log ([step 18](#)).
 - ♦ **Exclude:** Specify file types to be ignored during the ingestion process. If you know that unsupported files are included in the location specified for ingestion, you can exclude them with this option to avoid error messages.
 - **TIP:** Ensure all needed file extensions are entered. For example, if you want to include .DOC, .DOCM, and .DOCX files, all extensions must be entered.
-
29. After the ingestion is complete, revise the field definition if needed; see ["Changing Field Definitions"](#) on page 6-9. Or, evaluate the native file metadata; if any database fields are missing, stop the native ingestion, add new fields in **Case Management** with needed flags/options, then return to the native ingestion process.

- **File Type Select:** Click (Use Stellent ID) next to either the **Ext. to Include** or **Ext. to Exclude** fields. This will open the Select File Type dialogue box, which displays a list of all file types that can be ingested in your case. You may also click the (Plus) icon in order to see all of the extensions associated with a particular file type. From here, mark the checkbox next to the item(s) you want to either ingest or exclude from your case. Once you have made your selection(s), click **Done**.

9. **Native File Options:**

- **Copy files to case directory** or **Keep original location:** Select where native files should be located *after* they are ingested. The native file path will be correctly included in the case.
- **Extract inline images** (optional): If you are using the SE Streaming module, for email files only, select this option to extract images or embedded objects in emails as separate documents. For example, if the body of an email includes an inserted image and two images in the footer, all three images will become separate documents in Eclipse SE. Documents created in this way are considered attachments to the original email.

10. **Extracted File Options:**

- a. Select where you want attached/embedded files to be located *after* the native files are ingested and these files are extracted. For example, if an email message has an attachment, the email message will go in the Native File location and the attachment file will be in the Extracted File location.
- b.



11. **Email Hash Options** (optional):

- a. Select the details to be factored into the calculation of SHA1_HASH values for emails (see the following figure). For example, if only **Include Subject** is selected, then *only* the email Subject field will be used to calculate the SHA1_HASH value.



- b. Depending on the options selected in step 11.a., select from the following options.

Option	Description
Alternate Email Date	If the Include Sent Date option is selected, select either Creation Date or Last Modified date to be used in the hash analysis for emails for which no sent date exists (such as draft messages).
Email Body Whitespace	If the Include Body option is selected, choose to Retain (include) or Remove white space between lines of text in the hash analysis.
Use Start/End Times	If the Include Sent Date option is selected, select this option to use a calendar item's start or end date in the hash analysis for calendar items for which no sent date exists (such as draft appointments). If this option is not selected, then the last modified/created date is used.

12. **Custodian** (optional): To specify a custodian for all documents being ingested, take one of the following steps:
- Select an existing custodian name (if a list exists).
 - Enter the name of an existing custodian (using the same capitalization).
 - Enter a new custodian name. In this case, you will be asked to verify the addition of a new value during the ingestion.

The name will be added to the CUSTODIAN field for all documents, except as noted for deduplication (next step).

13. **DeDup** (optional): If you are using the SE Streaming module, to ensure that duplicate documents are not ingested into the case, complete the following step³⁰:
 - a. Select **Perform DeDuplication**.
 - b. If you selected a custodian in [step 12](#), select the type of analysis to be performed:
 - ♦ **Case Level**: The files being ingested will be compared to all documents in the case.
 - ♦ **Custodian Level**: The files being ingested will be compared only to files for which the custodian is the same as the custodian specified in [step 12](#).
 - c. If a custodian was specified in [step 12](#), select or clear the **Make selected custodian primary** option:
 - ♦ Option selected: For any document being ingested that is a duplicate of one in the case, if a custodian is defined for the *original* document, the “ingestion custodian” will be added to the CUSTODIAN field (and will replace the existing custodian). The existing custodian will be added to the DUP_CUSTODIAN field.
 - ♦ Option Not selected: If you do not select this option, for any document being ingested that is a duplicate of one in the case, if a custodian is defined for the *original* document, the ingestion custodian will be added to the document’s DUP_CUSTODIAN field.
14. **Password List** (optional): If you are using the SE Streaming module, some of the files being ingested are password-protected, and you want them to be ingested:
 - a. Identify or create a plain text “password” file (such as .TXT or .CSV) that includes all needed passwords, one per line.
 - b. In the **Password List** field, enter the complete path and filename for the password file, or click **Browse** and navigate to/select the file.

30. A SHA1_HASH field is required for deduplication, and a DUP_CUSTODIAN field must exist if you want to define a primary custodian.



NOTES: When problems exist with password-protected files (you do not have a password file, some passwords are missing or incorrect, or if you are not using the SE Streaming module):

- Although the files are not ingested, records are added for the password-protected files and the following fields are populated^a: BegDoc, Filename, Extracted Path, MD5_Hash, and SHA1_Hash. The DocumentType field includes "EXTRACTION ERROR."
- The error log lists files that are not ingested because they are password protected.
- If there are any password protected documents in your case that are not covered in your password list, a new "Reprocess" option will be available. After you add the proper password to your list, click the "Reprocess" button and select the error log file with the errored documents you wish to ingest into your case.

- a If they are included in your case. These are the default field names in the Native Ingestion template.

15. Once the job is defined, click **Start**.



NOTES:

- If all streaming ingestion licenses are in use, a message will ask if you would like to submit the next available job using the standard SE Ingestion Engine. Click **Yes** to proceed.
- If the Standard Eclipse SE Ingestion engine was used on the first job of a case, then all other jobs in that case will be processed the same way.
- If the Streaming Ingestion Module was used on the first job of a case, then all other jobs in that case will be processed the same way.

Wait as the job is processed. Status displays at the bottom of the workspace (Time will vary depending on the number and types of files and options selected.)

16. When the ingestion is complete, information will be located as follows:
- The number of documents ingested will be noted at the bottom of the **Ingest Natives** workspace, as shown in the following figure.
 - If errors occur, a message will display. Read the message and click **OK**.

- If deduplication was performed and duplicate documents were found, a message will display. Note the path in the message and click **OK**.



Native Ingestion Count

17. Continue with the following steps as needed.
18. To view details about the ingestion, click **View Log File**. A separate log file is generated for each ingestion session; clicking **View Log File** opens the current log. Files are named "NativeImportLog" with a date/time indicator and they are located in the "Native Ingestion Logs" folder in the case data directory.
19. If deduplication was performed and duplicates were identified, two reports (.CSV files) are added to the "DeDup Logs" folder in the case data directory. Files are named with the ingestion date and time (for example, 2016-08-19_1505.csv).
One file provides details on all ingested files and duplicates found; the other is a summary report indicating number of duplicate files by type.
20. Check the ingested files in Eclipse SE Desktop document details tabs (**Quick View**, **Extracted Text**, etc.), or in Eclipse SE Administration as follows:
 - a. In the **Case Management** tab's navigation panel, expand **Client/Case Management** and click **Case Management**.
 - b. Select the needed client and case.
 - c. Click the **Database Records** tab.
 - d. Click **List all Records** and navigate to the records created for the newly ingested native files.
 - e. Click a document (if the page count is zero), or click next to a document (page count >0) of interest and click a page in the document.

-
- f. Ensure that the **Native File** field includes the correct file name and a size; the **Extracted Text** field may also contain details (depending on file type). The following figure shows an example.



Checking Newly Ingested Files



NOTES:

- An **Image File** should be included for native files that are image formats (TIFF, JPG, PDF, etc.), but for other files, the page count will be zero (until/unless images are ingested/created using bulk TIFF).
 - Also review field data. Click the **Field Name** or **Field Value** column heading to sort the column. Also, the column width(s) can be increased by dragging the heading boundary to the desired size.
-
- g. If the native file path is wrong, correct it as explained in "[Managing Files Paths and System Fields](#)" on page 7-26.
- h. Repeat this procedure as needed to check other newly ingested native files.
21. Inform your users that the new native files are available in the case and explain proper use of these files in their case review.

Creating Multiple Document Images (Bulk TIFF)

Eclipse SE data is Administration allows you to create .TIF files (or .PNG for color) for document pages lacking images. The images will be created from native files. The result will be to add images to the case (the **Image** tab in the Eclipse SE Desktop) and to update the IMAGECNT field to reflect the correct number of pages for the document.



NOTES: Before performing bulk TIFF operations, note the following:

- Documents lacking native files are skipped during the Bulk TIFF process.
- If an image file already exists for a document, it will not be overwritten. However, if an image needs to be corrected, TIFF-on-the-Fly function in the Eclipse SE Desktop **Image** tab may be available. See the *Eclipse SE User Guide* for details.
- Multi-page images will be numbered with the image key (BEGDOC) for page 1, and for page 2 and following, a suffix indicating the page number. For example, for image key ABC-0001, the image keys will be ABC-0001, ABC-0001.0002, ABC-0001.0003, and so on.
- When bulk TIFF is used to create images, ENDDOC and ENDATTACH values are identified by Eclipse SE and added to the fields automatically.
- If you have a large natives-only case and have Ipro eCapture in addition to Eclipse SE, use the procedure explained in [Appendix D](#) to create images for your case.


To create TIFF files for pages lacking images:

1. Getting started:
 - a. Identify which documents need images, either an entire case or documents matching particular search criteria. If a search will be used, identify the needed search criteria or saved search.



TIP: If the documents are diverse from a search standpoint, one approach is to place them all in a private folder and then search for documents in the folder.

- b. Review the discussion of "[Scheduling](#)" on page [9-3](#) and select an appropriate time to create images.
 - c. If users might be logged on, alert them that performance may be affected while you perform this bulk operation.
2. In Eclipse SE Administration, click the **Case Management** tab.

3. In the navigation panel, expand the **Processing** menu and click **TIFF**.
4. When the (bulk) TIFF workspace appears, select the needed client and case.
5. Select the scope of the operation:
 - **Process Entire Case**: TIFF files will be created for all missing images.
 - **Saved Search**: Select this option and then select the needed saved search.
 - **Advanced Search**: Select this option and then click **Search**. Define and run the needed search. For details on searching, see the *Ipro Eclipse SE Search Reference*. The **Doc Count** field will display the number of documents resulting from the search.
6. Optional: To include or exclude specific types of files:
 - a. Select the needed option, **Process only the following extensions** and/or **Exclude the following extensions**.
 - b. In the appropriate field, enter the extensions of file types to be included or excluded, separated by a comma. In this example, spreadsheet and related file types will be excluded from the TIFF operation. 
7. Select **Create COLOR Images** if needed. When this option is selected, .PNG files are created for color images.
8. When all options are selected, click **Start**. TIFF (or .PNG) files will be created and placed in case's defined image-file location.
9. Observe status at the bottom of the workspace. The amount of time the operation will take depends on how many images are being processed, whether or not color has been selected, and your system resources.
10. When the operation completes, note important information in the status bar. If errors exist, click **View Log File** to evaluate the error log.
11. After creating image files, the typical next step is to add corresponding OCR for the new images as explained in "[Creating OCR for Multiple Documents \(Bulk OCR\)](#)," next.

12. To check images, view them on the **Images** tab in Eclipse SE Desktop (preferred), or as follows in Eclipse SE Administration:
 - a. In the **Case Management** tab's navigation panel, expand **Client/Case Management** and click **Case Management**.
 - b. Select the needed client and case.
 - c. Click the **Database Records** tab.
 - d. Click **List all Records** and navigate to the records created for the newly ingested native files.
 - e. Click next to a document of interest and click a page in the document.
 - f. Click next to the **Image File** field and check the image.
 - g. Repeat to view other new images.

Creating OCR for Multiple Documents (Bulk OCR)

OCR (optical character recognition) refers to the process of creating machine-readable text from the printed text in image files. The text extracted from documents in this way can then be indexed for search purposes.

Eclipse SE Administration allows you to create OCR (including word coordinates for existing images) for document pages for which it is missing, using English or other language dictionaries. Results include:

- OCR content is added to the **Extracted Text** tab in the Eclipse SE Desktop.
- It is also added to the case's EXTRACTEDTEXT field.
- Word coordinates are created for images to allow search highlighting.



NOTES: Before performing bulk OCR operations, note the following:

- Documents lacking image files are skipped during the bulk OCR process. Documents containing no readable text are also skipped (for example, a photo file).
- If OCR already exists for a document, it will not be overwritten.

In this topic, "OCR" or "extracted text" refers to the content in the **Extracted Text** tab or field, as well as word coordinates.
- If your case includes documents of different languages, identify the languages to be used. Also note that one language at a time can be processed.

To create OCR:


1. Getting started:
 - a. Identify which documents need OCR, either an entire case or documents matching particular search criteria. If a search will be used, identify the needed search criteria or saved search.



TIP: If the documents are diverse from a search standpoint, one approach is to place them all in a private folder and then search for documents in the folder.

- b. Review the discussion of "[Scheduling](#)" on page [9-3](#) and select an appropriate time to add OCR.
 - c. If users might be logged on, alert them that performance may be affected while you perform this bulk operation.
2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand the **Processing** menu and click **OCR**.
4. When the (bulk) OCR workspace appears, select the needed client and case.
5. Select the scope of the operation:
 - **Process Entire Case:** OCR will be created for all images for which it is missing.
 - **Saved Search:** Select this option and then select the needed saved search.
 - **Advanced Search:** Select this option, click **Search**, then define and run the needed search. For details on searching, see the *Ipro Eclipse SE Search Reference*. The **Doc Count** field will display the number of documents in the search results.
6. If a language(s) other than English exists in the images selected in [step 5](#), complete the following steps to ensure the correct language dictionary is used for this OCR session:
 - a. Click **Select OCR Languages**.
 - b. Select the needed language. Note that one language at a time can be selected.
 - c. Click **OK**.
7. Select needed options; see the following table.

Bulk OCR Options

Option	Description
Include Image Key in OCR Text	<p>Select this option to add the document's image key at the beginning of the extracted text, in the Extracted Text field and tab. The following figure shows the tab.</p> 
RE-OCR Pages Rotated since last Bulk OCR	<p>Some pages may have been initially scanned with the wrong rotation, yielding meaningless OCR. If the images for these pages are rotated correctly in Eclipse SE Desktop, select this option to re-OCR the pages based on the Desktop rotation.</p>
RE-OCR All Documents/Pages	<p>Select this option to create OCR for all pages of all documents selected in step 5; existing OCR will be overwritten in the Extracted Text field and tab.</p>
Do Not Replace Existing Extracted Text	<p>Select this option to create word-coordinate files without updating any existing extracted text.</p>
Image Rotation	<p>Choose one of the rotation options:</p> <ul style="list-style-type: none"> • User Viewer Rotation: If pages are rotated correctly in Eclipse SE Desktop, select this option to OCR the pages based on the Desktop rotation. This is the preferred selection. • Auto-Rotate Images: If this option is selected, Eclipse SE analyzes a sample of image text to identify the correct rotation. This option may not work for certain images, such as those with text in the document margins.

-
8. When all options are selected, click **Start**. OCR text will be placed in the case database directory.
 9. Observe status at the bottom of the workspace. The amount of time the operation will take depends on how many images are being processed.
 10. When the operation completes, note important information in the status bar. If errors exist, click **View Log File** to evaluate the error log.

10 Importing and Managing Transcripts

In this Chapter

Overview	10-1
About Transcripts	10-1
Privileges Required	10-2
Transcripts in the Desktop	10-2
Before you Begin	10-2
Importing Transcript Files	10-5
Exporting Transcript Files	10-7
Managing Transcripts	10-8
Getting Started	10-8
Modifying Transcript Details	10-9
Working with Transcript Types.....	10-9
Working with Transcript Issues.....	10-13
Managing Exhibit Paths	10-15
Checking Transcript Properties	10-17
Deleting Transcripts	10-17

Overview

About Transcripts

Ipro Eclipse SE allows you to include transcripts with cases for review in Eclipse SE Desktop. In addition to including transcripts, Eclipse SE provides options for managing transcripts and identifying transcript issues.

The following transcript file types can be imported into Eclipse SE Administration or Desktop:

- .PCF and PTF (LiveNote)
- .TRN (Summation)
- .TXT (standard ASCII)
- .XML (generic XML)



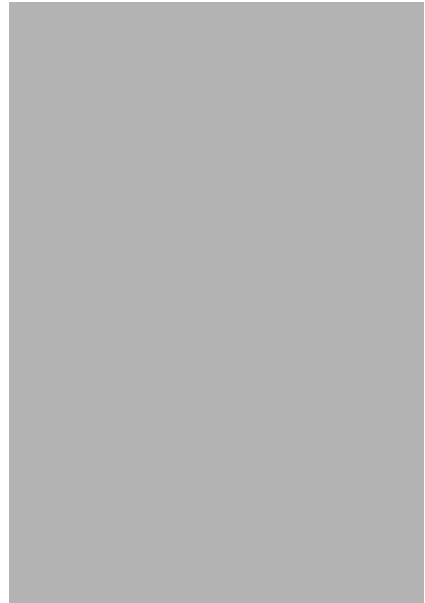
NOTE: .XML and .TXT transcript files have specific requirements; see "Before you Begin" on page 10-2.

Privileges Required

Super Administrators and Case Administrators assigned to a case can import and manage transcripts in Eclipse SE Administration or the Eclipse SE Desktop. Non-administrative users with the Import Transcripts privilege can import transcripts in Eclipse SE Desktop.

Transcripts in the Desktop

The figure on the right shows transcripts listed in Eclipse SE Desktop. Double-clicking a transcript in this list opens the transcript in the documents pane.



Before you Begin

The following actions will help you import and manage transcripts efficiently:

- For a specific case, identify the transcript files to be imported.
- Determine whether the transcripts include annotations (issues, notes, highlights) and whether you want to include those annotations in the import.
- If transcript exhibits will be imported, decide where they should reside in your file system.
- Consider a consistent naming and organizational (grouping) approach for transcripts so that users can efficiently find needed transcripts and transcript content.
- Likewise, give some thought to the naming and color scheme for transcript issues.
- .TXT or .XML files: See the following paragraphs.

.TXT file requirements


For successful import of .TXT transcript files, ensure that the files meet the requirements shown in the following figure and listed in the following table.



Guidelines for Text Transcript Files

Item	Requirement
File size	<1 MB
Headers and footers	<ul style="list-style-type: none">• Do not include headers, unless they include only page numbers.• Do not include footers.
Lines	<ul style="list-style-type: none">• Line numbers:<ul style="list-style-type: none">- All lines are numbered.- Line numbers must be in columns 2 and 3.• Line length: ≤78 characters (including spaces)

Guidelines for Text Transcript Files (Continued)

Item	Requirement
Question numbers	<p>If questions are numbered, question numbers must be in columns 5, 6, and/or 7 as shown in the following figure:</p> 
Page breaks	<ul style="list-style-type: none"> • Preferred: No page breaks. • If used, page breaks must be on the line prior to the page number. • If page breaks are <i>not</i> used, include a consistent number of lines per page.
Page numbers	<ul style="list-style-type: none"> • All transcript pages must be numbered. • Page numbers must be <ul style="list-style-type: none"> - aligned to the left margin. The first digit of the page number must be in column 1 (see the following figure); - at the top of each page; - at least four digits long. Use leading zeros if needed, such as 0012 for page 12. • The starting page number of the volume must be the very first line of the transcript (title page line 1). If the volume starts on page 10, then 0010 (or 00010) would be the first line of the transcript.
Text	<ul style="list-style-type: none"> • Text must begin at least one space after the line number. • Recommended: Start text in column 7.

.XML file requirements

If you will be importing .XML files, ensure that each .XML file and its .DTD "binder" file are present in the same folder.


Optional: Complete the following steps to verify that you have the correct .DTD file(s):



1. Open the .XML file in a text editor such as Notepad.
2. Locate the .DTD file name; it will be in a statement similar to the following. In this example, the .DTD filename is shown in bold.

```
<!DOCTYPE BinderTranscriptInfo SYSTEM "bndr2001_02_12.dtd">
```
3. Close the .XML file and ensure that the .DTD file identified in step b is in the same folder as the .XML file.
4. Repeat for other .XML files to be imported.

Importing Transcript Files

To import transcript files:

1. Complete [step 2](#) or [step 3](#), depending on your starting point:
2. To import transcripts in **Eclipse SE Administration**:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Client/Case Management** menu and click **Case Management**.
 - c. In the Case Management workspace, select the needed client and case. If the case is currently inactive, select the **Show Inactive Cases** option and make the case active.
 - d. Click the **Transcripts** tab. (If it is not visible, click  on the right side of the workspace tabs.)
 - e. Skip to [step 4](#).

3. To import transcripts in **Eclipse SE Desktop**:
 - a. Open the needed case or batch in Eclipse SE Desktop. (Transcripts are imported into the case, even if you open a batch.)
 - b. From the Eclipse SE button menu, select **Import Transcripts**. The Import Transcripts dialog box opens.
4. On the right side of the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), click  and navigate to the transcript file location.
5. Select a needed file and click **Open**.
6. To select more transcript files, click **Add** and repeat the previous step.
 **NOTE:** Select transcripts for which the import option ([step 7](#)) should be the same. To select multiple files, click one, then Shift+click or Ctrl+click additional files.
7. Except for .TXT files, choose the way in which annotations in the transcript file(s) will be handled from the **Select Import Option** list:
 - **Create New Issues:** Import all issues, highlights, and notes defined in the transcript file(s). Create new issues in Eclipse SE if they are not already defined.
 - **Import Existing Issues Only:** Import issues only if they are already defined in Eclipse SE. Import highlights and notes also.
 - **Ignore All Issues:** Do not import any issues; import only highlights and notes.
 - **Ignore All Annotations:** Do not import any issues, highlights, or notes.
8. When all transcripts are selected, click **Import Transcripts**.
9. When the import is complete, review details of the action. If errors exist, click **View Log File** for additional information.



NOTE: An error message similar to the following will appear if you try to import the same transcript more than once: "ERROR: Non-unique file name value. This transcript has already been imported." If you need to re-import/replace a transcript that has already been imported into Eclipse SE, first delete it in Eclipse SE (see page [10-17](#)), and then import the transcript again.

Eclipse SE imports transcript field content as follows:


- The transcript's witness name is added to the Eclipse SE **Name** field. If the transcript does not include a witness name, then the file name is included in the **Name** field.
- The transcript's description is added to the Eclipse SE **Description** field. If the transcript does not include a description, then the transcript name is included in the Eclipse SE **Description** field.

10. Continue with needed procedures in "[Managing Transcripts](#)" on page 10-8.

Exporting Transcript Files

Transcripts can be easily exported from Eclipse SE to .PTF files; any annotations that have been applied will be included.

To export transcripts:

1. Complete [step 2](#) or [step 3](#), depending on your starting point:
2. To export transcripts from **Eclipse SE Administration**:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Client/Case Management** menu and click **Case Management**.
 - c. In the Case Management workspace, select the needed client and case. If the case is currently inactive, select the **Show Inactive Cases** option and make the case active.
 - d. Click the **Transcripts** tab. (If it is not visible, click  on the right side of the workspace tabs.)
 - e. Skip to [step 4](#).
3. To export transcripts from **Eclipse SE Desktop**:
 - a. Log in to Eclipse SE Desktop and open the needed case or batch.
 - b. From the Eclipse SE button menu, select **Import Transcripts**. The Import Transcripts dialog box opens.
4. In the **Transcript** list, right-click the transcript to be exported and select **Export Transcript**.
5. Navigate to an appropriate folder, enter a name for the transcript file, and click **Save**.
6. Repeat these steps to export other transcripts.


Managing Transcripts

Getting Started

This section explains how to properly organize and maintain transcripts that have been imported into a case. For the procedures in this section, it is assumed you have completed one of the following procedures.

Eclipse SE Administration

To manage transcripts in Eclipse SE Administration:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Client/Case Management** menu and click **Case Management**.
3. In the Case Management workspace, select the needed client and case. If the case is currently inactive, select the **Show Inactive Cases** option and make the case active.
4. Click the **Transcripts** tab. (If it is not visible, click  on the right side of the workspace tabs.)
5. Continue with the procedures in this section.

Eclipse SE Desktop

To manage transcripts in Eclipse SE Desktop:

1. Log in to Eclipse SE Desktop and open the needed case or batch.
2. From the Eclipse SE button menu, select **Import Transcripts**. The Import Transcripts dialog box opens.
3. Continue with the procedures in this section.

Modifying Transcript Details

If needed for consistency or clarity, change transcript names, descriptions, and/or dates as follows:

1. In the **Transcript** tab's (Import Transcripts dialog box in Eclipse SE Desktop) **Transcript** list, right-click the transcript to be modified and select **Edit Transcript**.
2. In the Edit Transcript dialog box, change transcript details as needed (name, description, and/or date/time).
3. When finished, click **OK**.



TIPS:

- Transcript files may have the same name and description. In these cases, use transcript types to efficiently organize such files.
- Enter dates in the format **mm/dd/yyyy**.
- To change the time, click each time component (hour, minutes, seconds, AM-PM designator) and enter the needed values. Enter values based on a 12-hour clock; they will display in the **Transcript** list in 24-hour format.

Working with Transcript Types

About transcript types

Transcript types allow you to group transcripts in a folder structure to make it easy for administrators (in Eclipse SE Administration) and reviewers (in Eclipse SE Desktop) to find and search transcripts. Up to ten levels of transcript type are possible, similar to folders containing subordinate folders.

The following figure shows transcript type names in the **Case Folders** pane in Eclipse SE Desktop.



Transcript Type Details in Case Folders Pane

Create new transcript types

To create new transcript types:

1. In the **Transcript** list on the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), review transcripts and types to determine how to organize the transcripts.
2. Right-click in the Transcript list area (not on a specific transcript) and select **Add Transcript Type(s)**.
3. Add transcript type names, one per line. When finished, click **OK**.
4. To create subtypes for a particular transcript type or subtype:
 - a. Right-click the type name and select **Add Transcript Type**. Each transcript type can have up to nine levels of subtype (ten levels including the main type). This example shows subtypes under the main type "Rulings" and under "Jones."
 - b. When all subtypes are entered, click **OK**.
 - c. Repeat these steps to add other subtypes for other transcript types or subtypes.



Assign transcripts to a type or subtype

To assign a transcript type to one or more transcripts:

1. If needed, create needed types as described in the previous procedure.
2. Complete [step 3](#) or [step 4](#), per your preference.
3. Selecting transcripts:
 - a. Select one or more transcripts in the **Transcript** list. For multiple transcripts, click one transcript and Shift-click or Ctrl+click additional transcripts to select a contiguous or non-contiguous set, respectively.
 - b. Right-click and select **Move to Type**, then the needed type.
4. Selecting a transcript type:
 - a. Right-click the needed type (or subtype) and select **Move Transcripts To This Type**.
 - b. In the Select Transcripts dialog box, select the transcripts to move.
 - c. When finished, click **OK**.



TIP: Click either column heading in the Select Transcripts dialog box to sort the column and more quickly find needed transcripts.

Edit transcript type name

To change a transcript type (or subtype) name:

1. In the **Transcript** list on the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), right-click the type (or subtype) to be changed and select **Rename Transcript Type**.
2. Change the type name and click **OK**.



Delete transcript type


To delete a transcript type (or subtype):

1. Review the **Transcript** list on the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop).
2. If transcripts are assigned to the type, move them to another type as described in ["Assign transcripts to a type or subtype"](#) on page 10-11. Otherwise, they will be moved to the (no transcript type) group.
3. Right-click a type (or subtype) to be deleted and select **Delete Transcript Type**.
4. In response to the confirmation message, click **Yes**.

Perform multiple transcript-type actions

To manage all transcript types at one time:

1. In the **Transcript** list on the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), review the list to determine needed actions.
2. Right-click in the blank portion of the list area and select **Manage Transcript Types**.
3. Complete the following steps as needed in the Manage Transcript Types dialog box.
4. To add a new transcript type:
 - a. Click  and enter names for the new types (one name per line).
 - b. When finished, click **OK**.
 - c. Add transcripts to the new type as described in ["Assign transcripts to a type or subtype"](#) on page 10-11.
5. To change transcript type names:
 - a. Click  for a name to be changed.
 - b. Edit the name and click **OK**.
 - c. Repeat for other names to be edited.

6. To delete transcript types:
 - a. If transcripts are assigned to a type being deleted, move them to the needed type as described in "[Assign transcripts to a type or subtype](#)" on page 10-11. (Otherwise, the transcripts will be moved to the "no transcript type" group.)
 - b. To delete transcript types in the Manage Transcript Types dialog box, click  for the name to be deleted.
 - c. Repeat for other types to be deleted.
7. When finished with all actions, click **OK**.

Working with Transcript Issues

About transcript issues



Transcript issues provide a "tagging" mechanism that can help with transcript-related activities, such as cross-examination preparation or handling objections. Reviewers apply issues to transcripts in Eclipse SE. Ipro Eclipse SE provides an easy method for importing, creating, and managing issues.



NOTES: Document tags may be added as transcript issues. See the "Also Create Transcript Issue" option on page 5-25 for details. Also, new issues can be created from the **Transcript Annotations** tab in Eclipse SE Desktop (for users with appropriate privileges).

Create new issues



To create new issues in Eclipse SE Administration:

1. In the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), click **Modify Issue Palette**.
2. Click .
3. In the Create Issue dialog box, enter an issue name and click  to select an issue color.

4. In the Color dialog box, select a color and click **OK**. Alternatively, define a custom color:
 - a. Click **Define Custom Colors** in the Color dialog box.
 - b. Click the needed color on the color palette or enter an HSL or RGB color code.
 - c. When the color is created, click **Add to Custom Colors** and then **OK**.
5. As needed, perform other actions in the Modify Issue Palette dialog box (see the following procedures).
6. When finished, click **OK**. New issues are added to the bottom of the **Issue** list in the Modify Issue Palette dialog box.

Modify an issue definition

After creating issues (page 10-13), change an issue's name and/or color as follows:


1. In the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), click **Modify Issue Palette**.
2. In the **Issue** list, click the issue to be changed.
3. Click .
4. As needed, change the name.
5. As needed, change the color. To do so, click , select a color, and click **OK**. Alternatively, define a custom color:
 - a. Click **Define Custom Colors** in the Color dialog box.
 - b. Click the needed color on the color palette or enter an HSL or RGB color code.
 - c. When the color is created, click **Add to Custom Colors** and then **OK**.
6. As needed, perform other actions in the Modify Issue Palette dialog box.
7. When finished, click **OK**.

Delete an issue



NOTE: Issues that are in use cannot be deleted. For unused issues, be certain of your choice in the following procedure, as the issue is instantaneously deleted.


After creating issues (page 10-13), delete unused issues as follows:

1. In the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), click **Modify Issue Palette**.
2. In the **Issue** list, select one or more unused issues to be deleted. For multiple issues, Shift+click or Ctrl+click a contiguous or non-contiguous set, respectively.
3. Click .
4. As needed, perform other actions in the Modify Issue Palette dialog box.
5. When finished, click **OK**.


Managing Exhibit Paths

After importing transcripts (page 10-5), review the **Transcript** list in the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop).

Transcripts with exhibit files will be indicated by a paperclip in the right column of the **Transcripts** list (see the following figure). Check and correct the path(s) defined for exhibit files as follows:

1. If needed, copy exhibit files from their source location to an appropriate network location, such as a folder in the case system directory.
2. For a transcript with exhibits, click  next to the transcript name to see the list of linked exhibits as shown in this figure.




 **TIP:** To see a complete path in the **Transcript** list, point to the path in question to display a tooltip showing the full path and file name.

3. If the path listed is not correct or you are not sure, right-click the transcript name (not the exhibit file) and select **Manage Transcript Path**. The Manage Transcript Exhibit Paths dialog box opens.
4. Optional: Take one or both of the following actions as needed:
 - To display only one type of transcript in the dialog box, select it from the **Transcript Type** list.
 - Select or clear the **Show only transcripts with exhibits** option.
5. For all of the transcripts listed in the dialog box, click **Find bad links** to identify incorrect paths for exhibit files. Incorrect paths display in **red**.
6. To correct path problems:
 - a. Click an incorrect path. It will be added to the **Old Path** field.
 - b. Delete the file name from the **Old Path** field so that just the path is listed.
 - c. In the **Replace** field, enter or copy the portion of the path that is wrong.
 - d. In the **With** field, enter the correct path information. Use a UNC path and make sure the path ends with a backslash. The following figure shows an example:



Path Correction Example

- e. Click  to display the complete, corrected path in the **New Path** field. If problems exist, repeat previous steps to define the correct path.
- f. When the **New Path** is correct, select one of the following options to define the scope of your changes:
 - **Update paths for this transcript** - the transcript selected in [step 2](#).
 - **Update paths for all transcripts** - all transcripts listed in the dialog box.
- g. Click **Go**. The exhibit path will be corrected.

7. Repeat this procedure to correct other incorrect paths.
8. When finished, click **Close Window**.

Checking Transcript Properties

To review transcript details:

1. In the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), right-click a transcript of interest and select **Properties**. Details include:
 - Transcript identification (date, description, comment)
 - Number of text lines
 - Number of question-answer (QA) pairs
 - Number of annotations
 - Date of import into Eclipse SE
2. When finished, click **OK**.

Deleting Transcripts

After importing transcripts into a case (page [10-5](#)), delete unneeded transcripts as follows:

1. In the **Transcripts** tab (Import Transcripts dialog box in Eclipse SE Desktop), complete [step 2](#) or [step 3](#) as needed.
2. To delete one transcript, right-click it, select **Delete Transcript(s)**, and skip to [step 4](#).
3. To delete multiple transcripts:
 - a. Click one transcript, then Shift+click or Ctrl+click other transcripts.
 - b. When all transcripts are selected, right-click and select **Delete Transcript(s)**.
4. In response to the warning message, click **OK**.

11 Evaluating Case Records in Eclipse SE Administration

In This Chapter

Overview	11-1
Getting Started	11-2
Evaluating and Changing Records	11-3
Reviewing the Documents List	11-3
Reviewing Document Details	11-3
Checking the Image File Path	11-5
Reviewing Import Job History	11-6
Deleting Pages or Documents	11-7

Overview

As part of the following case activities, you have the ability to view case record details and make certain record changes in Eclipse SE Administration:

- After importing case data
- After migrating a case
- As part of case management

Regardless of the specific activity, the record evaluation and tasks are the same, as explained in this chapter.

Getting Started


To evaluate records as part of your Eclipse SE Administration activities, complete the following procedure:

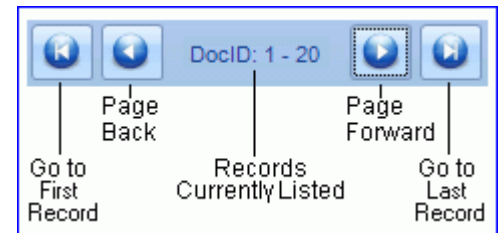
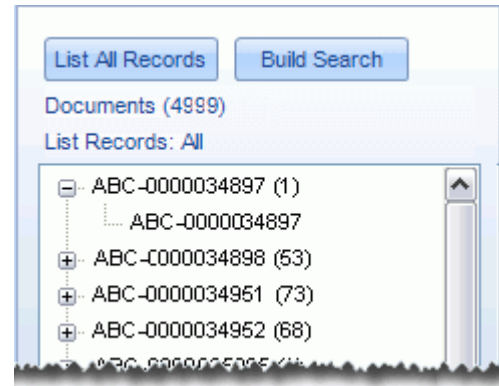
1. In Eclipse SE Administration, complete one of the following procedures:
 - Import case data as explained in [Chapter 8](#).
 - Migrate a case as explained in "[Migrating Cases from LexisNexis Concordance](#)" on page [5-39](#) or "[Migrating Cases from AD Summation](#)" on page [5-52](#).
 - Manage a case as explained in "[Managing Eclipse SE Cases](#)" on page [6-1](#).
2. If you are importing case data, complete the following after you have imported the case:
 - a. In the Import Data workspace, click the **Step 4. Verify** tab.
 - b. Skip to [step 5](#).
3. If you are migrating a case, complete the following after you have migrated the case:
 - a. In the migration workspace, click the **Step 4. Verify** tab.
 - b. Skip to [step 5](#).
4. If you are managing an existing case:
 - a. In the Case Management workspace, select the needed client and case.
 - b. Click the **Database Records** tab.
 - c. Go to the next step.
5. Click **List All Records**. Or, list selected records based on a search by clicking **Build Search**. For details on searching, see the *Ipro Eclipse SE Search Reference*.
6. Continue with the procedures in this chapter.

Evaluating and Changing Records

Reviewing the Documents List

After completing "Getting Started" on page 11-2 complete any of the following actions in the **Documents** list (shown in the adjacent figure):


- Check the total number of documents at the top of the pane (in parentheses).
- The listing is a tree view with documents at the top level. Click  to see pages associated with particular documents.
- Click a document or page to see associated details to the right of the **Documents** list; see the next topic.
- To go to a specific image key or document ID:
 - Right-click in the list, select the appropriate **Go to** command.
 - Select or enter the desired image or document identification (ID).
 - Click **OK**. The document or document containing a selected page will be moved into the visible record list and highlighted. If the exact ID does not exist, the closest ID will be highlighted.
- Navigate in the **Documents** list using the buttons at the bottom of the pane (shown here).



Reviewing Document Details

After completing "Getting Started" on page 11-2, select a specific page of interest in the **Documents** list. Details for a selected page are presented in the center and right side of the workspace. Note:

- If details in a field(s) in the center part of the workspace extend beyond the size of the field, click in the field and use the right arrow key to see the "hidden" content.
- If content in the **Field-Data** list extends beyond the size of the field, change column widths (to some extent) by dragging column separators.

- If needed, in the **Field-Data** list, click, then right-click a row and select **Copy Record** or **Copy Field**. The data can be pasted into any file for evaluation.
- Click  next to the **Image Path** and/or **Page OCR** field to view the image file and/or extracted text associated with a particular page. Click **Fit Height** or **Width** in the image viewer as needed to evaluate a file.

Regarding content in this area of the tab:

- **Doc Id** and **Image Key** are the given details for the selected record.
- **Document-Level** and **Page-Level** content is information about the selected document or page that has either been imported or has been added by a reviewer in Eclipse SE Desktop. For example:
 - **Doc Tags** are the tags that have been applied to a document.

Doc Tags: Confidential

- **Annotations** lists the types of annotations added to a document (or page).

Annotations: Highlights, EmbeddedText, Markup

- **Redactions** lists the redactions added to a document (or page).

Redactions: Spousal Privilege

- **Word Hits:** For cases based on .LFP, .DLF, or EDRM (XML) import files, if the import file included word coordinates³¹, that information will be imported and listed in this field.


Word Hits: Comparison;of;I-hit;Data;Browsvi;lv

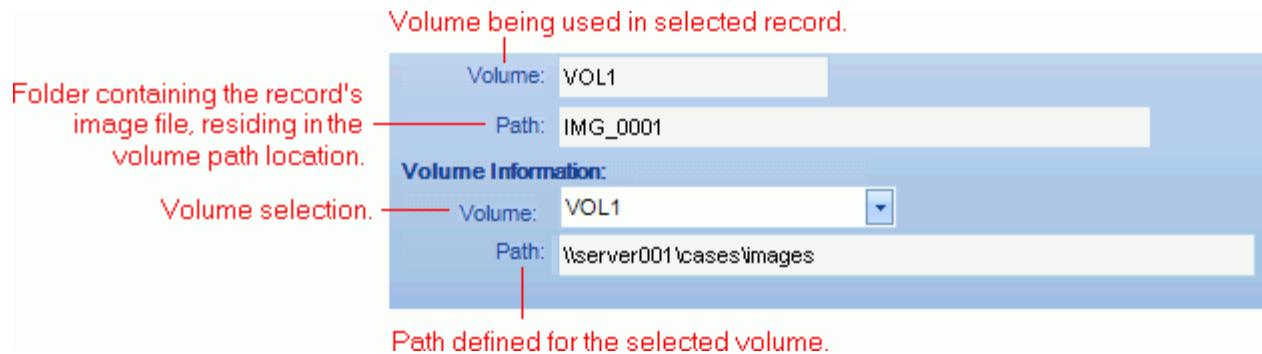
Not all fields in this area will contain information. For example, if your case has no field defined as NATIVE, the **Native File** field will be blank.

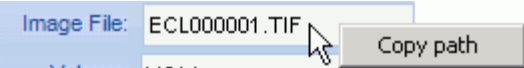
31. Word coordinates allow search hits to be highlighted on the **Image** tab.

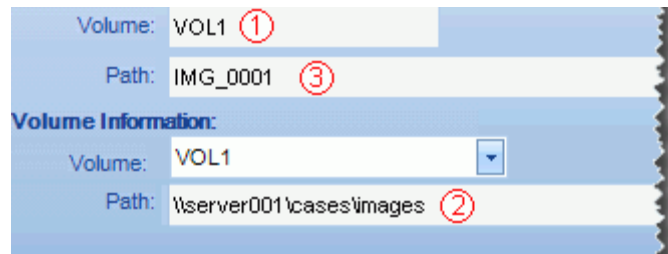
Checking the Image File Path

After completing "Getting Started" on page 11-2, select a specific page of interest in the **Documents** list and check the image file path as explained in the following steps.

1. Click  next to the **Image Path** field.
2. Check the volume and path information in the center portion of the tab as shown in the following figure. If the image is *not* found, go to [step 3](#).





3. If needed, verify or document the complete path being used for the image file by right-clicking in the **Image File** field and selecting **Copy Path**, then pasting the path in a text or other file. The complete path and filename are included.
 
4. Image path problems may occur in the following areas:





Make corrections as listed in the following table.

Correcting Image Path Problems

Issue		Solution
1	Selected volume is wrong	<p>For a single document, select the correct volume from the Volume list.</p> <p> TIP: To see the change, you may need to click a different record, then click the record for which you made the change.</p> <p>To change the volume for several documents, or if the correct volume does not exist, see "Managing Volumes" on page 7-28.</p>
2	Volume path is wrong	<p>For a single volume, correct the volume's path as follows:</p> <ol style="list-style-type: none"> 1. Define the correct path: <ol style="list-style-type: none"> a. Click . b. Navigate to and select the correct folder. c. Click OK. 2. Click Set Volume Path. <p>If several volume problems exist, correct them as explained in "Managing Volumes" on page 7-28.</p>
3	Defined path is wrong	<p>To correct the path within the volume location, see "Managing Volumes" on page 7-28.</p>

Reviewing Import Job History

To review the details of all imports to the case:

1. Access one of the database records tabs in Eclipse SE Administration as described in "[Getting Started](#)" on page 11-2.
2. On the right side of the tab, click **Import Job History**.
3. Click  next to the import date of interest and review the import details:
 - Job Name
 - User ID
 - Import Fields - click  to view the fields imported in the selected job.
4. When finished, click **Close Window**.

Deleting Pages or Documents



CAUTION! Documents or pages may be deleted without a confirmation message. Be certain of your actions before proceeding.

To delete pages or documents:

1. Access the **Database Records** tab in Eclipse SE Administration and list all documents.
2. Review the **Documents** list and identify the document(s) or page(s) to be deleted. You can delete:
 - A document and all of its pages
 - A page or range of pages within a document
 - A range of documents
 - A set of documents based on a search (documents in the search results)


For tips on locating a document, see "[Reviewing the Documents List](#)" on page [11-3](#).

3. Read the following notes, then continue with the steps in the following table, depending on what is to be deleted.



NOTES:

- The time required to complete the deletion process depends on the amount of data being deleted. If Eclipse SE Administration appears to be idle, simply wait for the process to complete.
- When you delete pages in a document (not the document itself), the associated records are deleted, as well as the "pointers" to page images. Thus, the **Image** tab for the pages will state "Image could not be found." **Extracted Text**, etc. tabs will still contain the page content.
- When documents or pages are deleted, any associated work product (redactions, sticky notes, etc.) is also deleted.
- Deleting documents or pages does not delete the actual image files (or any other files).
- Deleting documents or pages from your case requires it to be re-indexed for searching purposes. Ensure that you re-index the case as soon as possible after these procedures. (Some of the following options allow you to re-index as part of the process.)

Document/Page Delete Methods	
To delete...	Complete these steps^a...
A document and its pages	Click, then right-click the document and select Delete document . The document and its pages are deleted immediately.
A specific document page	Click, then right-click the page and select Delete page . The page is deleted immediately.
A range of documents	<p>To delete a consecutive set of documents (including all pages):</p> <ol style="list-style-type: none"> 1. Click, then right-click the first document to be deleted and select Delete document range. You can modify the Starting Doc entry or select a different image key if needed. 2. Enter the Ending Doc image key to be deleted, or click Select and choose needed image key. 3. Select Delete Documents and Pages. 4. To re-index the case later, select Skip Full Text Index Updating. Otherwise, the case will be re-indexed as the documents are deleted. <p> NOTE: Re-indexing now may cause processing delays, depending on the size of documents, number of documents, and your system resources. If you do <i>not</i> skip indexing, you can click Cancel to stop the process if needed. Documents deleted to that point will be removed from your case.</p> <ol style="list-style-type: none"> 5. Click Start. 6. In response to the confirmation message, click OK. 7. When finished, click Cancel. 8. If you selected the "Skip Index" option in step 4, after the process completes, a message will ask you if you want to rebuild the index. Click Yes to re-index the case, or No to wait until another time.

Document/Page Delete Methods (Continued)	
To delete...	Complete these steps^a...
A range of pages	<p>To delete all pages within a range of documents (not the documents themselves):</p> <ol style="list-style-type: none"> 1. Click, then right-click the first document containing pages to be deleted, then select Delete document range. You can modify the Starting Doc entry or select a different image key if needed. 2. Enter the Ending Doc image key to be deleted, or click Select and choose the needed image key. 3. Select Delete Pages Only. 4. Click Start. 5. In response to the confirmation message, click OK. 6. When finished, click Cancel.
Documents or pages based on a search	<p>To delete all documents or pages in a search-results set:</p> <ol style="list-style-type: none"> 1. Click Build Search and define/run the needed search. 2. Review the search results and ensure these are the documents or document pages to be deleted. 3. Right-click a document in the list and select Delete Document(s) in Search. 4. Select the needed option: <ul style="list-style-type: none"> - Delete Pages/Images only: Pages only will be deleted (not the documents themselves). - Delete Documents and Pages/Images: Documents, including all pages, will be deleted. 5. If you chose the "Delete Documents" option in step 4, select the Skip Full Text Index Updating option if you want to bypass indexing at this time. See the notes in the procedure for deleting a range of documents on page 11-8. 6. Click Start. 7. In response to the confirmation message, click OK. 8. When finished, click Cancel. 9. If you selected the "Skip Index" option in step 5, after the process completes, a message will ask you if you want to rebuild the index. Click Yes to re-index the case now, or No to wait until another time.

^a Perform these steps in the **Database Records** tab **Documents** list.

12 Managing the Review Process

In This Chapter

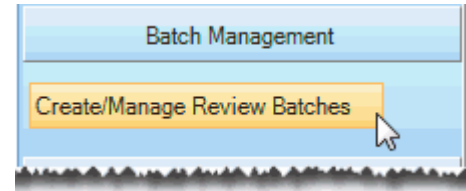
Overview	12-2
About Review Passes and Batches.....	12-2
Review Pass Basics	12-2
How Documents are Grouped	12-2
How Reviewers are Assigned	12-3
Configuration Task Order.....	12-3
Privileges Required	12-3
Before You Begin	12-3
Creating a Review Pass and Batches	12-4
Defining Basic Details.....	12-4
Setting Fields for the Review Pass.....	12-6
Assigning Reviewers	12-6
Assigning Review Pass Tag Palette	12-9
Creating Batches	12-10
Managing Review Passes	12-12
Changing Basic Review Pass Details	12-12
Changing Review Pass Fields.....	12-13
Changing Reviewer Assignments.....	12-14
Changing the Review Pass Tag Palette.....	12-14
Deleting a Review Pass.....	12-15
Managing Batches	12-16
Overview.....	12-16
Merging and Splitting Batches	12-18
Assigning Reviewers	12-20
Setting Batch Priority	12-23
Setting Batch Status	12-24
Deleting Batches	12-25
Copying the Batch List	12-26

Overview

About Review Passes and Batches

In Ipro Eclipse SE, the review process for your case documents is managed through two mechanisms:

1. **Review Passes** allow you to manage the review. For example, an initial set of batches may be used to identify and tag all documents that are totally irrelevant to the case, such as spam e-mail.
2. **Individual batches** are assigned to individual reviewers, allow you to efficiently divide the work, assign it to the correct individuals, and monitor progress.



Review Pass Basics

Review passes include documents of your choosing. For each review pass, you will define:

- The review group(s) (and optionally individual reviewers) who will be responsible for reviewing the batches.
- The fields, tag groups and/or individual tags to be used for the review. These selections can be made manually or by selecting a coding form.
- The documents to be included.
- A priority (Low, Medium, High, Critical). This priority appears in Eclipse SE Desktop to alert reviewers to the batch status. The priority can be changed after batches are created.
- The target size of each batch.
- Whether or not related documents (family members) should be included in the batches.

How Documents are Grouped

Eclipse SE Administration groups documents into batches sequentially by image key unless you define the review pass to **Batch By Category**. In this case, documents are grouped by a selected category. For example, you might group by a "DocType" category, in which case all like documents (.MSG, .DOC, .XLS, etc.) will be grouped into one or more batches based on the batch size you define. For details on categories, see page [5-19](#).

How Reviewers are Assigned

Reviewers are assigned to review passes manually as part of review pass configuration. User groups and/or users, plus specific privileges (if needed) are defined.

Reviewers are assigned to specific batches on a sequential, rotating basis, based on the user order in the group(s) assigned to the review pass, unless you make specific assignments for specific batches.

If individual users are assigned to a review pass, they are also assigned on a sequential, rotating basis as described for groups.

Configuration Task Order

Before creating a review pass, the case fields, tags, and reviewers must have been defined. To use a coding form for review, it must also have been defined.

To understand what needs to be completed before you define review passes and batches, see "[Before You Begin](#)" on page 12-3.

Privileges Required

By default, you must have Super or Case Administrator rights to define review passes and batches.

These requirements may differ if the Super Administrator modifies privileges for a particular user or group.

Before You Begin

As with other Eclipse SE Administration activities, planning will help ensure the best outcome. The following steps will allow you to get started in creating a batch:

1. Identify the **client and case** for which review passes are being defined.
2. Determine the **review pass purpose and scope**. For example, is this an initial pass to identify irrelevant or illegible documents, or a more specific pass, such as to identify and tag all privileged information? Do you want to review the entire case or a subset (perhaps based on a specific field category value)?
3. Give some consideration to **naming conventions** for review passes so that names will be meaningful and consistent. **Note:** The review pass name is used in Eclipse SE Administration, not Eclipse SE Desktop.

4. Identify the **group(s) and/or user(s)** who will work on the batch. Note that if you will be using a coding form for the review pass, any security set for the coding form will be ignored.
5. Identify whether a specific **role and/or privileges** are defined. Review "[How Does Eclipse SE Determine Privileges?](#)" on page 3-13 to understand role/privilege assignments and how they will apply to a review pass.
6. Decide which **tag groups and tags** are applicable to the review pass or see the note below regarding the use of a coding form.
7. Decide which **fields** are applicable to this review or see the following note regarding the use of a coding form.



NOTE: For steps 6 and 7, a coding form that contains the tag groups/tags and fields needed for the review pass can be used.


8. Decide whether selected documents alone, or selected and **related documents**, will be included in the review pass. If so, determine which relationships should be included – parent, child, and/or family member, and generations if applicable. For example, you may want a batch comprised only of parent documents.
9. Develop **review pass instructions** in a separate file. (Instructions can be added later if needed.)
10. Continue with "[Creating a Review Pass and Batches](#)" on page 12-4.

Creating a Review Pass and Batches

Defining Basic Details

For best results, make sure you have completed planning as explained in "[Before You Begin](#)" on page 12-3, then complete the following steps:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
3. In the Create Review Passes workspace, select the client and case for which the review pass is being created.
4. Click **Create Review Pass**, then click the new review pass in the list.
5. If needed, in the **Review Pass** field, change the default name ("Review Pass *n*," where *n* is a number).

6. To fully configure the review pass, ensure the **Status** is **Open**. (If batches should not be available immediately, change the status to **Closed**. In this case, finish review pass configuration later, when you are ready to open the review pass.)
7. If instructions exist for the batch (in a separate file such as a Microsoft Word or PDF file), select the instruction file:
 - a. Next to the **Instructions** field, click .
 - b. In the resulting dialog box, if the needed file is not .DOC, .DOCX, or .TXT, change the **File of Type** selection to **All files**.
 - c. Navigate to and select the needed file. These instructions will be available to reviewers in Eclipse SE Desktop's Case Instructions folder as long as they have access to the network location.
 - d. Click **Open**.

A link to the instruction file is included in the Case Instructions folder in Eclipse SE Desktop. For more information on this folder, see [Chapter 13, Working with Case Folders and Files](#).

8. Complete one of the following steps to define tag groups/tags and fields for the review pass:
 - To use a coding form, go to [step 9](#).
 - To configure the review pass manually, skip to [step 10](#).
9. To use a coding form to define tag groups/tags and fields for the review pass:
 - a. Select the **Use Coding Form** option and the needed coding form.
 - b. Optional: To have a document's review status change automatically to "Reviewed" when a reviewer meets all coding form rules (and applies all required tags), select **Automatically set documents to Reviewed if coding rules are met**.



TIP: Make sure reviewers know what the rules are and how the batch status will be marked.

10. Continue with the following procedures as needed to define all aspects of the review pass and create its batches:
 - "[Setting Fields for the Review Pass](#)" on page 12-6 (if not using a coding form)
 - "[Assigning Reviewers](#)" on page 12-6
 - "[Assigning Review Pass Tag Palette](#)" on page 12-9 (if not using a coding form)
 - "[Creating Batches](#)" on page 12-10 (includes document selection and batch organization)

Setting Fields for the Review Pass

After defining basic details (page 12-4), if you are not using a coding form, select the fields to be available to reviewers in the Eclipse SE Desktop's Documents pane (Record View or Case View, Search Results, etc. tab) as follows:

1. In the Create Review Passes workspace, ensure the needed client, case, and review pass are selected.
2. Click the **Fields** tab.
3. For each field to be included, click the option box, , in the **Available Fields** list, or click **Select All** to make all fields available.
4. To change field order, in the **Displayed Fields** list, click the name (not the option box) of a field to be moved. Click the **Up/Down** buttons until the field is in the needed location.
5. When finished, click **Apply**.
6. Continue with other procedures in this section to define the review pass.

Assigning Reviewers




NOTES:

- Super Administrators are not assigned to batches (either as part of a group or an individual user). Any Super Administrator has the ability to open any available batch in any case. When this occurs, the batch is assigned to the Super Administrator.
- For a review pass that is using a coding form, if users/groups are defined for the coding form itself, the review pass assignments will override those of the coding form.


Assign groups

After defining basic details (page [12-4](#)), assign a review group(s) to your review pass as follows:

1. In the Create Review Passes workspace, ensure the needed client, case, and review pass are selected.
2. Click the **Groups and Users** tab.
3. In the **Groups** section of the tab, click .
4. Select the group(s) that will be reviewing the case. Click **Select All** to choose all groups.
5. Click **OK**.
6. Continue with the following reviewer-related procedures as needed. When finished, continue with other procedures in this section to define the review pass.
 - "[Assign individual users](#)" on page [12-7](#)
 - "[Set role/privileges at the review pass level](#)" on page [12-8](#)

Assign individual users

After defining basic details (page [12-4](#)), if you need to assign individual users to your review pass (in addition to or instead of assigning groups), complete the following steps:

1. In the Create Review Passes workspace, ensure the needed client, case, and review pass are selected.
2. In the Create Review Passes workspace, click the **Groups and Users** tab.
3. In the **Users** section of the tab, click .
4. Select the users who will be reviewing the case. Click **Select All** to choose all users.
5. Click **OK**.

Set role/privileges at the review pass level

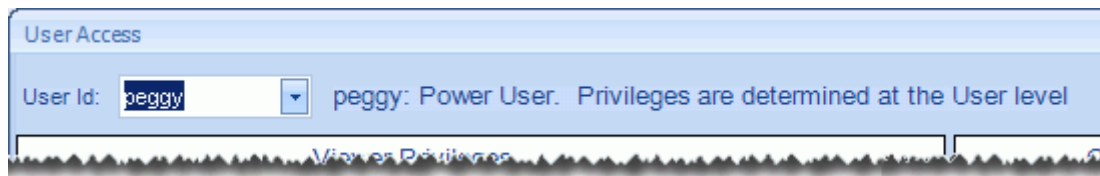
Review "[Eclipse SE Security Basics](#)" on page 3-4 to understand role and privilege settings.



NOTE: A reviewer will typically be assigned as the member of a group or as an individual user, not both. In the unusual case that a user *is* assigned as both, any role/privileges assigned at the **Review User** level will take precedence over role/privileges assigned at the **Review Group** level.

After defining basic details (page 12-4), assign a role/privileges for a review pass as follows:

1. In the Create Review Passes workspace, ensure the needed client, case, and review pass are selected.
2. On the **Groups and Users** tab, click the group or user that is to have a role/privileges in conjunction with the selected review pass.
3. To **review** existing role/privilege settings:
 - a. Click the group or user of interest.
 - b. In the applicable section (**Groups** or **Users**), click **View > Access**.
 - c. If you selected a group, note the user whose privileges are being displayed.
 - d. Review the existing security settings in the User Access dialog box. Note individual settings, and at the top of the dialog box, note the statement on how privileges have been determined (shown in the following figure).



- e. If you selected a group, choose another user from the **User Id** list and review their settings. Repeat for other group members.
- f. When finished, click **Close**.
- g. Repeat these steps for all group members and/or all users assigned to the review pass. The

The privileges you review will be in effect unless you change them in the next step.

-
4. If you need to **change** privileges for the review pass:
 - a. Click the group or user whose privileges are to be set for the review pass.
 - b. In the applicable section (**Groups** or **Users**), click **Modify > Modify Role and Privileges**.
 - c. Select a particular role, or select individual privileges that should be in effect for the selected group or user for this review pass.
 - d. When finished, click **OK**.
 - e. Repeat these steps for other groups or users assigned to the review pass.
 5. If you need to **remove** role/privilege settings made for the review pass (such that group or user-based settings will apply):
 - a. Click the group or user whose review-pass privileges are to be removed.
 - b. In the applicable section (**Groups** or **Users**), click **Modify > Clear Role and Privileges**.
 - c. As needed, repeat these steps for other groups or users assigned to the review pass.
 - d. Repeat these steps for other groups or users for which review-pass privileges are to be removed.


Assigning Review Pass Tag Palette

After defining basic details (page 12-4), if you are not using a coding form, assign tag groups (and optionally specific tags) for your review pass as follows:

1. In the Create Review Passes workspace, click the **Tags** tab, then click **Modify Tag Palette**.
2. In the Select Tags dialog box:
 - Click **Select All** to choose all tag groups and tags.
 - Click individual groups.
 - If needed, click individual tags within groups to customize the tag groups for this review pass. (The group to which a tag belongs will also be selected.)
3. Click **OK**.
4. Continue with other procedures in this section to define the review pass.

Creating Batches

After you have defined all aspects of the review pass, complete the following steps:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the **Create Review Passes** workspace, select the needed client, case, and review pass.
3. Click the **Create Batches** tab and complete [step 4](#), [5](#), or [6](#) to select the documents to batch.
4. To select all case documents for the review pass, click **Entire case**, then skip to [step 8](#).
5. To select a range of documents, enter the starting and ending image key numbers in the corresponding **Start Image Key/End Image Key** fields.
Or, click  and select the needed image key(s).
When finished, skip to [step 8](#).
6. To use search results for the review pass:
 - a. Click the **Advanced Search** button, then **Build Search**.
 - b. Define and run a search. For details on searching, see the *Ipro Eclipse SE Search Reference*.
 - c. Skip to [step 8](#).
7. To batch documents based on a field's category(ies) instead of organizing them in numerical order by image key:
 - a. Select the **Batch by Category** option.
 - b. Select the needed field from the **Category Field** list.
 - c. Optional: Batch documents based on a field's category values by selecting the needed values in the **Additional Options** table. (If none are selected, then all values will be batched.)
 - d. Go to the next step.



TIP: To set different priorities for different category value(s), select only the value(s) corresponding to a certain priority, create batches for the value(s), then repeat the procedure for other values/priorities.

Batch priority appears in Eclipse SE Desktop to alert reviewers to the project status.

8. Enter a **Target Batch Size** (if the size shown is not acceptable). Note that batch size can be from 10 - 1000 documents.
9. Select the **Batch Priority**. This priority will be applied to every batch that is created. It can be used for batch management. Note that batch priority can be changed after batches are created.
10. If batches are based on categories, skip to step [step 11](#). Otherwise, if needed, select the **Include Family Documents** option to batch related documents together. Note:
 - This option creates batches that include related documents.
 - The target batch size will be overridden if the size of a family exceeds the limit. Families are not broken apart.
11. Click **Create Batches**. Eclipse SE Administration creates batches for the review pass based on your selections.



NOTE: The batching process may take significant time, depending on your system resources and how many documents are being batched. For example, to process 1 million documents may take two hours. If Eclipse SE Administration appears to be in a non-responsive state, it is processing batches.

12. When the process is completed, note the details in the "Finished" message and click **OK**.
13. Continue with the procedures in the following section.


Managing Review Passes

After a review pass is defined and batches created, you can change the definition if needed.

Changing Basic Review Pass Details

To evaluate and/or change the basic details for a review pass:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. Click the **Review Pass Details** tab. Complete the following steps as needed.
4. Check the summary at the top of the tab for an overview of the review pass. In particular, note:
 - **Unbatched Documents**: New batches can be created from these documents.
 - **Unassigned Batches**: Assign reviewers to these batches.
 - **On Hold Batches**: Resolve issues so the batches can be reviewed.
5. **Review Pass**: If needed, revise the name.
6. **Status**: Change the status from **Open** to **Closed** to prohibit access to the review pass in Eclipse SE Desktop. (You will not be able to modify the review pass in Eclipse SE Administration, either.) Alternatively, open a closed review pass.

-
7. **Instructions:** Add new batch instructions. To do this:
 - a. Next to the **Instructions** field, click .
 - b. In the resulting dialog box, if the needed file is not .DOC, .DOCX, or .TXT, change the **File of Type** selection to **All files**.
 - c. Navigate to and select the instructions file for the review pass. These instructions will be available to reviewers in Eclipse SE Desktop's Case Instructions folder as long as they have access to the network location.
 - d. Click **Open**.
 8. Alert reviewers to the changes.

Changing Review Pass Fields

To change the fields to be visible for a review pass:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the Create Review Passes workspace, click the **Fields** tab.
4. Evaluate the currently assigned fields and those that are not assigned.
5. Add fields to or remove them from the **Displayed Fields** list. Refer to "[Setting Fields for the Review Pass](#)" on page 12-6 for tips.
6. When changes are complete, click **Apply**.
7. Alert reviewers to your changes (and any process changes that may result). Users may need to re-open batches they are working on in order for changes to take effect.

Changing Reviewer Assignments

To change which groups and/or users are assigned to the review pass, or role/privilege assignments:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. Click the **Groups and Users** tab.
4. Evaluate current assignments.
5. Make changes to assignments and role/privilege settings as needed. See ["Assigning Reviewers"](#) on page 12-6 for procedure details.
6. Alert reviewers to your changes (and any process changes that may result). Users may need to re-open batches they are working on in order for changes to take effect.

Changing the Review Pass Tag Palette


To change tag palette for the review pass:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. Click the **Tag Palette** tab.
4. Evaluate currently assigned tags.

5. Make changes as needed. See "[Assigning Review Pass Tag Palette](#)" on page 12-9 for procedure details.
6. Alert reviewers to your changes (and any process changes that may result). Users may need to re-open batches they are working on in order for changes to take effect.

Deleting a Review Pass

To delete a review pass:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. Above the list of review passes, click .
4. In response to the confirmation message, click **OK**.
5. Alert reviewers to your changes (and any process changes that may result).

Managing Batches

Overview

Manage Batches tab details

The **Manage Batches** tab of the Create Review Passes workspace presents information about the review pass and batches that have been created for a particular case. It also allows you to assign and manage batches. The following details are included on the **Manage Batches** tab. Scroll vertically and/or horizontally to see all details in the tab.

Manage Batches Tab Details

Item	Description
Batch Id	Batches are numbered sequentially for each case (across review passes). All batches are listed on the Manage Batches tab.
Batch Size	The number of documents in each batch.
Priority	The priority of each batch (can be selected on this tab). The exact meaning of each priority should be decided for your organization and explained to reviewers.
Assigned To	The person assigned to a batch (either explicitly by the administrator or implicitly by the person selecting the batch when they log in).
Last Accessed	The date and time the reviewer last opened the batch and performed an action.
Docs Reviewed	The number of documents for which the Reviewed tag has been set in Eclipse SE Desktop, indicating the review is completed.
Not Reviewed	The number of documents not started and in process.
Docs on Hold	The number of documents for which the On Hold tag has been set in Eclipse SE Desktop, indicating some issue with the documents.

Manage Batches Tab Details (Continued)

Item	Description
Status	Current condition of the batch (by default, status will change based on reviewer assignment or action; can also be selected on this tab.)
Delete	Individual batches can be deleted if needed. The documents in such batches are identified as "unbatched" and are available for new batches.

Getting started

After you have completed "[Creating a Review Pass and Batches](#)" on page 12-4, get started with batch management as follows:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. Click the **Manage Batches** tab.
4. If needed, find needed batches by sorting one of the columns. Click the column heading; click the heading again to reverse the sort.

Alternatively, you can filter the batch list by a particular status by selecting the needed status in the **Filter By** list. For example, you might want to view/work with only batches that are unassigned.

Merging and Splitting Batches

It may be necessary to combine a set of batches into a single batch or to split a batch into one or more batches.



Merge batches

To merge batches:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, select the needed batches.
 - To select a contiguous set of batches, drag through the needed batches in the Batch Id column. Or, click the first batch and Shift+click the last batch in the set.
 - To select non-contiguous batches, click the first batch of the set and Ctrl+click additional batches.
4. Click **Merge**.
5. In the Merge Batches dialog box, select the batch into which the other batches will be added. The batch ID of the selected batch will be maintained; the other batch IDs will be removed from the list in the **Manage Batches** tab.
6. Select the **Priority** and **Status** for the merged batch.
7. Select the user who will be assigned to the batch. Those listed were assigned to the batches that are being merged. (If no users have been assigned, the user must be assigned after this procedure is completed.)
8. When finished, click **OK**.
9. If the merged batch was unassigned, assign a reviewer as explained on page [12-22](#).

Split Batches

To split a batch:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, select the batch to be split.
4. Click **Split**.
5. In the Move Batch Pages dialog box, click **Unbatched**.
6. Identify the documents to be moved from the selected batch to a new batch(es).
 - Scroll in the documents list to see all documents.
 - Sort by document ID or image key by clicking the heading. Click again to reverse the sort.
7. Select the documents to be moved.
 - To select a contiguous set of documents, click the first document and Shift+click the last document in the set.
 - To select non-contiguous documents, click the first document of the set and Ctrl+click additional documents.
8. Click . Selected documents will be moved to the **Unbatched** set.
9. Adjust the documents if needed:
 - If additional documents should be added to the new batch(es), repeat [step 6](#) through [step 8](#).
 - To return the unbatched documents to the existing batch, select **Unbatched** and click .
10. When the number of unbatched documents is correct, click **OK**.
11. To add the unbatched documents into new batches, click the **Create Batch** tab and set needed options. For details, see "[Creating Batches](#)" on page [12-10](#).



NOTE: Options will apply only to unbatched documents. For example, if you select the **Entire Case** option, all unbatched documents in the case will be batched. If you select **Image Key Range**, the range must comprise unbatched documents.

12. Click **Create Batches**. New batches are created; batch IDs will be the next available numbers in the review pass.
13. Assign reviewers as explained on page 12-22 and if needed, a priority (page 12-23).
14. Repeat these steps to split other batches.

Assigning Reviewers

Reviewers (as defined by the review pass) can be assigned or changed, any time after review batches are created. If you change assignments after a case is started, be sure to inform the affected reviewers.

See also "[Changing Reviewer Assignments](#)" on page 12-14 for details on changing which groups or users are available for assignment.

Assign batches to reviewers automatically

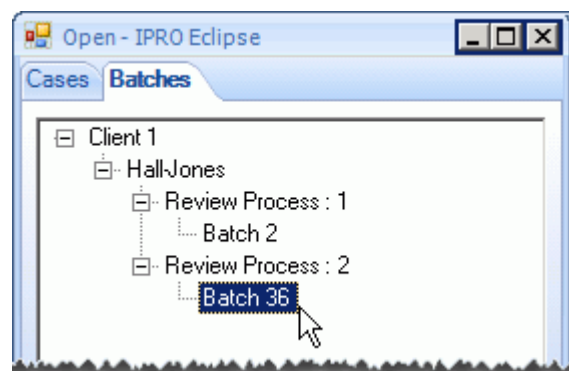
Eclipse SE Administration can assign reviewers to batches automatically as explained in the following procedures. In this case, selected reviewers are assigned on a rotating basis throughout selected batches.

Completely automatic assignment

By default, if you make no assignments, Eclipse SE Administration will distribute batches to reviewers automatically when they log in and select a particular review pass.

In the following example, the administrator has made *no* assignments for either review pass. In Review Pass 1, Batch 2 is the next available unassigned batch; in Review Pass 2, Batch 36 is the next available batch.

Once a batch is selected and opened, it will be the only batch available to the reviewer for the associated review pass until the batch is completed.



Directed automatic assignment


In addition to completely automatic batch assignment, batches can be assigned automatically to reviewers of your choosing. To do so:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, select the needed batches.
 - To select a contiguous set of batches, drag through the needed batches in the Batch Id column. Or, click the first batch and Shift+click the last batch in the set.
 - To select non-contiguous batches, click the first batch of the set and Ctrl+click additional batches.
4. When all batches are selected, right-click one of the selected batches in the **Batch Id** column and select **Assign Batches**.
5. In the Assign Batches dialog box, select group(s) and/or user(s) to be assigned, then click **OK**.

Members of selected group(s) and/or individual users who have been selected will be assigned to the batches in as even a manner as possible. For example, if you select 100 batches and assign a group with 5 members, each group member will be assigned 20 batches.


Assign a reviewer to an individual batch

To assign a reviewer to an individual batch:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, locate the batch you want to assign.
4. For the identified batch, click the name in the **Assigned To** column, then click  and select the needed reviewer.
5. Repeat as needed to assign other reviewers to batches.

Remove a reviewer from a batch

To remove a reviewer from a batch, so that the batch status is **NotAssigned**:

1. Getting started:
 - a. In Eclipse SE Administration, lick the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, locate the batch you want to be unassigned.
4. For the identified batch, click the label in the **Status** column, then click  and select **NotAssigned**.
5. Repeat as needed to remove other batch assignments.

Setting Batch Priority


About batch priorities

Batch priority (Low, Medium, High, and Critical) can be used to manage batches; alerts can be sent to reviewers based on priorities. The exact meaning of these priorities should be defined by your organization.

Priority can be set when batches are first created, for all batches in the review pass. Or, priority can be set for individual batches after they are created.

Procedure

To assign priority to an individual batch:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, locate the needed batch.
4. Click the status for the identified batch, then click  next.
5. Repeat as needed to assign priority to other batches.

Setting Batch Status


About statuses

For any batch, the status may be as follows:

- **Assigned:** A specific user is tasked to review the batch. The status is automatically set when a user is assigned. The user will have access to the batch in the order of batches assigned.
- **Closed:** Review activities for the batch are complete. This status may be set when all documents have been marked as “Reviewed” or “On Hold” in a batch within Eclipse SE Desktop, or by an administrator in Eclipse SE Administration. Closed batches are not available in Eclipse SE Desktop, but remain in Eclipse SE Administration for administrative purposes.
- **In Process:** A user has started reviewing the batch. This status is automatically set when a user starts working on a batch in Eclipse SE Desktop, or if an administrator sets it in Eclipse SE Administration.
- **Not Assigned:** No one has been given responsibility for the batch (or an assignment has been withdrawn).
- **On Hold:** Review activities need to be postponed. Placing a batch on hold stops further review activities. Any completed review activities are kept intact. Reviewers, however, cannot open a batch that is on hold.

Procedure


To assign a batch status in Eclipse SE Administration:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. On the **Manage Batches** tab, locate the batch for which the status should change.
4. For the identified batch, click the label in the **Status** column, then click  and select the needed status.
5. Repeat as needed to assign a status to other batches.

Deleting Batches

Batches can be deleted from a review pass. Documents from deleted batches become unbatched. They can be used to create new batches if needed.

To delete a batch(es):

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. To delete a single batch:
 - a. On the **Manage Batches** tab, locate the batch to be deleted.
 - b. For the identified batch, click  in the **Delete** column.
 - c. In response to the confirmation message, click **OK**.
4. To delete multiple batches:
 - a. On the **Manage Batches** tab, select the batches to be deleted.
 - To select a contiguous set of batches, drag through the needed batches in the Batch Id column. Or, click the first batch and Shift+click the last batch in the set.
 - To select non-contiguous batches, click the first batch of the set and Ctrl+click additional batches.
 - b. Right-click in the selected batches and choose **Delete Batches**.
 - c. In response to the confirmation message, click **OK**.
5. On the **Review Pass Details** tab, note the number of unbatched documents.

Copying the Batch List

To copy the batch list:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Batch Management** menu and click **Batch Management**.
2. In the Create Review Passes workspace, select the needed client, case, and review pass.
3. In the Create Review Passes workspace, if the needed client, case, and/or review pass have not been selected, select them.
4. Click the **Manage Batches** tab.
5. Select the entire list or a portion of it.
 - To select the entire list, click in the list and press Ctrl+A.
 - To select a portion of the list, click the **Batch Id** for the first row to be included, then Shift+click the **Status** for the last row to be selected.
6. When the batches you want to copy are selected, press Ctrl+C.
7. In a text, spreadsheet, or other appropriate file, press Ctrl+V. The selected batch details are pasted in tab or column-delimited format.

13 Working with Case Folders and Files

In this Chapter

Overview	13-1
Working with Case Folders	13-2
Folders Containing Files.....	13-2
Folders Containing Records.....	13-3
Transcripts Folder.....	13-3
Working with Case Instructions, Alerts, and Documents	13-4
Adding Documents.....	13-4
Changing case instructions, alerts, or documents.....	13-5
Deleting instructions, alerts, or documents from a case.....	13-6

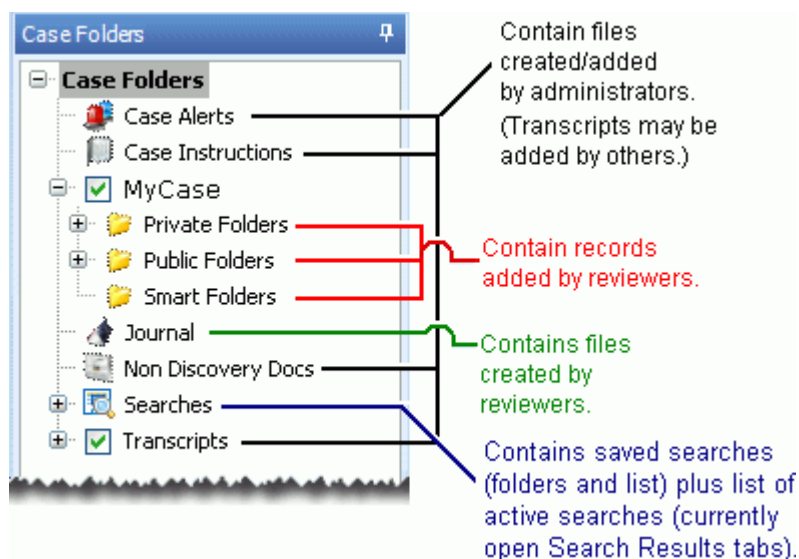
Overview

In the Ipro Eclipse SE Desktop, **case folders** provide a place to organize information (files or specific records of the case) to assist with case reviews.

As shown in this figure, some folders are under the jurisdiction of the Eclipse SE administrator, while others are maintained by users.

Case files provided by the administrator include case alerts, instructions, and other documents related to the case (non-discovery documents). Case files can be any appropriate format, such as Microsoft Word, plain text, or PDF.

This chapter provides an overview of Eclipse SE Desktop case folders and explains the administrative procedures for providing case documents.



Working with Case Folders

Folders Containing Files

Folders maintained by administrators

Folder contents

The folders containing files that you (the administrator) will create and manage for reviewers and users include:

- Case Alerts
- Case and Batch Instructions
- Non-Discovery Documents

These folders are explained in the following table. This table lists an intended use for each type of file, but you may prefer to expand the use. In any case, it is important for you to communicate to reviewers what they can expect to find in these folders and when they should check them for information.

Folder	Documents
Case Alerts	Intended as ongoing notifications to reviewers about cases. For example, an alert might be created notifying reviewers that instructions for a particular case have changed.
Case Instructions	Intended to include the procedures and information needed for reviewers to work through a case.
Batch Instructions	Batch instructions: Intended to provide details specific to a particular review pass. For example, tagging criteria and guidelines, redaction information, whether reviewer is working with documents or pages in a document, and so forth. To add review pass instructions, see "Creating a Review Pass and Batches" on page 12-4.
Non-Discovery Docs	Other documents: Any documents pertinent to a case that are not discovery documents can be provided to assist users. For example, exhibits or legal briefs.

File types

The files included in these folders can be any type, such as Microsoft Word, text, or PDF, as long as the program resides on the users' computers.

File location

Files comprising case alerts, instructions, and non-discovery documents need to be placed in a network location(s) accessible by all Eclipse SE Desktop users. The location is maintained by Eclipse SE Administration as a fully qualified UNC path(s), but not in the Eclipse SE database (as case documents are).

Folders maintained by reviewers

The **Journal** folder is a location in which reviewers can create notes for themselves using a simple text editor. See the *Ipro Eclipse SE User's Guide* for details on working with the **Journal** folder.

File type

Journal files are saved as .JNL files.

File location

Journal files are saved to a location of the user's choice. The location is maintained by Eclipse SE Administration as a fully qualified UNC path, but not in the Eclipse SE database (as case documents are).

Folders Containing Records

Folders in which users can place records (actually, "pointers" to specific records) include the **Private** and **Smart Folders**. See the *Ipro Eclipse SE User's Guide* for details on working with these folders.

Transcripts Folder

The **Transcripts** folder is located in the **Case Folders** tab of Eclipse SE Desktop. See [Chapter 13](#) for details on importing and managing transcripts.

Working with Case Instructions, Alerts, and Documents

Adding Documents


To add communications for a *case*, complete the following instructions. To add communications for a *review pass*, see "[Creating a Review Pass and Batches](#)" on page 12-4.

1. Create one or more files in an appropriate program (for example, Microsoft Word).



NOTE:

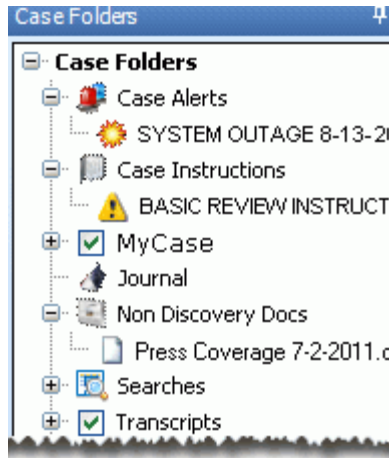
- The program required to view the file must be installed on reviewers' computers.
- The file must be saved to a location accessible by reviewers.


2. In Eclipse SE Administration, click the **Case Management** tab.
3. In the navigation panel, expand **Client/Case Management** menu and click **Case Management**.
4. In the Case Management workspace, select the needed client and case, and review pass.
5. In the Case Management workspace, select the needed client ID and case from the lists on the left side of the window.
6. Click the **Case Details** tab and then click the tab for the type of file you are adding: **Instructions, Alerts, or Case Documents**.
7. On the applicable tab, click the Add Link button, .
8. In the Select file dialog box and navigate to/select the needed file. Make sure that a UNC path is used.



TIP: To select multiple files, click the first file in the set, then Shift+click or Ctrl+click other files as needed.

9. Click **Open**. Each selected file is added to the case as an instruction, alert, or case (non-discovery) document. It will be available to reviewers in the Case Folders pane of Eclipse SE Desktop the next time they log in to Eclipse SE Desktop, as shown in the following figure.



10. **Case Documents Only:** To index case (non-discovery) documents, click . Indexing these documents enables them to be searched in Eclipse SE Desktop.

Important! Re-index documents whenever documents are added.

Changing case instructions, alerts, or documents

If case communications need to be changed, do so in the source program and save the file to its original location. Reviewers will see the changed instructions, alerts, or documents the next time they log in to Eclipse SE Desktop and open the corresponding folder.





TIP: An alert icon is added next to all added/revised alerts and instructions to notify reviewers that information has changed and should be checked. See the previous figure for examples of these indicators.

After a user opens a document, the corresponding icon is removed.

Deleting instructions, alerts, or documents from a case

To delete instructions, alerts, or documents from a case:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand **Client/Case Management** menu and click **Case Management**.
3. In the Case Management workspace, select the needed client and case, and review pass.
4. Click the **Case Details** tab, then click the tab for the type of file you are deleting: **Instructions**, **Alerts**, or **Case Documents**.
5. Click item to be deleted, then click the Delete Link button, .
The case instruction, alert, or document will be removed from the case.
The file, however, will still exist in your file system (unless you remove it).
If a reviewer is working on the case in Eclipse SE Desktop, the item will be listed until the reviewer refreshes or quits the Desktop.
6. **Case Documents Only:** If you delete case (non-discovery) documents, re-index the documents by clicking  on the **Case Documents** tab.

14 Configuring and Managing Print Servers

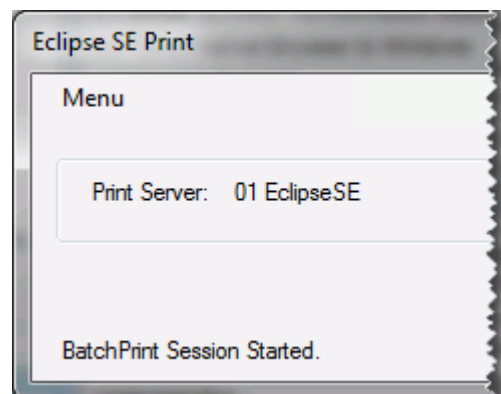
In this Chapter

Overview	14-1
About the Print Manager	14-1
Privileges Required	14-1
Before You Begin	14-2
Configuring Eclipse SE Printer Servers	14-2
Managing Print Activities	14-4
Change Print Manager Display	14-4
Change Existing Print Server Configuration	14-4
Activate Auto-polling	14-5
Manage Print Jobs	14-6
Create a History Report	14-6

Overview

About the Print Manager

The Ipro Print Manager is an optional Eclipse SE module (purchased separately) that allows you to configure one or more central printers ("batch" printers) for use in Eclipse SE Desktop. Use of a batch printer frees up the resources of individual users' computers and allows administrative control of various print options, such as use of banner sheets and printer-specific settings.



Privileges Required

You must have Super Administrator rights to configure and manage printer servers for Eclipse SE.

Before You Begin

For greatest efficiency, identify the following aspects of printer server configuration before you begin:

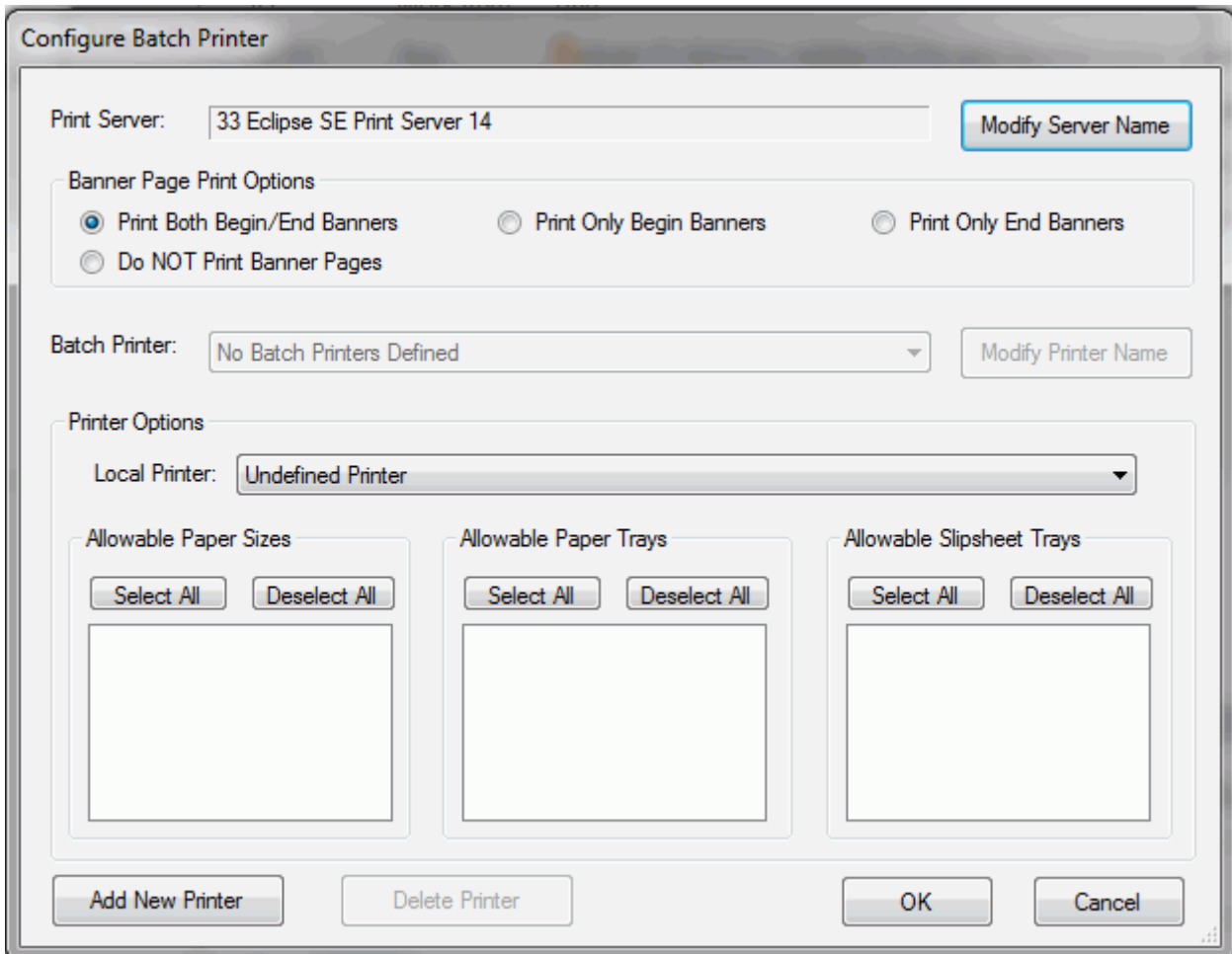
- Printer server names: Identification of the print servers configured within the Print Manager.
- Use of banner pages to separate print jobs
- Printer(s) to be used for each print server
- A "batch printer" name (listed as an available printer in Eclipse SE Desktop)
- Printer options, including paper sizes, paper trays, and slipsheet paper trays

Configuring Eclipse SE Printer Servers

If the Ipro Print Manager has not been installed, install it as explained in the *Eclipse SE Installation and Configuration Guide*.

To configure a printer server for Eclipse SE:

1. From the Start menu, select **Programs > Ipro Tech > Eclipse SE > Eclipse SE Print**. The Eclipse Batch Print Server starts.
2. The first time you start the Print Manager:
 - a. In the Login dialog box, click **Configure**, select the system directory configured for other Eclipse SE products, and click **OK**.
 - b. Complete the Login dialog box with Super Administrator user name and password.
 - c. Click **OK**.
3. Select **Menu > Configure Print Server**.
4. If the Login dialog box appears, enter the Super Administrator user name and password and click **OK**.
5. In the Select Print Server dialog box, click **Create New Print Server**.
6. Enter a name for the print server and click **OK**. (This name is used in the Print Manager.)
7. Complete the Configure Batch Printer dialog box as shown in the following figure and described in the following steps.



Print Server Configuration

8. Select the needed **Banner** option. Banner pages are added for each print job.
9. Click **Add New Printer**, enter a name to be used in the Eclipse SE Desktop printer listing, and click **OK**.
10. **Batch Printer**: Ensure that the printer defined in [step 9](#) is selected in the **Batch Printer** field.
11. **Local Printer**: Select the actual printer to be used when the batch printer is selected.

12. **Options:** Select which paper sizes, paper trays, and slipsheet trays will be allowed for selection by users. (Slipsheets are used to separate documents within a print job.)
13. Repeat steps 9 - 12 to define additional printers.
14. When all printers are defined, click **OK**.
15. To define additional print servers, repeat this procedure.
16. To activate a particular server (make the Batch Printers available in Eclipse SE Desktop):
 - a. Select **Menu > Select Print Server**.
 - b. Select the needed server and click **OK**.

Managing Print Activities

Change Print Manager Display

The Eclipse SE Print window will remain on your desktop unless you take one of the following actions:

- Select **Menu > Minimize Display**.
Click the Eclipse SE Print icon in the Windows status bar to reopen it.
- Select **Menu > Hide Display**.
To reopen Eclipse SE Print, right-click its icon in the Windows system tray and select **Show Display**.
- Select **Menu > Close** to quit working with Eclipse SE print servers.

Change Existing Print Server Configuration

To modify an existing print server's configuration:

1. In Eclipse SE Print, select **Menu > Configure Print Server**.
2. If the Login dialog box appears, enter the Super Administrator user name and password and click **OK**.
3. Select the needed print server and click **OK**.
4. Complete any of the following steps to modify the print server configuration.
5. Revise print server name: Click **Modify Server Name**, make needed changes, and click **OK**.
6. Banners: Select a different banner option.

7. Batch printer name: Click **Modify Printer Name**, make needed changes, and click **OK**.
8. Local printer: To revise a local printer's settings, select the printer and then change paper size, etc., options as needed.
9. Delete batch printer: Select the printer, click **Delete Printer**, and click **OK** in response to the confirmation message.
10. To add a new batch printer, click **Add New Printer**, enter a name and click **OK**. Next, select local printer and options.
11. When all changes are complete, click **OK**.

Activate Auto-polling

Auto-polling allows the print server to automatically look for and process print jobs that users submit to a specified batch printer. With auto-polling, the print server is on a dedicated workstation.

If auto-polling is not used, you will need to manually start print jobs as described in "[Manage Print Jobs](#)," next.

The following procedure assumes that the system directory has been configured for the Print Manager and that a print server has been defined and started.

To start auto-polling:

12. In Eclipse SE Print, select **Menu > Auto-poll for print jobs**.
13. If the Login dialog box appears, enter the Super Administrator user name and password and click **OK**.

Manage Print Jobs

To manage print jobs sent to batch printers:

14. In Eclipse SE Print, select **Menu > Manage print jobs**.
15. If the Login dialog box appears, enter the Super Administrator user name and password and click **OK**.
16. Review active print jobs.
17. As needed:
 - Print the job list.
 - View and/or modify print job details.
 - Delete print jobs.
18. When finished, click **Cancel**.

Create a History Report

To generate and save or print a report on print job activity:

19. In Eclipse SE Print, select **Menu > Print history report**.
20. If the Login dialog box appears, enter the Super Administrator user name and password and click **OK**.
21. Enter the period of interest. Use the **Current** or **Previous Month** buttons to quickly select one month at a time.
22. Click **Start** to generate the report.
23. Review report details.
24. As needed:
 - Click **Save to File** to save the report to a plain text (.TXT) file.
 - Click **Print** and complete the Print dialog box to print the report.
25. When finished, click **Cancel**.

15 Working with Reports

In this Chapter

Overview	15-1
Available Reports.....	15-2
Privileges Required	15-4
Before You Begin	15-4
Using Primary Reports	15-5
Affidavit/Responsive Report	15-5
Case Data Summary Report	15-9
Case Review Summary Report.....	15-11
Case Review Summary by Category	15-15
Inactive Case Report.....	15-17
Privilege Report.....	15-18
Production Summary Report	15-20
Production Deliverables Report	15-21
Redacted Documents Report	15-24
Redacted Detail Report.....	15-25
Reviewer Detail Report.....	15-26
Shortcut Keys Report	15-31
Using Case Management Reports	15-32
About Case Management Reports	15-32
Generating Case Management Reports	15-34

Overview

Ipro Eclipse SE includes a variety of reports to assist with review tasks, administrative duties, and case oversight. Reports are presented in easy-to-use formats. The following figure shows an excerpt from a typical Privilege Report:

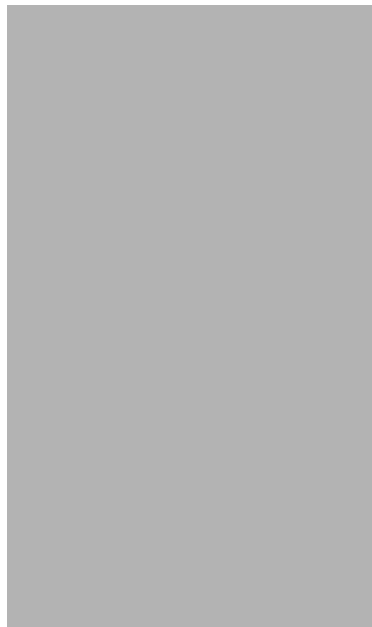


Available Reports

Currently available reports are available in two locations, as described in the following paragraphs.

Reports menu reports

The following figure shows the **Reports** menu in the **Case Management** tab's navigation panel, and the following table introduces these reports. In this chapter, these reports are referred to as "primary" reports.



Reports Menu Reports

Report	Description
Affidavit/ Responsive	Allows you to report on documents relevant to your case, such as documents that will be/have been produced for discovery. Typically based on a search that identifies needed documents.
Case Data Summary	Summarizes case size details such as number and total size (in MB) of case files and data (image, native, and/or extracted text). Report can optionally be based on any field defined with the category option. For example, if the AUTHOR field is a category field, the report could be generated to summarize case details by author.

Reports Menu Reports (Continued)

Report	Description
Case Review Summary	<ul style="list-style-type: none"> • Case Review Summary: Provides the current or final state of case documents and review activity for a selected case. • Case Summary by Category: Provides a summary of case review details organized by the category values of a selected field (a field with the Category flag set. See page 5-19 for details on the Category flag.)
Inactive Case	Lists all inactive cases in order by client. (For details on inactive cases, see " Making a Case Inactive or Active " on page 6-6).
Privilege	<p>Lists documents containing tags that have been defined with the Include in Privilege Report option (in Eclipse Administration). Optionally includes redaction details for the documents and fields defined by the user.</p> <p>One use of this report is to identify privileged documents (that is, documents that should not go to opposing counsel).</p>
Production Deliverable	Presents detailed information on production jobs completed in Eclipse Administration.
Production Summary	Summarizes production jobs completed in Eclipse SE Administration.
Redacted Documents	Summarizes redaction activity for a selected case.
Redaction Detail Report	Identifies all documents with redactions, and which redactions have been applied, plus field data as selected by the user.
Reviewer Detail	Provides detailed information on reviewer activities for a selected period of time, including day-by-day summary of time spent and editing details.
Shortcut Keys	Lists all assigned tag and field shortcut keys for a selected case. (Details are the same as those available in Case Management > Reports.)

Case management reports

The following reports are available as part of case management:

- Gaps Report
- Volume Path Report
- Duplicates Report
- Broken File Links

To access these reports, select the **Case Management** tab > **Client/Case Management** > **Case Management**, then click the **Reports** tab. Details on these reports are presented in "[Using Case Management Reports](#)" on page [15-32](#).

Deduplication reports

The following reports (log files) are created when you perform deduplication during native file ingestion:

- Deduplication details report
- Deduplication summary report

See "[Ingesting Native Files](#)" on page [9-9](#) for details on deduplication and these reports.

Privileges Required

Report access is governed by the Print Reports privilege, which allows users to generate and work with reports. By default, this privilege is given to all user roles except the Standard User. See [Chapter 3](#) for details on user and group privileges.



NOTE: Regarding the Case Review Summary, the report will display results based on the user permissions of the person running the report (that is, reporting on those tags and records they have permissions to see).

Before You Begin

Before you begin, ensure that your case is defined as required. For example, if tags are not defined with the **Include in Privilege Report** option, the Privilege Report will not include them. Make sure all aspects of a case, or review passes, are defined.

Using Primary Reports

Affidavit/Responsive Report

This report lists documents relevant to your case (as defined by a search), such as documents that will be or have been produced for discovery. Field data is included according to your selections. Following is an excerpt from a typical Affidavit/Responsive Report:



To view and/or export the Affidavit/Responsive Report:

1. Getting started:
 - a. Identify the scope of the report - either the entire case, the current search (active **Search Results** tab), a saved search, or a search you will create for the report.
 - b. In Eclipse SE Administration, click the **Case Management** tab.
 - c. In the navigation panel, expand the **Reports** menu and click **Affidavit/Responsive Report**.
2. Select the needed client and case.
3. Select one of the following options to define the scope of the report:


Affidavit/Responsive Report Scope Options

Option	Description
Entire Case	Select this option to have the report cover all case documents.
Active Query	Select this option to use the documents in the currently active Search Results tab for the report.
Saved Search	Select this option (and the needed saved search) to base the report on the saved search documents.

Affidavit/Responsive Report Scope Options (Continued)

Option	Description
Advanced Search	Select this option to base the report on a search, then define the search: <ol style="list-style-type: none"> 1. Click the Advanced Search option, then Search. 2. Define and run a search. For details on searching, see the <i>Ipro Eclipse SE Search Reference</i>.

4. Select fields to be included in the report.




 **NOTE:** By default, image keys (BEGDOC field) are included automatically in the first column of the report; fields defined as MEMO and EXTRACTEDTEXT cannot be included because of their size.

If you do not want the BEGDOC field in the report, select the **Exclude BEGDOC in Report** option.

5. If the order of fields should be changed:
- a. In the **Selected Fields** list, click a field to be moved.
 - b. Click **Up** or **Down** until the field is in the desired location. (Top-to-bottom in this list equals left-to-right in the report.)
 - c. Repeat these steps until all fields are in the desired order.
6. To eliminate a field from the report, click **Remove**.
7. To sort the report, select the **Sort Report** option and then go to one of the following steps:
- Sort on a single field: To sort the report based on the content of a single field, complete [step 8](#).
 - Use a multi-field sort index: To sort the report based on a sort index that has been previously defined³², complete [step 9](#).
 - Define a custom sort order: To define your own sort order for the report, complete [step 10](#).

32. See "[Modifying Multi-Field Sort Indexes](#)" on page 6-39 for details on creating a multi-field sort index.

8. Select a single field for sorting:
 - a. Click the **Sortkey Index** option.
 - b. Click the corresponding list to open it.
 - c. Locate and click the needed field, then skip to step [step 11](#).
9. Use a predefined multi-field sort index:
 - a. Click the **Multi-Field Index** option.
 - b. Click the corresponding list to open it.
 - c. Locate and click the needed index, then skip to [step 11](#).
10. Define a custom sort order:
 - a. Click the **Advanced Sort** option.
 - b. In the Advanced Sort dialog box's **Available Fields** list, double-click each field to be sorted.
 - c. **Sort order:** By default, data will be sorted in ascending order (smallest or lowest value first). Alternatively, it can be sorted in descending order (largest or highest value first). To change the sort order for a field, click the field in the **Fields to Sort** list and click **Sort Order**.
 - d. Repeat this step for other fields to change the sort order.
 - e. **Field-sorting precedence:** In the **Fields to Sort** list, the topmost field will be sorted first, the next field will be sorted second, and so on. To change the sorting precedence, click a field name and click **Move Up** or **Move Down** to move the field to the needed location.
 - f. Repeat this step to move other fields, until fields are in the needed order.
 - g. When finished, click **OK**.
11. Optional: Select the **Keep Families together** option to keep related documents together with sorted documents (as sorted before you run the report).
12. Click **Start**.
13. After a report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Change column width by dragging the column heading separators.

14. Optional: Export the report to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
15. Optional: Print the report:
 - a. Click **Print**.
 - b. Enter a report title (default is "Affidavit of Record").
 - c. To force all report data onto a single page, select the **Fit to Page** option.
 **NOTE:** To ensure a readable report, choose this option only for reports containing limited amounts of data.
 - d. To define print options such as printer, paper size, orientation, and margins, click **Page Setup** and complete the Page Setup dialog box.
 - e. The default system printer will be used unless you select a different printer. To do so, click **Printer** in the Page Setup dialog box, select the needed printer, choose any printer properties, then click **OK** in the printer selection dialog box.
 - f. When page setup is complete, click **OK**.
 - g. To print the report without previewing it, click **Print Report** and complete the Print dialog box.
 - h. To preview the report before printing, click **Print Preview**. Use the toolbar to evaluate or print the report:

 - i. When finished previewing, if you need to change the page setup, click **Close** and repeat steps d - f. Or, click  to print from the preview dialog box.
16. When finished, click **Cancel** to return to the online report. As needed, click **Cancel** again to return to the report's configuration options. Reconfigure the report or select another report or administrative action.

Case Data Summary Report

This report summarizes case size details such as number and total size (in MB) of case files and data (image, native, and/or extracted text). Following is an excerpt from a typical Case Data Summary Report:



IMPORTANT! The case may not include some of the fields needed to run the report, and/or the data may not be up to date.


To add and/or update these fields, see "[Validating Paths and Fields](#)" on page 7-27. Run the **Validate Image Paths** option with field options selected (see following figure). This action allows you to create and/or update field data based on Eclipse SE case analysis.



To view and/or export the Case Data Summary Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Case Data Summary**.
2. In the configuration area, select the needed client and case.
3. Select one of the following options to define the scope of the report.

Case Data Summary Report Scope Options

Option	Description
Entire Case	Select this option to have the report cover all case documents.
Image Key Range	<p>Select this option to have the report cover the specified range of documents.</p> <p>Enter the starting and ending image key numbers in the corresponding Start Image Key/End Image Key fields. Or, click  and select the needed image key(s).</p>
Advanced Search	<p>Select this option to base the report on a search, then define the search:</p> <ol style="list-style-type: none"> 1. Click the Advanced Search option, then Build Search. 2. Define and run a search. For details on searching, see the <i>Ipro Eclipse SE Search Reference</i>.

4. Select at least one of the following options to define report contents. For each file type selected, the total number of pages is reported, plus the total size in MB. Extracted text is reported in total size (MB).
5. Optionally, list size details based on a field defined with the **Category** flag, select **Group Report by Category** and the field of interest. Totals will be listed for each field value.
6. When all options are set, click **Start**.
7. After the report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use scroll bars to view all report details.
 - Sort by a particular column by clicking the column heading.
 - Change column width by dragging the column heading separators.



8. Optional: To export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
9. When finished, click **Close** to return to the report's configuration options, or select another report or administrative action.


Case Review Summary Report


This report provides graphic and tabular details on review activity (for the review passes defined for a particular case). The following figure shows an excerpt from a typical Case Review Summary Report.





View the report

To view a Case Review Summary report:












1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Case Review Summary**.
2. In the configuration area, select the needed client and case.
3. For **Report**, select **Case Review Summary**.
4. As needed, choose the types of tag data to be reported:
 - Review Pass Tag Palette Only
 - Include Page Tag Details
 - Display Tags 1% or less (without this option, rarely used tags will not be included in the report)
5. Click the **Generate** button. The report is generated in the right portion of the workspace.
6. After a report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use scroll bars to view all report details.
 - Collapse or expand different review pass sections (indicated by a )
 - Use the toolbar. Toolbar buttons are described in the following table. Several of these actions are also available on a context menu—right-click in the report.

 Report readability (particularly pie charts) will vary, depending on the amount of data that is included. For example, if a large number of tags has been applied and all applied tags are included, report quality will be degraded when viewed online, printed, or saved to PDF.

Case Review Summary Report Toolbar

Button/ Feature	Use
	Go to the first page of the report. ^a
	Go to the previous page of the report. ^a

Case Review Summary Report Toolbar (Continued)




Button/ Feature	Use
	Go to the next page of the report. ^a
	Go to the last page of the report. ^a
	Current page/total pages in report. ^a
	For large reports, stop rendering the report.
	Refresh the page.
	Print the report.
	View the page as it will be printed.
	Define page setup for printing (paper size, margins, and so forth).
	Save the report to a PDF file.
	Select from common zoom settings.
	Search for content within a report.

a Applies to the print layout view of the document.

7. As needed, print, save, or find data in the report as described in the following paragraphs.
8. When finished, select different report options and regenerate the report or select another report or administrative action.


Print the report

To print the Case Review Summary report:

1. Generate the needed report as explained in "View the report" on page 15-12.
2. On the report toolbar, click  to define page orientation, margins, and so forth.
3. Click  to evaluate the print layout of the report. Repeat step 2 if the layout needs to be adjusted; otherwise, go to step 4.
4. Click  and complete the Print dialog box. For details on printer options, refer to the manufacturer's printer documentation.

Save the report

The Case Review Summary report can be saved as a PDF file. To do so:

1. Generate the needed report as explained in "View the report" on page 15-12.
2. On the report toolbar, click , then select **PDF**.
3. In the Save As dialog box, navigate to the location to which the file should be saved and enter a filename.
4. Click **OK**.

Find report content

It is easy to find specific report content on a page-by-page basis. To search a Case Review Summary report:

1. Generate the needed report as explained in "View the report" on page 15-12.
2. On the report toolbar, enter the needed search term in the **Find** field.
3. Click **Find**. To find additional instances of the term on the current page, click **Next**.

Note: If the entire report toolbar is not visible, click  on the right side of the toolbar to access the **Find** and **Next** buttons.

4. As needed, go to other pages of the report and repeat this procedure.

Case Review Summary by Category


This report summarizes case review details; it is organized by the values of a selected category field (a field with the **Category** flag set. See page 5-19 for details on the **Category** flag.)

View the report

To view a Case Review Summary by Category ("Case Category") report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Case Review Summary**.
2. In the configuration area, select the needed client and case.
3. For **Report**, select **Case Summary by Category**.
4. As needed, choose the types of tag data to be reported:
 - Review Pass Tag Palette Only
 - Include Page Tag Details
 - Display Tags 1% or less (without this option, rarely used tags will not be included in the report)
5. From the **Category** list, select the field upon which the report should be based. The FILE_EXT field is always available for this report, as well as fields defined with the **Category** flag.
6. Click the **Generate** button. The report is generated in the right portion of the workspace.


7. After a report is generated, complete the activities in the following table as needed.

Report Action	Description
View/navigate	To view and navigate through the report efficiently, change the window size and/or use the scroll bar.
Find content	Click in the report, press Ctrl+F, and complete the Find dialog box.
Copy content	Copy report data using common keyboard commands, such as: <ul style="list-style-type: none"> • Click and drag through needed content, then press Ctrl+C. • Click in report and press Ctrl+A, then press Ctrl+C.
Save	To save the report in HTML format, click  and complete the Save As dialog box.
Print	See the following procedure.

8. When finished, select different report options and regenerate the report or select another report or administrative action.

Print the report

To print the Case Review Summary by Category Report:

1. Generate the report as explained in "[Case Review Summary by Category](#)" on page [15-15](#).
2. To print the report with default report print settings, click  and skip to [step 4](#).
3. To preview the report and define specific settings:
 - a. Right-click in the report and select **Print Preview**.
 - b. Evaluate the report and adjust print settings by using the Print Preview dialog box toolbar. See the following figure.



Print Preview Toolbar



TIPS: Custom settings include such items as margins and header/footer content and font. If you define headers and/or footers, do not select URL - it does not apply to this report.

- c. When finished, click the Print button and go to [step 4](#).
4. Complete the Print dialog box. Options depend on the printer selected and its capabilities. Refer to your printer documentation for details.

Inactive Case Report

The Inactive Case Report lists all inactive cases in order by client as shown in the following example. (For details on inactive cases, see "[Making a Case Inactive or Active](#)" on page 6-6).



To view and/or export the Inactive Case Report:

1. In Eclipse SE Administration, click the **Case Management** tab.
2. In the navigation panel, expand the **Reports** menu and click **Inactive Cases Report**. The report displays all clients with inactive cases and all of the cases.
3. Optional: Export the entire report to a .CSV file:
 - a. Click **Export to CSV**.

- b. Complete the Save As dialog box and click **Save**.
- c. In response to the success message, click **OK**.
- d. Open or import the file into an appropriate spreadsheet program.

Privilege Report

The Privilege Report Lists documents containing tags that have been defined with the **Include in Privilege Report** option (see page 5-24 for details on this option). The report may also include field data, page tags as well as document tags, and/or redaction details for the documents in the report.

To view and/or export the Privilege Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Privilege Report**.
2. In the configuration area, select the needed client and case.
3. Select tags to be included in the report. Privileged tags are displayed in bold.
4. Optional: Select fields to be included in the report. Note: Image keys (BEGDOC field) are included automatically; fields defined as MEMO and EXTRACTEDTEXT cannot be included because of their size.
5. Optional: Select page tags and/or redactions:
 - If page-level tags have been applied, select the **Include Page Tags** option to include both document and page tags in the report.
 - If redactions have been applied, select the **Include Redaction Reasons** option and one of the following related options:
 - **Summarize Detail by Document:** Include redaction detail summary.
 - **Include Page-Level:** Include redaction details for each page.
6. Click **Start Report**.
7. After a report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Sort by a particular column by clicking the column heading.

- Change column width by dragging the column heading separators.
 - If a cell's content is truncated, point to the cell to view a tooltip containing the complete content.
8. Optional: Copy report content and paste it into a spreadsheet or other appropriate file. To do so, use common keyboard commands as follows:
 - a. To select one row, click it.
 - b. To select multiple rows, click the first row and press Shift+click or Ctrl+click the last or other rows for a contiguous or non-contiguous set.
 - c. To select all rows on a page, click in the report and press Ctrl+A.
 - d. To copy selected rows, press Ctrl+C.
 - e. To paste selected content – in an appropriate file, press Ctrl+V.
 9. Optional: Export the entire report to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
 10. When finished, click **Close** to return to the report's configuration options, or select another report or administrative action.

Production Summary Report

To view the Production Summary Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Production Summary**.
2. In the report area, select the needed client and case. The report generates automatically. Details include the following:

Detail	Description
Name	The name of the production.
Date Produced	Production date and time.
Production Begin and End Bates	The image keys used for the production job (part of the Endorsement definition).
Document Count	The number of documents produced.
Page Count	The number of pages produced. This number represents the total number of image files in the production job.
Native count	The number of native files produced (whether they were included in the production job as the primary or secondary output).
Privileged Count	The number of documents containing tags that have been defined with the Include in Privilege Report option.

3. After a report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Sort by a particular column by clicking the column heading.
 - Change column width by dragging the column heading separators.

4. Optional: Export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
5. When finished, select another report or administrative action.


Production Deliverables Report

The Production Deliverables Report includes detailed information on production jobs. These are the jobs listed in **Production History** tab (available when you start a production job).


To view the Production Deliverables Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Production Deliverables Report**.
2. In the configuration area, select the needed client and case. The report generates automatically. Details include the following:


Production Deliverable Report Details

Detail	Description
Name	The name of the production.
Date Produced	Production date and time.
Beginning and Ending Bates	<p>The original (as they exist in the case) beginning and ending image keys of the documents produced.</p> <p> Note: This data will be included for production jobs created with Eclipse SE 2.8.1 or later.</p>

Production Deliverable Report Details (Continued)

Detail	Description
Production Begin and End Bates	<p>The production beginning and ending image keys of the documents produced. Production image keys are defined in the Endorsement Options section of production job configuration.</p> <p>If original image keys are used for production, this data will match the Beginning and Ending Bates image keys.</p>
Prefix	<p>If image keys were renumbered for a production job, the prefix used for renumbering is listed here.</p> <p> Note: Details will be included only if the Renumber Image Keys option was selected for the production (not the Use Field Data for Image Key option).</p>
Padding	<p>If image keys are renumbered for a production job, the maximum number of digits selected for renumbering is listed here.</p> <p>Details will be included as described in the previous note.</p>
Redaction Burned	<ul style="list-style-type: none"> • Yes = at least one redaction was selected to be included in the production job. • No = no redactions were selected to be included in the production job.
Documents Have Redactions	<ul style="list-style-type: none"> • Yes = at least one of the redactions selected to be included in the production job was used in at least one of the documents in the production job. • No = none of the redactions selected to be included in the production job was used in any of the documents in the production job.
Privileged Count	<p>The number of documents containing tags that have been defined with the Include in Privilege Report option.</p>
Markup Set Burned	<p>The redaction(s) selected to be included in the production job, whether or not the redaction exists in any of the documents in the production job.</p>
Document Count	<p>The number of documents produced.</p>

Production Deliverable Report Details (Continued)

Detail	Description
Search Criteria	<p>The criteria used to define the document set are listed, including search details if a search was used. The following figure shows some of the types of information presented in this column.</p> 

3. After a report is generated, view and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Sort by a particular column by clicking the column heading.
 - Change column width by dragging the column heading separators.
4. Optional: Export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
5. When finished, select another report or administrative action.

Redacted Documents Report

To view and/or export the Redacted Documents Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Redacted Documents Report**.
2. In the report area, select the needed client and case. The report generates automatically. Contents of the report include:
 - **Document Id**: Disregard; this is an internal number.
 - **Beg Doc**: The document ID (BEGDOC) of the document that has been redacted.
 - **Image Key**: The ID of the page that has been redacted (will be the same as the Beg Doc entry unless redactions were specifically added to pages within the document).
 - **Label**: Redaction applied to the document or page. If a document (or page) includes multiple redactions, each redaction will appear on a separate line.
3. View and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Sort by a particular column by clicking the column heading.
 - Change column width by dragging the column heading separators.
4. Optional: Export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
5. When finished, select another report or administrative action.

Redacted Detail Report

To view and/or export the Redacted Detail Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Redacted Detail Report**.
2. In the configuration area, select the needed client and case.
3. Optional: Select the fields to be included in the report.
4. Click **Start**. The report is generated; it will contain data for the fields selected for documents containing redactions, plus redaction details.
5. View and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
 - Sort by a particular column by clicking the column heading.
 - Change column width by dragging the column heading separators.
6. Optional: To export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
7. When finished, click **Close** to return to the report's configuration options, or select another report or administrative action.

Reviewer Detail Report

Overview

This report provides day-to-day or summary information on reviewer activities (such as adding redactions or tags) within batches. Several options exist for this report, including the date range it covers, which user (or all users) the report will cover, and which types of information will be included. Users assigned to the review pass/individual batches are included in this report.

The following figure shows an excerpt of a Reviewer Detail Report in which details have been summarized by user.




Generate the report

To generate a Reviewer Detail Report:

1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Reviewer Detail Report**.
2. In the configuration area, select the needed client and case.
3. Select report options as listed in the following table.
4. When all selections are completed, click **Start** and wait as the report is generated.
5. Evaluate the report as described in the next section.

Reviewer Detail Report Options

Filter Option	Description
Filter by Date Range	By default, the report includes details from the beginning of the current month to the current day. To choose another timeframe: <ul style="list-style-type: none"> • Clear this option to generate a report for the entire timeframe during which batches have been reviewed. • Select this option to restrict the report to a specific timeframe; enter needed start and end dates using the date format shown in the Start and End Date fields.
Filter by User ID	By default, the report includes data for all reviewers. If needed, select Filter by User ID and select a specific user to limit the report to that user. <p> NOTE: Users assigned to the review pass, as well as all Super Administrators, are included in this list.</p>
Details by Date or Summarize by User	Select the type of report to be generated: <ul style="list-style-type: none"> • Detail by Date lists every review date in the time period selected and user details for each date. • Summarize by User lists each user and review totals for that user for the date range selected.
Report content options	Select the details to be included in the report: <div data-bbox="626 1192 1239 1629" style="background-color: #cccccc; width: 100%; height: 100%; margin: 10px 0;"> </div> <p>Details on data corresponding to these options are presented in "View/Export the Report" on page 15-28.</p>

View/Export the Report

Once a Reviewer Detail Report has been generated, evaluate and/or export it as explained in the following steps.

1. View and navigate through the report. Tips:
 - Maximize the window.
 - Use scroll bars to view all report details.
 - Sort a column by clicking the column heading.
 - Change column width by dragging the column heading separators.
 - If a cell's content is truncated, rest the pointer on the cell to view a tooltip containing the complete content.
2. Evaluate the report data. See the following table for details.



NOTE: Data presented reflect users' work in batches during one or more user sessions per day (for Details by Date report) or for the date range specified (for Summarize by User report).

A "user session" is a time period during which user is logged into one or more batches without logging out of Eclipse SE Desktop.

Reviewer Detail Report Details

Column	Description
Date	For Details by Date report, each day's date is listed. (This column does not appear for the user summary report.)
User	User(s) for which data is presented.
Docs Reviewed	Total number of documents for which Batch Review status was set to Reviewed in the Eclipse SE Desktop.
Placed On Hold	Total number of documents for which Batch Review status was set to On Hold in the Eclipse SE Desktop.

Reviewer Detail Report Details (Continued)

Column	Description
Docs Viewed	Number of distinct document views. Note: <ul style="list-style-type: none"> • Because a document is selected by default when a batch is opened, users will have at least one view when they open a batch. • Each document viewed per user session (regardless of editing actions) is one document "view." • If a document is viewed multiple times during a session, it is counted as one view. • If a mass action (such as tagging search results) is performed, only documents actually viewed are counted.
Redactions Applied	Number of redactions applied. Changes to redactions that have already been applied (removing a redaction or changing the category) are <i>not</i> counted in this column.
Tags Applied	Number of document (not page) tags applied. Note: <ul style="list-style-type: none"> • Applying a tag increments this count by one and removing a tag decrements this count by one. For example, if two tags are applied and two are removed, the Tags Applied value will not change. • Selecting a tag or changing the selection in an exclusive tag group increments this count by one. • If multiple documents or search results are tagged, all documents are counted in this column. • Tagging of family documents counts as a single tag action. • Applying a child tag counts as a single tag action.
Total Edits	Total number of <i>all</i> actions, including: <ul style="list-style-type: none"> • All tag actions - applying, removing, and changing. • All redaction actions - applying, removing, and changing. • All field edits.
Total Time	Total time (hours and minutes) reviewer is logged into one or more batches.

Reviewer Detail Report Details (Continued)

Column	Description
Idle Time	Amount of time user is logged into a batch with no activity for 15 or more minutes.
Reviewed per hour	Total Docs Reviewed divided by Total Time (in hours).
Edits per hour	Total Edits (described above) divided by Total Time (in hours).

3. Optional: Copy some or all rows on a page and paste them into a spreadsheet, word processing, or other appropriate file. To do so, use common mouse and keyboard commands to select, copy, and paste report content:
 - Selecting content:
 - ♦ Individual row: Click the leftmost cell of the row.
 - ♦ Set of rows: Click leftmost cell of one row, then Shift+click or Ctrl+click additional rows for a contiguous or non-contiguous set.
 - ♦ All rows (per page): Press Ctrl+A.
 - Copying: After content is selected, press Ctrl+C.
 - Pasting: Open an appropriate file and press Ctrl+V.
4. Optional: To export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
5. When finished, click **Close** to return to the report's configuration options, or select another report or administrative action.

Shortcut Keys Report

This report lists the keyboard shortcuts defined for tags and/or fields in coding forms for a selected case. This report allows you to easily keep track of keyboard shortcuts, to assist in consistency and logic in the definition of shortcuts, and to communicate shortcut information to your reviewers.

To generate the Shortcut Keys Report:

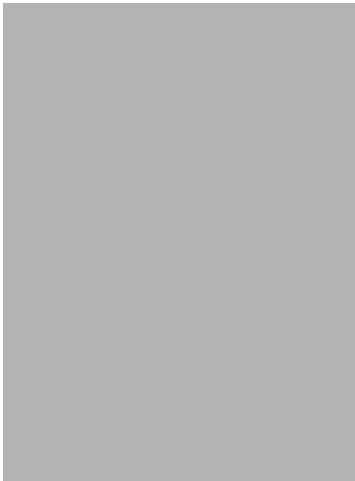
1. Getting started:
 - a. In Eclipse SE Administration, click the **Case Management** tab.
 - b. In the navigation panel, expand the **Reports** menu and click **Shortcut Keys Report**.
2. In the configuration area, select the needed client and case. The report generates automatically. Details include the following:
 - Names of tags for which shortcut keys have been assigned and the shortcut key assignments.
 - Names of coding forms containing shortcut keys for fields.
 - Names of fields for which shortcut keys have been assigned and the shortcut key assignments.
3. View and navigate through the report. Tips:
 - Maximize the window.
 - Use the simple page navigation buttons and the scroll bars to view all pages and report details.
4. Optional: Copy some or all rows on a page and paste them into a spreadsheet, word processing, or other appropriate file. To do so, use common mouse and keyboard commands to select, copy, and paste report content.
5. Optional: To export report contents to a .CSV file:
 - a. Click **Export to CSV**.
 - b. Complete the Save As dialog box and click **Save**.
 - c. In response to the success message, click **OK**.
 - d. Open or import the file into an appropriate spreadsheet program.
6. When finished, select another report or administrative action.

Using Case Management Reports


About Case Management Reports

Eclipse SE Case Management includes reports to assist you in the evaluation of case details. Available on the Case Management **Reports** tab are the following reports:

Case Management Reports



Report	Description
Gaps Report	<p>This report identifies missing pages, that is, breaks in the numbering sequence of image keys (defined in the BEGDOC field) for a particular case. For example, if ECL000009 is a single-page document and the next document in the case is ECL000012, a gap exists. This gap would be part of a report similar to the one shown here.</p> <p>Optionally, the Gaps Report can include a list of the major image key groupings (document ranges, as indicated by image key prefixes). For example, this report shows that image keys beginning with both "ECL" and "XYZ" exist in the selected case.</p> 
Volume Path Report	This report lists volumes defined for the case, including the volume names and respective paths.

Case Management Reports (Continued)

Report	Description
Duplicates Report	<p>Similar to the Tally function in Eclipse SE Desktop, this report identifies the number of occurrences of the values in a selected field. The Duplicates Report lists only field values that occur more than once, however.</p> <p>This report is usually run against a field that is <i>expected</i> to have unique values, thus the report identifies exceptions.</p> <p>Fields that will be available for this report include:</p> <ul style="list-style-type: none"> • Any field defined with the Sort Key or Category flag • Any NUMERIC field • Any of the following fields: <ul style="list-style-type: none"> - BEGATTACH - BEGDOC - DOCKEY - _DOCID <p>The report includes each value that exists and the number of duplicate entries.</p> <p>For example, the report shown here was generated for the "Application Name" field and shows that "microsoft powerpoint" has three duplicate entries (four total instances).</p> 
Broken File Links Report	<p>This report lists all image and native files that do not exist at the location indicated in the case.</p>

Generating Case Management Reports

Review "[About Case Management Reports](#)" on page 15-32, then produce a report as follows:

1. In Eclipse SE Administration, and click the **Case Management** tab.
2. In the navigation panel, expand the **Client/Case Management** menu and click **Case Management**.
3. In the Case Management workspace, click the **Reports** tab.
4. On the left side of the workspace, select the client and case of interest.
5. **Maximum Report Lines:** If the report might include a significant number of results (such as greater than 1,000), select the maximum number of results to be included. Limiting the number of lines will allow the report to generate more quickly and may still provide the details needed.
6. Create the needed report:
 - **Gaps Report:** If desired, select the **Include Ranges** option, then click the **Gaps Report** button.
 - **Volume Path Report:** Click the corresponding button.
 - **Duplicates Report:** Select a field of interest, then click the **Duplicates Report** button.
 - **Broken File Links:** Click the corresponding button.
7. Evaluate the report data in the **Reports** tab. Go to step 6 or 7 to save or print the report.
8. To save the report to a plain text file, click  on the right side of the **Reports** tab and complete the Save As dialog box.
9. To print the report to a plain text file. click  on the right side of the **Reports** tab and complete the Print dialog box.

16 Producing Documents

In this Chapter

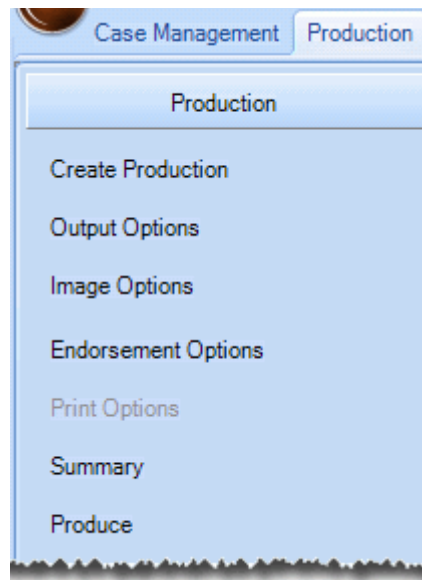
Overview	16-1
About Document Production	16-1
Privileges Required	16-2
Before You Begin	16-2
Creating a New Production Job	16-4
Getting Started with Production	16-4
Selecting the Production Set	16-4
Addressing Production Shield Issues.....	16-8
Selecting Output Options	16-10
Selecting Image Options.....	16-25
Selecting Endorsement Options	16-30
Selecting Print Options	16-44
Reviewing Production Settings.....	16-47
Completing Production	16-48
Using a Production Template	16-52
Working with Saved Production Settings	16-53
Overview.....	16-53
Creating a Production Job from Saved Settings	16-53
Deleting Saved Production Settings.....	16-54

Overview

About Document Production

Eclipse SE Administration allows you to create a production data set from selected data in your database. The production output can be in a variety of formats, including TIFF, PDF, native files, and page OCR, based on the files defined in your database (that is, if you do not have native files in your case, native files will not be produced). Printed output is also an option.

A range of output options allows you to customize the output to meet your needs, and detailed summary and history records are maintained for administrative purposes. You can also save production settings in templates, making it easy to define production jobs and maintain consistency between jobs. The following figure shows the main production menu.



Production Menu

Privileges Required


By default, you must have Super or Case Administrator rights to produce a case. This requirement may differ if the Super Administrator modifies privileges for a particular user or group.

Before You Begin

Basic preparation

Prepare for production with the following actions:

- **Production Shield:** Ipro Production Shield adds a layer of protection for documents that should not be produced. A saved search is selected in Production Shield; documents meeting the search criteria (and optionally document families) will not be producible. To configure Production Shield, see "[Configuring Ipro Production Shield](#)" on page 6-21.
- **Review completion:** In most cases, the document review process should be completed before you produce a document set. Documents should be tagged, redacted, and annotated so that you will be able to create appropriate production set(s) as required by the requesting organization (such as an internal department, opposing counsel, or a government agency).

- **Production planning:**
 - Identify which documents are to be produced—whether it is an entire case, a subset, or specific documents. Identify them by image key (BEG-DOC field) before you begin.
 - You should also determine what types of files should be produced. Eclipse SE offers several options, which you can learn about by completing "[Production process introduction](#)" on page 16-3.
-  **NOTE:** If a production template exists that matches some or all of the production settings needed, identify the template to be used.
- **Database backup:** Before running a production, it is recommended that you back up your database to preserve a snapshot the production.

Production process introduction

As with other Eclipse SE activities, planning for production will allow you to produce needed document sets as efficiently and accurately as possible. It may be useful to “walk through” the steps involved in producing a case to familiarize yourself with the options available. To do so:

1. Start Eclipse SE Administration and log in as a user who has the appropriate administrative rights (by default, Super or Case Administrator).
2. Click the **Production** tab.
3. In the Production navigation panel, click **Create Production**, and in the Select Production Set workspace, select the case to be produced.
4. In the **Selected Documents** section of the workspace, note the available options. For the purposes of this walk-through, simply select/enter a maximum number of documents on the **Select Range of Documents** tab and click **Use Range for Production**.
5. Click the following items in the navigation panel to explore the remaining production options:
 - **Output Options**
 - **Image Options**
 - **Endorsement Options**
 - **Print Options** (must select print output to see this option)
6. Make a note of items to plan or include in your production job.
7. In the navigation panel, click **Summary**. Note that you will be able to preview pages, review your settings, and save the settings as needed.

8. In the navigation panel, click **Produce**. Note that the start of the job can be delayed if needed and production numbering options selected. For the purposes of your walk-through, do not start production.
9. When you have finished reviewing the settings and options available for case production, gather information you need for the case, then proceed with the procedures in this chapter.

Creating a New Production Job


Getting Started with Production

After completing preparation (see ["Before You Begin"](#) on page 16-2), start the procedure as follows. If a production template exists that can be used, skip to ["Using a Production Template"](#) on page 16-52.

1. In Eclipse SE Administration, click the **Production** tab.
2. Continue with procedures explained in this section, starting with ["Selecting the Production Set"](#) below.

Selecting the Production Set

To select the documents to be included in the production set:

1. Complete ["Getting Started with Production"](#) on page 16-4.
2. Click **Create Production** in the Production navigation panel.
3. In the **Select Case** list, click the name of the case containing the documents to be produced. Note:
 - If needed, click the **Refresh** button to update the list.
 - To find a case in a long list of cases, enter the case name or the beginning of its name in the **Case Name** field at the bottom of the list and press Enter or click . Eclipse SE will highlight the first case matching your entry.



NOTE: Production images (the images, annotations, and other aspects of the case, such as redaction color) will match those of the case when it is first selected.

If any changes occur in the case after it is selected for production and you want those changes reflected in the production job, select a different case, then re-select the case to be produced. Production settings made to that point will remain in effect.

4. If you will be producing load files and want the data sorted in a specific way, select up to three fields for sorting and the sort order (ascending or descending). The example above shows that load file data will be sorted first by author, then by the creation date.

Author	Ascending
Creation Date	Ascending
<none>	Ascending

5. To include related documents in the production set, select **Include Family Relationships**.



NOTE: If you are producing load files with a particular sort order, parent documents will be sorted and related documents will be listed after the parent, in order by the sort field(s).

6. Select the needed documents using one of the following methods:
- ["Select documents by searching"](#) on page 16-5
 - ["Select a range of documents"](#) on page 16-6

Select documents by searching

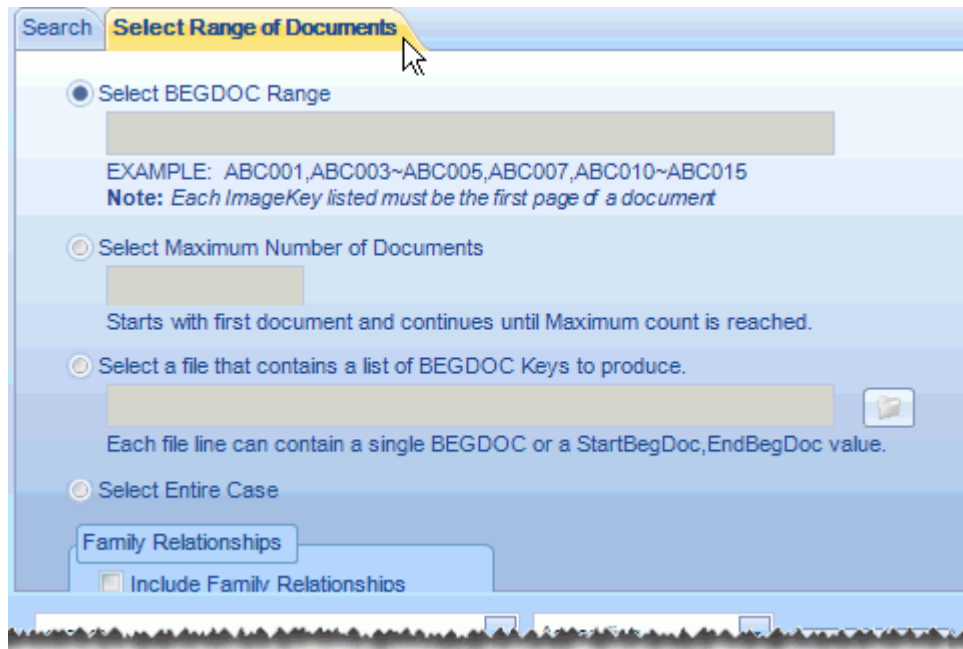
To search for and select the documents for the production set:

1. In the **Select Documents** area of the Select Production Set workspace, click the **Search** tab.
2. Click the **Execute Search** button to open the Advanced Search dialog box.
3. Define and run the search. For details on searching, see the *Ipro Eclipse SE Search Reference*.
4. Depending on what occurs, complete one of the following steps:
 - If Production Shield is configured and you receive a message regarding Production Shield conflicts, go to ["Addressing Production Shield Issues"](#) on page 16-8.
 - If you do not receive an error message, then either Production Shield is not configured or there are no conflicts. The number of documents found will display in the lower right corner of the **Search** tab; continue with [step 5](#).
5. Click **Use Search**, then go to ["Selecting Output Options"](#) on page 16-10.

Select a range of documents


To select the range of documents to be included in the production set:

1. In the **Select Documents** area of the Select Production Set workspace, click the **Select Range of Documents** tab, shown in the following figure.




Selecting Documents for Production

2. Complete step 3, 4, 5, or 6 to select the documents to be produced.
3. To specify a range of image keys:
 - a. Click **Select BEGDOC Range**.
 - b. In the corresponding field, enter needed image keys (those for the first page of each needed document).
Use a tilde (~) to indicate a range and a comma (,) to separate individual documents as shown in the example on the tab.
 - c. Skip to step [step 7](#).

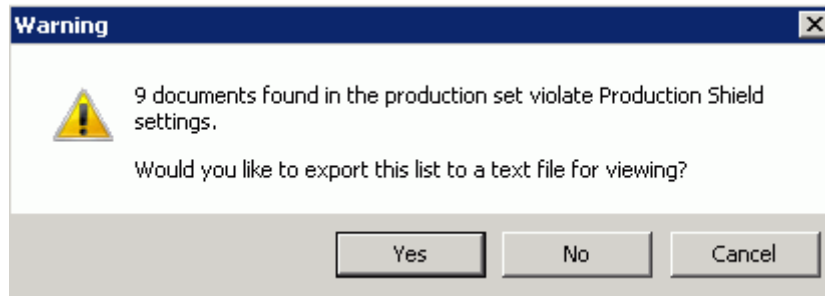
4. To specify a maximum number of documents (beginning with the first document in the case):
 - a. Click **Select Maximum Number of Documents**.
 - b. Enter the desired maximum number. This is the total number of documents, not pages. (If you enter 100, for example, and each document has 10 pages, then the total production will be 1,000).
 - c. Skip to [step 7](#).
5. To use a plain text (.TXT) file containing needed image keys:
 - a. Click **Select a file that contains a list of BEGDOC keys to produce**.
 - b. Type the full path and filename of the file to be used or click  to select the file, then click **OK**.
 The file should include one image key per line and/or one range of image keys per line. Indicate a range with a comma. For example, consider a set of single-page documents beginning with image key ABC-001. To produce the first two documents along with documents 100 through 300, the file would include the lines shown in this figure.

ABC-001
ABC-002
ABC-100 ,ABC-300
 - c. Skip to [step 7](#).
6. To produce all documents in case: Click **Select Entire Case**.

 **NOTE:** Producing an entire case may take significant time, depending on your system resources and case size. Plan such a production accordingly, such as during off-hours.
7. To include documents related to the set of production documents, select **Include Family Relationships**.
8. When the document range is specified, click **Use Range for Production**,
9. Depending on what occurs, complete one of the following steps:
 - If Production Shield is configured and you receive a message regarding Production Shield conflicts, go to "[Addressing Production Shield Issues](#)," next.
 - If you do not receive an error message, then either Production Shield is not configured or there are no conflicts – continue with "[Selecting Output Options](#)" on page 16-10.


Addressing Production Shield Issues

After selecting documents as described in the previous procedures, if Production Shield is configured and any of the documents in the set of documents you have selected are protected by Production Shield, you will receive an error message similar to the following:

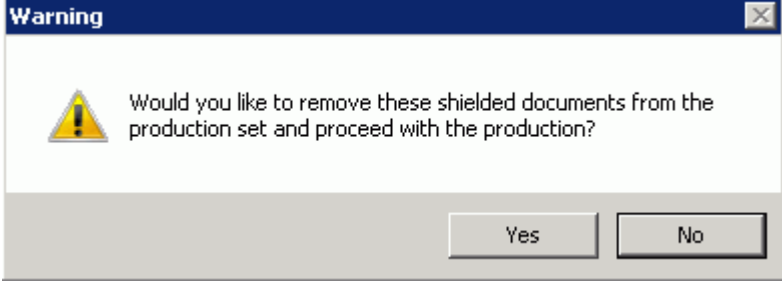


Click one of the message buttons as described in the following table:

Production Shield Responses

Click...	Description
<p>Cancel</p>	<p>Clicking Cancel ends the Production Shield evaluation and allows you to select different documents for the production (a different search or range of documents).</p> <p>Alternatively, you might check the Production Shield tab in Case Management to see what criteria are being used and then:</p> <ul style="list-style-type: none"> • return to Production and select documents that will not meet the search criteria, or • change the Production Shield search criteria. <p> IMPORTANT! Do not change the search criteria unless you are certain that a different search will protect the right documents.</p> <p>If you do change the search criteria, log out of Eclipse SE Administration, then log back in to ensure the changes are reflected in Production.</p>

Production Shield Responses (Continued)

Click...	Description
<p>No</p>	<p>Clicking No allows you to remove the shielded documents and continue with production. The following message appears after you click No.</p>  <p>The image shows a Windows-style warning dialog box with a blue title bar labeled 'Warning'. Inside the dialog, there is a yellow warning triangle icon on the left and the text 'Would you like to remove these shielded documents from the production set and proceed with the production?' on the right. At the bottom of the dialog, there are two buttons: 'Yes' and 'No'.</p> <ul style="list-style-type: none"> • Click Yes to continue the production; go to "Selecting Output Options" on page 16-10. • If you click No here, perform the actions described for the Cancel button above.
<p>Yes</p>	<p>Clicking Yes allows you to review a list of protected documents:</p> <ol style="list-style-type: none"> 1. Click Yes and save a text file containing the list. 2. Open the file and review the protected documents. 3. Return to Eclipse SE Administration and click Yes or No to the waiting message (see previous figure), depending on your review. 4. Take one of the following actions: <ul style="list-style-type: none"> - If you click Yes here to continue the production, go to "Selecting Output Options" on page 16-10. - If you click No here, perform the actions described for the Cancel button above.

Selecting Output Options

Once the document set is specified, select output options described in the following sections and primarily in the order presented here.

- ["Define output type and output folders"](#) on page 16-10
- ["Define file names"](#) on page 16-13
- ["Define output options"](#) on page 16-19
- ["Select metadata for load files"](#) on page 16-22

Define output type and output folders

Complete the following steps to define production output basics.

1. If the Output Options workspace does not appear after you select a document set, click **Output Options** in the Production navigation panel.
2. **Primary output type:** In the **Output Type** section of the workspace, select one of the following:
 - **Native Only:** Produce native files from your case. See **Native Files** option in step 3, too.
 - **Images:** Produce image files from your case.
 - **PDF:** Produce PDF files (based on image files). If you want PDF files that can be searched in Adobe Reader or other PDF viewer, also select the **Searchable** option.
 - **Print:** Produce paper output

If you select the **Print** option, skip to ["Define output options"](#) on page 16-19.

3. **Secondary output type:** Select additional output formats as described in the following table.

Secondary Output Types

Include...	Description
Native Files^{a, b}	Select this option to include native files (if they are part of the case). Note: If you select Native Only as your primary output this option will be automatically selected.
Page OCR^a	Select this option to produce editable text (.TXT files) (from EXTRACTEDTEXT field or existing .TXT files).
Word Coordinates	Applies to .DLF and .LFP files. If word coordinates currently exist for the case, select this option to include them in .DLF and/or .LFP files (which you select separately).

- a Additional options for these file types are described in ["Select OCR and native file options"](#) on page 16-15.
- b If a NATIVE field is not defined for the case, this option will not be available. If the field is defined, selecting the option allows existing native files to be included with the production.

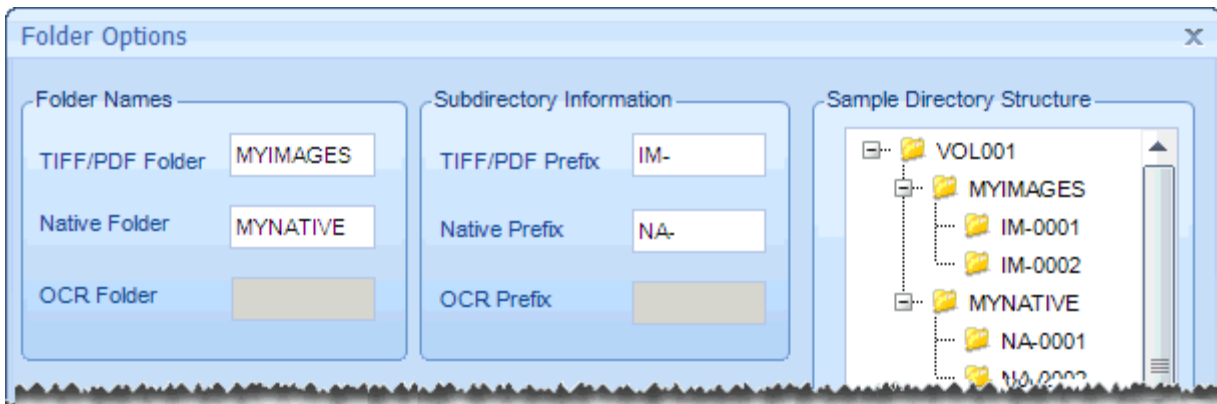
4. To remove or include pages based on certain page tags:
 - a. Click **Page-Level Exclusions**.
 - b. In the needed area of the dialog box (**Page-level Exclusions** or **Page-level Inclusions**), expand the tag group containing the tag(s) upon which pages should be excluded or included.
 - c. Select the page tag and click the applicable **Add Selected Tag** button (add to **Exclusion List** or add to **Inclusion List**).
 - d. Repeat these steps to exclude or include pages based on other tags.
 - e. When all tags have been selected, click **Done**.
5. Click **Folder Options** to define how files will be organized in folders. By default, files are organized by type in separate folders based on the output you have selected in the previous steps. These folders will reside in volume folders. See ["Define output options"](#) on page 16-19 for details on defining volumes.
6. If needed, change default entries in the **Folder Names** area and/or **Subdirectory Information** area.



NOTES:

- To avoid the risk of overwriting files, use unique folder names. Using a single folder name will place all file types in a single folder.
- If you enter custom names in the previous steps, avoid characters that are not allowed in Microsoft Windows, such as backslash, colon, and so forth.

7. Evaluate the names and organization in the **Sample Directory Structure** area.



Production Folder Options

8. **Options:** Make other changes in the Folder Options dialog box as described in the following table.

Option	Description
Files per Directory	When any folder type (TIFF, Native, etc.) reaches the specified number of files, a new subfolder is created. Documents are not split across folders, however.
Starting Number	The number to be used for the first subdirectory in each file-type folder. In the previous figure the starting number is 1.
# of Digits	The number of digits to be used in subdirectory names. It is generally recommended that at least four digits be used; up to ten digits may be used (that is, numbers such as 0000000001).

9. Review your folder definition in the **Sample Directory Structure** area. Make changes if needed.
10. When the folder definition is as needed, click **OK**.
11. Continue with "[Define file names](#)" on page 16-13.

Define file names

This procedure defines file names for images or PDF files, and text files if you are producing them. Skip this procedure if you are producing only printed output, only native files (**Native Only** option), and/or you want to accept all default file naming options.

To define file names for production files:

1. If needed, click **Output Options** in the Production navigation panel.
2. In the Output Options workspace's **File Naming Options** area, select the needed naming convention choices, listed in the following table.

Production File Naming Options

Option	Description
Use Production Image Key as Filename	File names will be based on the image keys defined in the Image Keys tab of the Endorsement Options workspace. See " Selecting Endorsement Options " on page 16-30 for details. See also the delimiter option at the end of this table.
Use Original File Name	File names in the production set will be match those defined in the case. See also the delimiter option at the end of this table.
Use Sequential Numbering	Consecutive numbering will be used. As needed, define the number format as follows: <ul style="list-style-type: none"> • Prefix: Optional. If needed, enter a prefix to precede the sequential number. • Delimiter: Optional. If needed, select a different delimiter or enter a delimiter of your choice. Characters must be Windows compliant.^a • Number: If needed, modify the number format or starting number.

Production File Naming Options (Continued)

Option	Description
Select Filename from Database	<p>File names will be based on the content of a specific field in your database. For example, if you select a field containing authors' names, file names will begin with each author's name. Components include:</p> <ul style="list-style-type: none"> • Prefix: Select the needed database field. • Delimiter: Optional. If needed, select a different delimiter or enter a delimiter of your choice. Characters must be Windows compliant.^a • Number: If needed, modify the number format or starting number.
Remove Delimiters from File Name	<p>If the production image keys or original files names option is selected and these names include delimiters, select this option to remove the delimiter from the production file names.</p> <p>For example, if original file names will be used and are in the format "ABC-00001," selecting this option will result in production file names in the format "ABC00001."</p>


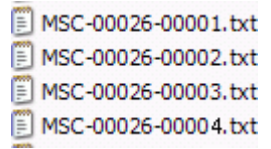
a The following characters cannot be used: / ? < > \ : * |

3. If you are producing full text (OCR) and/or native files, continue with ["Select OCR and native file options"](#) on page 16-15. If not, skip to ["Define output options"](#) on page 16-19.

Select OCR and native file options

If you are producing OCR and/or native files, complete the following steps to select related options.

1. If needed, click **Output Options** in the Production navigation panel. Complete the following steps as applicable to the output type you have chosen.
2. **OCR Options:** Select from the following options.

Option	Description
OCR Document if OCR Does not Exist	<p>If an OCR (plain text) file does not exist, it will be created based on a scan of the image file(s).</p> <p> NOTE: If you want to re-OCR only the documents/pages containing redacted or excluded content, do <i>not</i> select this option. Instead, select Remove Redacted/Excluded Pages/Areas Only (see step 3).</p>
Create Document OCR	<p>Create one OCR file containing all pages in each document for which an OCR file does not already exist.</p>
Languages	<p>To create OCR in a language other than English, click this button and select needed language(s).</p>
Create Page-Level OCR	<p>Create separate OCR files for pages in each document for which an OCR file does not already exist.</p>
Use Page Number for Multi-Page File Naming	<p>If the Create Page-Level OCR option is selected, this option will cause full-text files to be named with the document name and the page number as a suffix. (The document name will be as specified in step 2.)</p> <p>For example, for a sequentially-numbered document with four pages, full-text files would be named similar to those shown here.</p> <div data-bbox="1182 1430 1451 1577" style="border: 1px solid #ccc; padding: 5px;">  </div>
Encoding	<p>If you are producing load files, select encoding needed for your OCR output. Encoding is included in the Metadata for Load Files section as described on page 16-24.</p>

3. **Redaction/Exclusion Options:** Select how redacted content and pages excluded based on tagging will be treated in OCR files:

Option	Description
Remove Redacted/ Excluded Pages/ Areas Only	Documents containing redacted content and/or excluded pages ^a will be re-OCR'ed so that such content/pages are omitted from the OCR files.
Replace Entire OCR/ Extracted Text with Placeholder	Text files will be created and contain only the information you enter in the Contents field.
Contents	If you use a placeholder for redacted documents (previous option), the text file will contain only the information entered in this field.
Skip Entire Document if any page is Redaction or Excluded	No text file or image will be produced if any page in the document includes a redaction(s) or has been excluded. ^a

a Pages may be excluded based on tags. These settings are made in the **Output Type** section of the Output Options workspace (**Page-Level Exclusions** button).

4. **Native File Options:** In this area of the Output Options workspace, make needed choices for the production of native files:


Option	Description
Exclude Native if page is Redacted/ Excluded	Do not produce native files for documents that include redactions or pages that have been excluded ^a .
Advanced Native File Options	Click this button to select any of the following options: <ul style="list-style-type: none"> • File name options • File type options • Placeholder options See steps 5, 6, and/or 7 for details on these options.

a Pages may be excluded based on tags. These settings are made in the **Output Type** section of the Output Options workspace (**Page-Level Exclusions** button).

5. **File Names:** To specify the naming convention for native files:
 - a. Click the **Advanced Native File Options** button.
 - b. On the **File Name Options** tab, select the needed naming option:

Option	Description
Use Production Key for Native Files	Name native files with the image name ^a and the native file extension. Example: PROD-0001.msg
Append Original File Names to Production Key	Add the native file's original name at the end of the image name ^a . Example: PROD-0001-ABC-0001.msg
Append Original File plus Message to Production Key	Add the native file's original name plus custom text at the end of the image name ^a Example: PROD-0001-ABC-0001.msg-MESSAGE
Append Original File plus TAG to Production Key	Add the native file's original name plus a selected tag name at the end of the image name ^a . Example: PROD-0001-ABC-0001.msg-TAGNAME

- a. The image name is defined in "[Selecting Endorsement Options](#)" on page [16-30](#).
 - c. To limit the types of files to be produced, go to the next step. Otherwise, click **OK** and go to [step 7](#).
6. **File Types:** To select specific native file types to be produced:
 - a. Click the **Advanced Native File Options** button and then the **Select File Types** tab.
 - b. Select the **Produce Specific Native Files Types** option.
 - c. Choose the needed file types from the list.
 - d. If a needed native file type is not listed, enter the extension in the **Custom** field and click **Add**.
 - e. To use a "placeholder" image for some native file types, go to the next step. Otherwise, click **OK** and go to [step 8](#).

7. **Placeholder Images:** To use a blank page or an image file (such as .JPG, .BMP, or .GIF) in place of specific types of native files:
 - a. Click the **Advanced Native File Options** button and then the **Placeholder Images** tab.
 - b. Click **Add** and enter the extension of the file type for which a placeholder will be used.
 - c. To replace the file with a blank page, click **Use Default Image** and skip to step f.
 - d. To replace the file with an image file, click **Use Custom Image**.
 - e. Enter the full path (including file name) for the placeholder image. Or, click  and navigate to the needed file.
 - f. If you are producing images (or PDF) files plus native files, select from the following options.

Option	For the Specified File Type...
Native File Only	Create placeholders for native files only (produce images for these files). Placeholders will be placed in the native folder.
Both Native and Image Files	Create placeholders for both images and native files (do not produce either). Placeholders will be placed in both the images and the native folders.
Image File Only	Create placeholders for images only (produce the native files for this file type). Placeholders will be placed in the images folder.



- g. Click **OK**.
 - h. Repeat steps b - g for each file type for which a placeholder will be used.
 - i. When finished, click **OK** in the Native File Options dialog box.
8. Continue with "[Define output options](#)" on page [16-19](#).

Define output options


Complete the following steps to specify details for the production job itself.

1. If needed, click **Output Options** in the Production navigation panel.
2. In the Output Options workspace's **Output Options** area, select the needed naming convention from the following choices.

Production Output Options

Option	Description
Production Name	Enter a name for this set of production instructions. Used for tracking purposes and listed in the Production History tab.
Production Volume Prefix	<p>Enter a name for the root directory (top-level folder) for the production results. The name displays to the right of the definition.</p> <ul style="list-style-type: none"> • Prefix: Enter a "base" name for volumes.^a • Starting Index: The beginning number for a set of volumes for a particular production set. Multiple volumes are created when the Max Volume Size is exceeded. • Width: Enter the number of digits to be used in the index number. <p>For example entries of "DANBY," "1," and "3" will result in volumes named as DANBY001, DANBYD002, and so on.</p>
Output Directory	Enter the full path of the folder in which production results will be placed, or click  to navigate to the folder. A folder must be selected, not a drive.
Error Log Location	By default, error logs are placed in the output directory. If needed, change the location; enter the full path of the preferred folder, or click  to navigate to the folder. A folder must be selected, not a drive.

Production Output Options (Continued)

Option	Description
Max Volume Size	Select from a list of common media capacities or enter another maximum size in megabytes. When the maximum size is reached, a new volume folder is created.
Create Images if They do not Exist	<p>This option is available for Images, PDF, or Print output. Select it if image files do not exist for some of the documents being produced (but native files do) and you want to include the files.</p> <p>When this option is selected, image files (TIFFs) will be created based on the native files and used as follows:</p> <ul style="list-style-type: none"> • For image output, the TIFF files will be included in the production set (and/or .JPG images if the Produce Color Images as JPEG option is selected in Image Options).^b • For PDF or print output, the image files will be the basis of the produced PDF or printed output. Image files created for this purpose are temporary unless the following option is selected. • Additional options are enabled when this option is selected, as described later in this table. <p> NOTE: In the rare case that image files do not exist for <i>any</i> of the documents being produced, this option is selected by default.</p> <p>However, if you have a case with a significant number of documents lacking image files (because they were added through native ingestion), it is recommended that you create the images as explained in "Creating Multiple Document Images (Bulk TIFF)" on page 9-22, then run the production.</p>

Production Output Options (Continued)

Option	Description
Add Created Images to the Case	<p>If the Create Images if They do not Exist option is selected, choose this option to have the image files created for production added to the case.</p> <p>Images will be placed in a subdirectory in the Images folder in the case directory; document image paths will be defined accordingly. In addition, the IMAGECNT field will be updated to reflect the correct number of pages for each document.</p> <p>These images will be viewable in Eclipse SE Desktop on the Image tab.</p>
Create Color Images	<p>If the Create Images if They do not Exist option is selected, choose this option to create color images (when native files are in color). To create black and white images, do not select this option.</p> <p>Color images will be TIFF images unless the Produce Color Images as JPEG option is selected for your primary output (in which case .JPG images will be added to the case).^b</p>




a The following characters cannot be used: / ? < > \ : * |

b See page [16-25](#).

- Continue with "[Select metadata for load files](#)" on page [16-22](#). If you are not producing load files, go to "[Selecting Image Options](#)" on page [16-25](#).

Select metadata for load files

Complete the following steps to select the types of load file you want to produce and the load file contents. Load files are placed in the root of the production folder.

1. If needed, click **Output Options** in the Production navigation panel.
2. Select the type(s) of load file to be produced, then complete the following steps as applicable to selected file types.
3. **Fields** – The following production fields will be included by default in selected load files (as applicable), unless you remove them using the following steps: PROD_BEGDOC, PROD_ENDDOC, PROD_BEGATTACH, PROD_ENDATTACH.
 - a. To include all field data from the Eclipse SE database, click the **Select All>>** button under the left column of field names.
 - b. To include some data from the Eclipse SE database, click the individual field names in the left column and then click . Use Shift+click to select a contiguous set of field names or Ctrl+click to select a non-contiguous set of field names. See the note below.
 - c. In the list of selected fields (right column), rearrange the order of the data by selecting a field to be moved, then using the  or  buttons.



NOTES:

- If you are creating .CSV, .DAT, and/or .DLF load files AND you want to renumber image keys (as explained on page 16-33), make sure that you:
 - Select (**PROD_BEGDOC**) and (**PROD_ENDDOC**).
 - Do *not* include the original image key field.
- If your case includes production attachment fields (that is, fields containing the production beginning- and ending-image keys of associated attachments), they can be selected here, but they will *not* be included in your final load files due to Eclipse SE production methodology.

Instead, the PRODKEYS.TXT file is created that includes the following field data:

 - Production beginning and ending image keys
 - Production attachments beginning and ending image keys

4. **Advanced options** – applies only to .DLF and .LFP files:
 - a. Click **Advanced**.
 - b. Select the tags to be included in the load file(s).
 - c. Select how tags should be treated:



- d. Select the annotations to be included in the load file(s).
 - e. Click **OK**.
5. **File Paths** – applies to all file types:

Select the way in which the path for produced files (your primary output files) will be defined in the load files you produce. In the following table, the examples refer to the following path. In this path, *vol001* is the production volume name:

\\server001\cases\smith-jones\production\vol001\images

Production File Path Examples

Option	Description	Example
Relative	Replace path details preceding the production volume name with an at sign, @. If needed, select the Include Volume Name option.	@vol001\images\
Include Volume Name	Include the volume name in the file path. Choosing this option results in the correct syntax for specifying volumes in the load files, particularly in .DLF and .LFP files.	Same as above (with additional syntax for volumes).
Absolute	Include the complete path of the file.	\\server001\cases\smith-jones\production\vol001\images\

Production File Path Examples (Continued)

Option	Description	Example
Custom Prefix	Replace path details, including volume name, with a different path. For example, to replace the production path with drive E, enter E:\ in the Custom Prefix field.	E:\images\

6. **Encoding** – applies to all file types except .LFP:

Select the character set to be used. Common encodings are available for selection. Make sure the encoding selection is appropriate for the type of load file(s) you have selected. (For example, .DAT files should have only ASCII or Unicode encoding, as supported by Concordance.)



NOTE: The encoding setting applies to OCR and/or load file output.

7. When load file selections are completed, continue with "[Selecting Image Options](#)," next.

Selecting Image Options

Once output options are selected, choose desired options on the **Image Options** tab. This tab includes options for all output types.

Define image settings

Complete the following steps to define image type, color, and related options.

1. Click **Image Options** in the Production navigation panel.
2. Complete the **Image Settings** area of the workspace. Details are listed in the following table.

Production Image Options

Option	Description
Select Image Type	<p>If the primary output type is TIFF or PDF, select between these options:</p> <ul style="list-style-type: none"> • Single-page TIFF or PDF: Create a separate file for each page of a document. If you will be producing color single-page TIFF files, you have the option to produce color images as JPEG files. To do so, select the Produce Color Images as JPEG option. With this option selected, black and white images will be produced as .TIF files and color images will be produced as .JPGs. Some administrators find different file extensions useful when working in the file system. • Multi-page TIFF or PDF: Create one file, with multiple pages, for each document.
DPI	<p>If the primary output type is TIFF or PDF, select from several common DPI (dots per inch) settings. The higher the DPI, the higher the quality of the image (also, the larger the file size).</p> <p>The "Max" options will limit the number of dots per inch to the specified number, even if the original image contained a higher DPI.</p>

Production Image Options (Continued)

Option	Description
Color Options	<p>For all primary output types, select the color to be used in output files. If you are running a print production, the selection made here will be used to the extent supported by the printer.</p> <ul style="list-style-type: none"> • Keep Original Color: Maintain original document colors. <ul style="list-style-type: none"> - Force to Color if Image has Color Annotations or Redactions: For black and white documents, select this option to save files with color information for color annotations/redactions. • Force All Images to Color: Whether or not documents have color, files will be saved with color information. <ul style="list-style-type: none"> - Color Quality: Select from common color qualities ranging from 24-bit (virtually unlimited number of colors, largest file size) to 8-bit grayscale (256 shades of gray, smallest file size). • Force All Images to Black and White: Color information will not be maintained. <ul style="list-style-type: none"> - Dither Color Images: When using only black and white, select this option to better approximate the colors in files through pixel adjustments. Results depend on original color depth and patterns in the file. Dithering may significantly increase file size.

3. Continue with "[Define page attributes](#)," next.

Define page attributes

Complete the following steps to select paper size and related options for all output types.

1. If needed, click **Image Options** in the Production navigation panel.
2. Complete the **Page Size and Scaling** area of the workspace. Options will vary, depending on primary output type (images, PDF, native files, or print). See the following table for option details.

Option	Description
Page Scaling	Select a method for sizing the image on the page: <ul style="list-style-type: none"> • Use paper size: Scale image to fit the selected paper size. • Append to original: Adds to the selected paper size to accommodate header and footer content. Think of it as taping strips of paper to the top and bottom of a page to add the headers and footers. For example, if your header and footer are 0.5 inch each and you are using letter-size paper, your output image would be 8.5 x 12 inches instead of 8.5 x 11. • Determine page size: For each image, the page size that will give the best result for the image will be used.
Paper size	Choose from common paper sizes. Note: If you are producing a print job and you use a paper size different from the size specified here, Eclipse SE Administration will attempt to scale the image to the paper size specified for the printer.
Maximize Horizontal Scale	Select to have each image fill the page from left to right margin.
Center Small Images	Select to position small images in the center of the page instead of at the top left corner.
Apply View Rotation	If images have been rotated in Eclipse SE Desktop (a setting on the Image tab), selecting this option for your production job will cause the rotation setting in the Desktop to be used for production.

3. **Image Clipping:** Clipping allows you to “erase” unneeded content along the edge of images. (For example, image files may have been created from three-hole punch pages that were photocopied—you can clip the three-hole punch area from the images.)

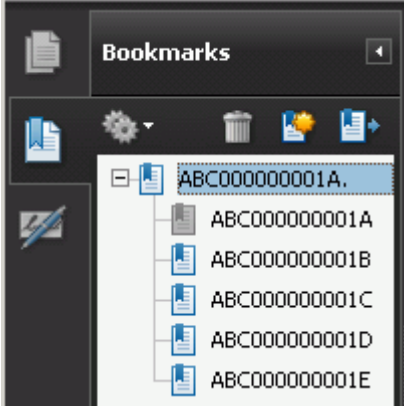
To clip images, enter the amount of the page to be clipped, in inches, in the appropriate field (**Top**, **Left**, **Bottom**, and/or **Right**). The amount specified is measured from the corresponding margin.

4. **Margins:** Enter in the **Top**, **Left**, **Bottom**, and **Right** fields, in inches.
5. If the primary output type is not PDF, skip to step [step 7](#). For PDF output, complete the next step.
6. **PDF Options:** The options in the following table are visible and apply only if the primary output type is PDF and **Image Type** is **Multi-page PDF**.

Production PDF Options

Option	Description
PDF Version	
Choose the desired PDF format. For details, see ISO portable document format standards. Briefly, choices include: <ul style="list-style-type: none"> • Standard PDF: Basic PDF format. • PDF/A 1-A: Complies with the ISO 19005-1 Level A standard, which ensures that document content can be searched and repurposed. • PDF/A 1-B: Complies with ISO 19005-1 Level B standard, which ensures dependable appearance of the document over time. 	
PDF Size Options	
Page Limit	Enter the maximum number of pages to be allowed in each PDF file. A default value of zero allows an unlimited number of pages per file.
Size Limit	Enter the maximum size, in megabytes, to be allowed for each PDF file. A default value of zero allows files of unlimited size.
Suffix PDF Name	For multi-page PDFs, if you enter a page limit, PDF files created as a result of the page limit will include a suffix to the document name. For example, MYDOC.pdf, MYDOCa.pdf, MYDOCaa.pdf, and so on.

Production PDF Options (Continued)

Option	Description
PDF Bookmark Options	
PDF bookmarks are links that appear in the Bookmarks panel of Adobe Reader or another PDF reader. Clicking a bookmark shows the corresponding image.	
Top-Level Bookmark	Include a bookmark at the document level; options include: <ul style="list-style-type: none"> • No Top-Level Bookmark • Use Production Image Key as Bookmark: The document's image key will be the bookmark name. • Select Bookmark Name from Database: Select a database field to be the bookmark name.
Page-Level Bookmark	When defined, page bookmarks will be subordinate to the top-level, as shown in this example. Choices for page bookmarks include: <ul style="list-style-type: none"> • No Page-Level Bookmark • Use Production Image Key as Bookmark: Page image keys will be the bookmark names. • Use Page Number as Bookmark: Page numbers as defined in the PDF file will be used for bookmarks. 
Open PDF with BookMarks expanded	When PDF files are first opened, bookmarks will be expanded in the bookmarks pane as shown in the previous figure. If this option is not selected, only top-level bookmarks will be visible.

7. When all image options are completed, continue with "[Selecting Endorsement Options](#)," next.

Selecting Endorsement Options

Eclipse SE Administration includes a wide variety of options regarding the information that can be included/added to the image file ("endorsements"). For example, the following figure shows a page with the confidentiality tag added to the header and the image key added to the footer.



NOTE: Endorsements are applied only to image files (whether they are the original image files, printed, or PDF'ed). Thus, if you selected the **Native Only** option as your primary output type, skip this section.

The general procedure for adding endorsements is as follows:

1. Click **Endorsement Options** on the Production navigation panel.
2. Select how annotations (redactions, comments, and so forth) should appear on your documents and/or pages. For details, see "[Annotation options](#)" on page [16-31](#).
3. If needed, add information to the header and/or footer areas of your documents and/or pages. Header/footer information is added to TIFF, PDF, and print output. You can add details to the left, center, and/or right portions of the header and/or footer areas. See notes on the following page and these topics:
 - a. Tags - see page [16-37](#).
 - b. Image keys (original or custom) - see page [16-33](#).
 - c. Data fields - see page [16-39](#).
 - d. Custom messages - see page [16-41](#).



NOTE: Regarding the endorsement areas in the header and footer:

- No specific character limit exists for endorsements, but practical limits do. Each area can display characters on one or more lines, depending on font selections, margins, image size, whether or not other areas include endorsements, and so forth.
- Large amounts of information may span areas that do not include endorsements, or wrap within a particular area when multiple areas include endorsements.
- If you have any questions about the suitability of your endorsement content, it is recommended that you preview one or more pages on the **Production Summary** tab as explained in "[Reviewing Production Settings](#)" on page 16-47.


Another option is to produce a test job with a small number of documents to see if your endorsements display/print as intended.

Annotation options


To define annotations to be included in the production job:

1. On the Endorsement Options workspace, complete the **Annotation Options** tab as needed. Options include:

Production Annotation Options

Option	Description
Redaction Categories	<p>Click Select All to choose all redactions, or select individual redactions to be included.</p> <p> NOTE: If a redaction is not included, the text beneath the redaction will be included in the image.</p>

Production Annotation Options (Continued)

Option	Description
Redaction Options	Select how redactions should be presented in produced files: <div data-bbox="776 533 1284 802" style="border: 1px solid #ccc; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">Redaction Options</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> As Is / Color <input type="radio"/> Black with White Font <input type="radio"/> White with Black Font <input type="radio"/> No Label/Black Redaction <input type="radio"/> No Label/White Redaction </div>
Selected Annotations	Select the annotations to be included in the image file: <ul style="list-style-type: none"> • Embedded Text • Highlight • Markups See note following this table.
Watermark	A watermark is an image that appears “behind” existing document content, similar to a stamp. To include a watermark: <ul style="list-style-type: none"> • Select the Use watermark option. • Click  and navigate to the watermark file. Common image file types can be used. See note following this table.



IMPORTANT: Highlights and watermarks may affect the accuracy/quality of OCR (if you will be creating OCR files during the production process).

If you need to include OCR in the production and also include highlights and/or a watermark, it is suggested that you OCR documents before production. See "[Creating OCR for Multiple Documents \(Bulk OCR\)](#)" on page 9-24" for details.

2. If you have not done so on one of the other endorsement tabs, in the **Image Mapping** area, select the type of **Page Layout**:
 - **Portrait**
 - **Landscape**
 - **Match Image Orientation**



NOTE: Ignore other aspects of the **Image Mapping** section for the **Annotation Options** tab.

3. Continue with other endorsement selections described in this section. If needed, edit endorsement selections as explained in "[Change endorsement settings](#)" on page 16-42.
 - If you are creating a print job, go to "[Selecting Print Options](#)" on page 16-44.
 - For other job types, go to "[Reviewing Production Settings](#)" on page 16-47.

Image keys

The production image key can be included in the header and/or footer of documents/pages.



NOTE: If you select other than original image keys in the following procedure and also select **Use Image Key as Filename** in **Output Options**, the image keys defined here will be used for file names (See "[Define file names](#)" on page 16-13.)

Other image key selections here do not affect file names.






To define image keys for the production job, complete the following steps.

1. On the Endorsement Options workspace, click the **Image Keys** tab select one of the options in the following table.


Production Image Key Endorsement Options

Option	Description
Use original image keys	Select this option to use the image key defined for the images as an endorsement.

Production Image Key Endorsement Options (Continued)

Option	Description
Renumber Image Keys	<p>Select this option to create a different image key for endorsement purposes and select the following components. See the note at the beginning of this topic regarding the relationship of this selection to file names.</p> <ul style="list-style-type: none"> • Prefix: Can be 50 characters maximum Characters must be Windows compliant.^a (If no prefix is specified, the delimiter will begin the image key.) • Delimiter (first delimiter): Select from common delimiters, no delimiter, or enter any character(s)* to separate the prefix from the document and/or page number. You may also type a space(s). • Document: Optional. To include document numbers, select this option. If desired, increase or decrease the number of digits by using the Width  or  buttons. Reducing the number of digits may limit the number of documents to be produced. • Delimiter (second delimiter): If you are using document numbers, select from common delimiters, no delimiter, or enter any character(s)* to separate the document number from the page number. You may also type a space(s). • Page: The page number will always be included. If desired, increase or decrease the number of digits by using the Width  or  buttons. Reducing the number of digits may limit the number of pages to be produced. <p> NOTE: If your case includes gaps in image key (BEGDOC) numbering, production image keys will not include the same gaps. The purpose of renumbering is to create a linear set of image keys without gaps. Refer to the production cross-reference file to compare original image keys with production image keys. See step 10 for details on this file.</p>

Production Image Key Endorsement Options (Continued)

Option	Description
Use Field Data for Image Key	<p>Select this option to use data from a specific field of your Eclipse SE database as the prefix for your image key, followed by delimiter and page number of your choosing. For this option:</p> <ul style="list-style-type: none"> • If needed, select a Delimiter and/or change the Width setting for page numbers as described for the previous option. • Select the way in which the production job will be handled if the field you select does not contain data for all records - see "If data is missing" at the end of this table. <p> IMPORTANT! If you select a field that contains duplicate information for different records, records may be overwritten. For this reason, it is recommended that you select only fields that have been defined with the Primary Key option.</p>
Use Produced Key	<p>Select this option if you are re-producing a subset of documents from an existing production set and need to maintain the numbering used in the original production job.</p> <p>In addition, select the production set the numbering should match and a method for handling missing production image keys - see "If data is missing" at the end of this table.</p>
If data is missing	<p>If you are using field data for production image keys or are using image keys from an existing production (one of the previous two numbering options), select the method for handling missing data:</p> <ul style="list-style-type: none"> • Skip and Log Error: Don't product images for which data is missing and log an error(s) in the production error log. The error(s) will also display in the Progress area of the Production workspace. • Cancel Processing: Stop the production job. Some documents may be produced but post-processing may be incomplete, so delete any documents produced.


a The following characters cannot be used: / ? < > \ : * |

2. Review your production image key definition in the **Selected image key** area. Ensure it appears as you intend.

If needed, click the arrow buttons to move through the image keys to be assured that numbering meets your requirements. If the production image key will be used in the document header or footer, continue with the following steps. If not, go to [step 5](#).

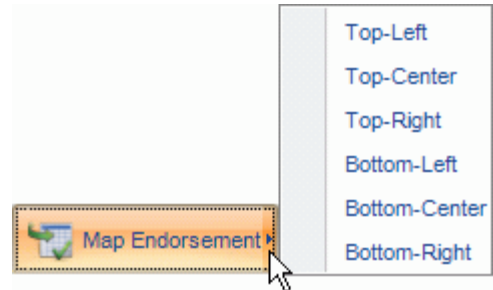
3. **Options:** Select from the options listed in the following table as needed.

Image Key Presentation Options

Option	Description
Font	Click to define font details (font, font size, style, color, and so forth).  NOTE: The exact font size may not display on this tab. For example, if you select a font size of 10 points, the tab may display 9.75 pt. Ignore this anomaly of system behavior.
Use bar code	Select this option if you want the defined number to be presented in bar code format. Invalid characters will be removed.
Include Page Position (1 of n)	This option is available if you do not choose bar codes. Choose this option to include page numbers with the image key, including both the current page number and the total number of pages, for example: <p style="text-align: center;">ABC-00033 (1 of 41)</p>
Apply to	Choose the pages on which the image key endorsement should be included: <ul style="list-style-type: none"> • All Pages: By default, the endorsement will be added to all pages. • 1st Page: Include endorsement only on the first page of each document. • Skip 1st Page: Include endorsement on all but the first page of each document.

4. After the image key format and options are selected, click the arrow on the right side of the **Map Endorsement** button and select the position for the image key, as shown in this figure.

Once a selection is made, the image key will display in the **Image Mapping** area of the workspace.



5. If you have not done so on another endorsement tab, in the **Image Mapping** area, select the type of page layout.
6. Continue with other endorsement selections described in this section. If needed, edit endorsement selections as explained in "[Change endorsement settings](#)" on page 16-42.
 - If you are creating a print job, go to "[Selecting Print Options](#)" on page 16-44.
 - For other job types, go to "[Reviewing Production Settings](#)" on page 16-47.

Tag options

Tag details can be included in the header and/or footer of document images, page images, or both. Tag names will appear on the images for which the selected tags were applied. If needed, text can be used in place of the tag name. To include tag details:

1. On the Endorsement Options workspace, click the **Tag Options** tab.
2. Complete the areas of the workspace as described in the following table.

Tag Endorsement Options

Area	Description
Tags	In the Tags area of the tab, select the Document , Page , or Both tab to locate needed tags. Next, select one or more tags that you want to appear in the <i>same</i> location on the page (such as top center). To include multiple tags in the same area, Shift+click to select a contiguous set of tags or Ctrl+click to select a non-contiguous set of tags, respectively. Or, click Select All to select all tags (be aware of size issues).

Tag Endorsement Options (Continued)

Area	Description
Selected Document Tag	<ul style="list-style-type: none"> • Selected tag: Each tag selected in the Tags area displays in this field. Multiple tags that have been selected are separated with a semi-colon. • Alternate text: Applies when a single tag is listed in the Selected tag field. To use text other than the tag name, enter it in the Alternate text field. For example, a tag name might be "ATTY/CLT PRIV," but you prefer to use "Attorney/Client Privilege" in the header or footer.
Options Apply to	<p>Choose the pages on which the tag endorsement should be included:</p> <ul style="list-style-type: none"> • All Pages: By default, the endorsement will be added to all pages. • 1st Page: Include endorsement only on the first page of each document. • Skip 1st Page: Include endorsement on all but the first page of each document.
Font	<p>Click Font to define font details (font, font size, style, color, and so forth). Note: The exact font size may not display on this tab. For example, if you select a font size of 10 points, the font size on the tab may display 9.75 pt. Ignore this anomaly of system behavior.</p>

3. After all options are selected, click the arrow on the right side of the **Map Endorsement** button and select the position for the tag information. See the figure in [step 4](#) on page [16-37](#).

Once a selection is made, the tag information will display in the **Image Mapping** area of the workspace.

4. Repeat steps 2 - 3 for other tags to be added to the image in other locations.
5. If you have not done so on another endorsement tab, in the **Image Mapping** area, select the type of page layout.

6. Continue with other endorsement selections described in this section. If needed, edit endorsement selections as explained in "[Change endorsement settings](#)" on page 16-42.
7. When finished, go to the next phase of production:
 - If you are creating a print job, go to "[Selecting Print Options](#)" on page 16-44.
 - For other job types, go to "[Reviewing Production Settings](#)" on page 16-47.

Data fields

Data from specific fields can be included in the header and/or footer of document and page images as follows:

1. On the Endorsement Options workspace, click the **Data Fields** tab.
2. Complete the areas of the workspace as follows.

Field Endorsement Options

Area	Description
Fields	Select the field(s) to be added to the image. To include multiple fields to the same area in the header or footer, Shift+click to select a contiguous set of field names or Ctrl+click to select a non-contiguous set of field names, respectively.
Selected fields	<ul style="list-style-type: none"> • Selected fields: Shows the selected field name(s). • Preview: Shows the selected field data. As needed, click the arrow buttons to move through the field data to be assured that the selections meet your requirements. If the content exceeds the size of the Preview field, click in the field and use the keyboard arrow keys to navigate within the field.

Field Endorsement Options (Continued)

Area	Description
Options Apply to	Choose the pages on which the field endorsement should be included: <ul style="list-style-type: none"> • All Pages: By default, the endorsement will be added to all pages. • 1st Page: Include endorsement only on the first page of each document. • Skip 1st Page: Include endorsement on all but the first page of each document.
Font	Click Font to define font details (font, font size, style, color, and so forth). Note: The exact font size may not display on this tab. For example, if you select a font size of 10 points, the font size on the tab may display 9.75 pt. Ignore this anomaly of system behavior.

3. After the data field options are selected, click the arrow on the right side of the **Map Endorsement** button and select the position for the field data. (See the figure in [step 4](#) on page 16-37.)

The field data will display in the **Image Mapping** area of the workspace.



TIP: If field content is long enough that it will wrap in the selected area, an option is to select it in the **Image Mapping** area and click **Use Full Line**. Instead of wrapping, the data will continue from one area of the header or footer to the next.

4. If you have not done so on another endorsement tab, in the **Image Mapping** area, select the type of page layout.
5. Continue with other endorsement selections described in this section. If needed, edit endorsement selections as explained in "[Change endorsement settings](#)" on page 16-42.
6. When finished, go to the next phase of production:
 - If you are creating a print job, go to "[Selecting Print Options](#)" on page 16-44.
 - For other job types, go to "[Reviewing Production Settings](#)" on page 16-47.

Custom messages

Custom information can be included in the header and/or footer of document and page images as follows:

1. On the Endorsement Options workspace, click the **Custom Messages** tab.
2. Complete message options as follows.

Option	Description
<p>Custom Text Message</p>	<p>Enter needed information (maximum of 500 characters). To enter multiple lines, separate the content of each line with an "at" sign, @. For example, consider the following entry:</p> <div data-bbox="630 800 1414 961" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Options</p> <p>Custom Text Message: HIGHLY CONFIDENTIAL@Attorney's Eyes Only</p> </div> <p>Such an entry will be included as follows in your final production output:</p> <p style="text-align: center;">HIGHLY CONFIDENTIAL Attorney's Eyes Only</p>
<p>Apply to</p>	<p>Choose the pages on which the custom message should be included:</p> <ul style="list-style-type: none"> • All Pages: By default, the endorsement will be added to all pages. • 1st Page: Include endorsement only on the first page of each document. • Skip 1st Page: Include endorsement on all but the first page of each document.
<p>Font</p>	<p>Click Font to define font details (font, font size, style, color, and so forth). Note: The exact font size may not display on this tab. For example, if you select a font size of 10 points, the font size on the tab may display 9.75 pt. Ignore this anomaly of system behavior.</p>

3. After the custom message options are selected, click the arrow on the right side of the **Map Endorsement** button and select the position for the message. (See the figure in [step 4](#) on page 16-37.)



TIP: If the message is long enough that it will wrap in the selected area, an option is to select it in the **Image Mapping** area and click **Use Full Line**. Instead of wrapping, the message will continue from one area of the header or footer to the next.

The message will display in the **Image Mapping** area of the workspace. To remove the last item added, click **Undo Last Add**. (To edit selections after they are made, see ["Change endorsement settings"](#) on page 16-42.)

4. If you have not done so on another endorsement tab, in the **Image Mapping** area, select the type of page layout.
5. Continue with other endorsement selections described in this section. If needed, edit endorsement selections as explained in ["Change endorsement settings"](#) on page 16-42.
6. When finished, go to the next phase of production:
 - If you are creating a print job, go to ["Selecting Print Options"](#) on page 16-44.
 - For other job types, go to ["Reviewing Production Settings"](#) on page 16-47.

Change endorsement settings

Once endorsements have been defined, change them before producing a job as follows:

1. For annotations, click the **Annotations** tab on the Endorsement Options workspace, and make needed changes.
2. To change any of the options for a mapped endorsement (specific content, font, "Apply to" page setting, etc.) you must delete the endorsement (see next step), select new options, and then re-map the endorsement.



NOTE: Changes must be made *before* you map the endorsement.

3. To delete information from the header or footer, click the **Tag Options**, **Image Keys**, **Data Fields**, or **Custom Messages** tab, then:
 - a. To remove the last item added, click **Undo Last Add**. (This button may not be available, depending on your sequence of actions.)
 - b. To remove *all* information in a particular area, click anywhere in that area and then click **Clear Area**.
 - c. To remove a specific line in an area, click the line and then click **Remove**.
4. To add information to the header or footer, complete the needed procedure(s):
 - ["Image keys"](#) on page 16-33
 - ["Tag options"](#) on page 16-37
 - ["Data fields"](#) on page 16-39
 - ["Custom messages"](#) on page 16-41
5. To change wrapping behavior: If field data or other content is long enough that it will wrap in the area of the header/footer where it has been mapped, an option is to select it in the **Image Mapping** area and click **Use Full Line**. Instead of wrapping, the content will continue from one area of the header or footer to the next.

Alternatively, the option can be removed—select an endorsement that has been defined to not wrap and click the **Use Full Line** button. The content will now wrap.

Selecting Print Options

If you are creating a print job, complete the following steps:

1. Click **Print Options** in the Production navigation panel.
2. **Select Printer:** Select either a **Local** or **Batch Printer**. (If you have configured an Eclipse SE print server, batch printers will include those listed in the **Batch Printer** list.) Make sure the printer(s) is available and ready to print.
3. **Output Paper Options:** Select basic printing options:

Option	Description
Paper Tray	Select the paper tray for the job. Options depend on the printer selected and its capabilities. Refer to your printer documentation for details on tray selections.
Staple Documents	If the printer has stapling capability, select this option to staple all pages for a specific document.
Duplex Documents	If the printer has the capability, select this option to print on both sides of the paper.

4. **Banner Sheet:** A banner is a sheet of paper that precedes the first page of and/or follows the last page of the production job (for example, a colored sheet of paper). Select banner options as needed:

Banner Sheet Options

Option	Description
Print Banner Sheet	Select this option to precede the production job with a banner sheet. The start banner includes the following information: <ul style="list-style-type: none"> • Production name • User ID • Number of documents • Case name • Date and time
Print End of Job Banner Sheet	Select this option to end the production job with a banner sheet, printed with "End Print Job."

Banner Sheet Options (Continued)



Option	Description
Banner Sheet Tray	Select the paper tray for which the banner sheet(s) will be taken. Options will depend on the printer selected and its capabilities. Refer to your printer documentation for details on tray selections.

5. **Slip Sheet Options:** A slip sheet is a piece of paper that precedes the first page of each set of pages comprising a document. Select options as listed in the following table.

Printing Slip Sheet Options

Option	Description
Print Slip Sheet	Select this option to include a sheet of paper between documents. The slip sheet can be blank or include text as defined in this area.
Slip Sheet Paper Tray	Select the paper tray for which the slip sheets will be taken. Options will depend on the printer selected and its capabilities. Refer to your printer documentation for details on tray selections.

Printing Slip Sheet Options (Continued)

Option	Description
Slip Sheet Text	<p>If needed, add field data and/or a custom message(s) to slip sheets:</p> <ol style="list-style-type: none"> To select field data, select the needed field from the list and click Add Field. To add a custom message, enter it in the text field and click Add Text. Up to 500 characters will be printed. Repeat steps 1 and 2 to add other information. Each entry is printed on a separate line, so there are practical considerations to how much you can include. When finished, organize the order of multiple lines of data/text by selecting an item to be moved and clicking  or  as needed to relocate the item. If needed, delete a line(s) by selecting it and clicking Remove.


6. **Split Print Job:** Splitting a large production job into multiple print jobs can help you monitor and maintain the printer while the job is being processed. Select options as needed:

Option	Description
Do Not Split Print Job	Select this option to manage the production job as a single print job.
Split Print Job Every	Select this option to separate the production job into multiple print jobs. After selecting this option, enter the number of documents to be included in each print job.

7. When finished, go to ["Reviewing Production Settings,"](#) next.

Reviewing Production Settings

Once all production selections have been made, complete the following steps:

1. Click **Summary** in the Production navigation panel.
2. Review the list of documents and/or pages in the **Image Keys** list.
 **NOTE:** This list is in numerical order based on the document range you selected for production. If you selected a sort order, it will be implemented in the produced load files.
3. If needed, select a document/page in the **Image Keys** list, then click **Create Preview Page** to view the page with headers, footers, and content as you have specified.



NOTE: This is a general preview. If you chose page numbering and/or special endorsement placement (such as first-page only), these choices may not be completely accurate in the preview. Your choices will be correctly implemented in the produced documents.

4. Review the **Production Settings** list to ensure settings are as intended.
5. If needed, make corrections on the appropriate workspace.
6. Continue with "[Completing Production](#)" on page [16-48](#) (to save and run the production).



NOTE: Production settings are saved automatically after a production job is run for the current session. If you need to save settings before the job is run, go to the next procedure.

Completing Production

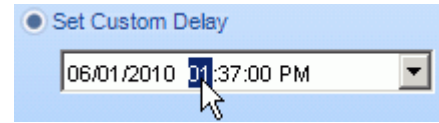
Once all production selections have been made and reviewed, complete the following steps:

1. Click **Produce** on the Production navigation panel. The following messages may appear now or after you complete this procedure.

Message	Description
The following output directory has been used before and may be currently in use. Do you wish to continue?	The output directory you selected in Output Options has been used for production before. Ensure that it is the directory you want to use and that sufficient space is available for the current production.
The case Image Key and/or Dockey fields are selected for load file output and the Image Key endorsement option is Renumber.	Typically, if you renumber image keys for a production set, you will not include the case BEGDOC and possibly DOCKEY fields in load files you are producing. (You will use the new image keys.) Make sure of your selections on the Output Options workspace (fields to include) and on the Endorsement > Image Keys tab are as desired.

2. If you receive any messages, click **Yes** to continue (or make changes and then return to this procedure).
3. If you are printing documents, make sure your printer is available and ready to print.
4. **Delayed Start:** To postpone the job to a later time, select **Delay Start of Production** and then select the type and amount of the delay:
 - a. To postpone the start of the job by a set interval, select **Set Delay Interval** and select the needed time from the corresponding list (common settings ranging from 5 minutes to 6 hours).
 - b. To postpone a job to a custom date and/or time, first select **Set Custom Delay** and continue with step c and/or d.
 - c. To change the date, click next to the field and select a needed date on the calendar. Alternatively, click the month, day, and/or year and enter the needed future date. (If the year will change, enter it *first*.)

- d. To select a custom time, click the number to be changed and enter the needed number (hours, minutes, and/or seconds, as applicable).



5. **Production Numbering:** If you chose other than original image keys for production numbering ("[Image keys](#)" on page 16-33) complete this section to add or replace the content of *begin-* and/or *end-production* image-key fields and/or attachment fields³³ in the case with data from the current production:

- a. Select the needed option(s), **Write Production Image Keys to Case** and/or **Write Production Attach Range to Case**.
- b. For the selected option(s), corresponding begin and/or end production image key fields must exist. Select or create the fields.

If a field needs to be added to the case, select **<new field>** and enter a field name. A new SINGLE_VALUE field will be created.

- c. Select the method by which the production details will be added to each field:
 - **Overwrite existing field data:** Include only the latest production details in the fields.
 - **Append to existing field data:** Add the latest production details to the field.

For example, if production image keys are added to a case and the data is appended, details in the **Case Management > Database Records** table will be similar to the following figure:

Field Data:

Field Name	Field Value
BEGDOC	ABC-0001
ENDDOC	
ProdImageKey	PR1-0001; PR2-0001



NOTE: End-production and production attachment image key fields will always contain data, even if the original fields (ENDDOC, BEGATTACH, ENDATTACH) are blank. If no data exists for the original fields, Eclipse SE will repeat the begin-production image key.

33. Attachment range using production image keys.

6. If you do not need to track the production, such as for a test production, clear the **Update Production History Table** option. Clearing this option will increase efficiency slightly.



NOTE: If the production table is not updated, the production job will not be listed in the **Production History** tab or viewable in Eclipse SE Desktop.

7. If the settings for this production job can be used as a basis for other jobs:
 - a. Click **Save Template**.
 - b. Enter a name for the template (or accept the default name, which is the name of the production job). The following characters cannot be used: / ? < > \ : * |
 - c. Click **OK**, then click **OK** in response to the confirmation message. The template is saved. The following production settings are included in the template:
 - Output Options
 - Image Options
 - Endorsement Options
 - Print Options
 - Production Numbering Options
8. Click **Start Production**. The production begins and the production settings are saved (except as noted above). Evaluate and respond to any messages that appear.

Progress will be indicated in one of two ways – through a status bar in the **Status** area of the workspace and/or by a listing of messages and documents as they are produced in the **Progress** area of the workspace.
9. Monitor progress as needed. When the job is completed, a completion message will display in the **Progress** area.
10. As needed, refer to the administrative files listed in the following table.

Administrative Files for Production

Location	File	Contents
Output directory defined for the production	PRODKEYS.TXT	Production image key details (PRODBEG, PRODEND, PRODBEGATTACH, PRODENDATTACH)
	ATTACH.TXT	Document/attachment image key details (PARENTKEY and ATTACHMENTS)
	Production Errors.TXT	Details on problems encountered during production
Case data directory's ProdXref folder	Production cross-reference file	Original and production image key details, named <i>ProdName_DateTime.TXT</i> , where: <ul style="list-style-type: none"> • <i>ProdName</i> is the production job name and • <i>DateTime</i> is the complete date and time the job was processed.

Using a Production Template

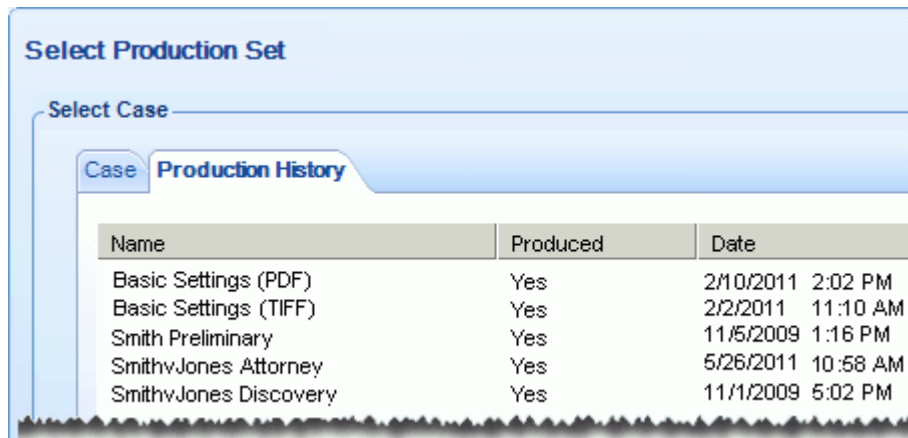
A production template allows you to maintain consistency in the output of various production jobs. If a production template with settings needed for a new production job exists:

1. In Eclipse SE Administration, click the **Production** tab, then click **Create Production** in the Production navigation panel.
2. Select the needed case.
3. Select the documents to be produced as explained in "[Selecting the Production Set](#)" on page 16-4.
4. Click **Import Template**.
5. Click the name of the template to be used and click **OK**.
6. Click **OK** in response to the confirmation message.
7. Click either **Use Range for Production** or **Use Search**, depending on your production set definition.
8. Review all template settings and make changes if needed. Refer to the procedures in "[Creating a New Production Job](#)" on page 16-4 for details.
9. When settings have been checked/changed, complete the following two procedures:
 - "[Reviewing Production Settings](#)" on page 16-47
 - "[Completing Production](#)" on page 16-48

Working with Saved Production Settings

Overview

Saved production settings are listed on the **Production History** tab, as shown in the following figure. Saved settings are typically used to recreate a previous production job using the exact settings as the previous job.



The screenshot shows a dialog box titled "Select Production Set". Inside, there is a "Select Case" section with two tabs: "Case" and "Production History". The "Production History" tab is active and displays a table with the following data:

Name	Produced	Date
Basic Settings (PDF)	Yes	2/10/2011 2:02 PM
Basic Settings (TIFF)	Yes	2/2/2011 11:10 AM
Smith Preliminary	Yes	11/5/2009 1:16 PM
SmithvJones Attorney	Yes	5/26/2011 10:58 AM
SmithvJones Discovery	Yes	11/1/2009 5:02 PM

Creating a Production Job from Saved Settings

To create a production job from saved settings:

1. In Eclipse SE Administration, click the **Production** tab, then click **Create Production** in the Production navigation panel.
2. In the **Select Case** area, click the **Production History** tab.
3. Take one of the following actions to choose settings:
 - To use default settings, click **Default**.
 - To use a saved production job, click its name in the list.
4. Click **Load Production Settings**. The job settings are loaded, except for the documents to be produced.
5. Take one of the following actions to select the documents to be produced:
 - To produce documents defined in the saved settings, click **Execute Production Search**, then **Use Search**.
 - To produce a different set of documents, complete "[Selecting the Production Set](#)" on page 16-4.

6. Click **Output Options** in the Production navigation panel and change the production name, volume name, output directory, and error log location as needed for the new job.
7. Revise other settings if needed. Refer to the following sections for details:
 - ["Selecting Output Options"](#) on page 16-10
 - ["Selecting Image Options"](#) on page 16-25
 - ["Selecting Endorsement Options"](#) on page 16-30
 - ["Selecting Print Options"](#) on page 16-44
8. When finished, check your settings as explained in ["Reviewing Production Settings"](#) on page 16-47.
9. Run the production job as explained in ["Completing Production"](#) on page 16-48.

Deleting Saved Production Settings

Manage production definitions by deleting unneeded jobs:

1. In Eclipse SE Administration, click the **Production** tab, then **Create Production**.
2. In the **Select Case** area, click the **Production History** tab.
3. Click the name of a production job to be removed and click **Delete**.
4. In response to the confirmation message, click **Yes**.
5. Repeat [step 3](#) and [step 4](#) to remove other production jobs.

Appendix A Ipro Eclipse SE .DLF Specification

In this Appendix

- Introduction A-2**
 - About .DLF FilesA-2
 - BasicsA-2
- .DLF Code Summary A-3**
- Code and Syntax Details A-5**
 - Loading Document Fielded Data.....A-5
 - Dates in Field DataA-5
 - Loading Document-Level OCRA-6
 - Loading Document TagsA-7
 - Removing Document TagsA-7
 - Specifying Volume(s)A-8
 - Loading Pages/ImagesA-8
 - Loading Page Tags.....A-10
 - Removing Page Tags.....A-10
 - Loading Page-Level OCR.....A-11
 - Loading Word Coordinates for Page OCR/Extracted TextA-12
 - Loading Redactions.....A-13
 - Loading AnnotationsA-14
 - Loading Transcripts.....A-16
 - Loading Transcript IssuesA-16
 - Loading Transcript TypesA-17
 - Loading Production JobsA-17
 - Loading Production History ItemsA-17
- .DLF Sample A-18**

Introduction

About .DLF Files

A .DLF file is a type of Ipro Tech load-file format for the legal industry. It is an .XML file created when a case (or data) is exported from Ipro Eclipse or other sources. .DLF files can include the following characteristics of a case:

- Annotations
- Document fielded data
- Document and/or page tags
- Document- and/or page-level OCR
- Pages/images
- Production jobs and/or history items
- Redactions
- Transcripts, transcript issues, and/or transcript types
- Volume(s)
- Word coordinates for page OCR and extracted text

This appendix presents .DLF files details. For details on creating a .DLF file, see "[Exporting Case Data](#)" on page 8-42.

Basics

1. .DLF values are delimited with ASCII 24. When subfields are required (currently only for the DBFD and DBRC codes³⁴), the data is delimited with ASCII 25.

In this document, ASCII 24 and ASCII 25 are represented by <24> and <25>, respectively.

2. The engine reads the .DLF from top to bottom, one document at a time. Therefore, all document information (field data, pages, tags, annotations) should be grouped together for each document, before the next document is defined.
3. The engine performs a ReadLine on the .DLF. Therefore, where the data ends in a line-feed character, that constitutes a line. The application creating the .DLF should convert embedded line-feed characters 10 and 13 to ASCII 18 and 19, respectively.

34. See "[.DLF Code Summary](#)" on page A-3 for a summary of the codes discussed in this chapter.

.DLF Code Summary

DLF Code Summary

Code	Description	Format	Page
ANOT	Loads an annotation	ANOT<24>ImageKey<24>Annotation- Type<24>Left<24>Top<24>Right<24>Bot- tom<24>Color <24>FontName <24>FontSize<24>FontStyle<24>FontColor <24>Rotation<24>PixelWidth<24>Text <24> [markup only x1,y1 x2,y2 ...xn,yn]	A-14
DBFD	Database field definition	DBFD<24>Field1<25>Field2<25>Field 3...	A-5
DBRC	Database record (start a new document)	DBRC<24>Data1<25>Data2<25>Data3...	A-5
FOCR	Loads page OCR using a file path	FOCR<24>ImageKey<24>Path to file	A-11
FTXT	Loads document OCR using a file path	FTXT<24>ImageKey<24>Path to File	A-6
OCRT	Loads page OCR	OCRT<24>ImageKey<24>OCR Text	A-11
OCRW	Loads OCR word coordinates	OCRW<24>ImageKey<24>Image- Width<24>ImageHeight<24> Rotation<24>Confidence<24>Word left top width height [optional FontName FontSize] ^ ...	A-12
PAGE	Loads a page	PAGE<24>ImageKey<24>Filepath<24>ImageP- ageNumber <24>Rotation [optional <24>StartOfDocument]	A-8
PRHT	Loads a Production History Record	PRHT<24>Production job Name<24>Original Image Key<24>Produced Image Key<24>Produced Image Path<24>Produced Image Page number	A-17

DLF Code Summary (Continued)

Code	Description	Format	Page
PRJB	Loads a Production Job	PRJB<24>Name<24>Description<24>Date Produced in YYYYMMDD format	A-17
RDAC	Loads a redaction	RDAC<24>ImageKey<24>RedactionCategoryID<24>Left<24>Top<24>Right<24>Bottom<24>Rotation (0-3) [optional<24>RedactionLabel]	A-13
TDIR	Remove a document tag	TDIR<24>ImageKey<24>TagName	A-7
TDIS	Set a document tag	TDIS<24>ImageKey<24>TagName	A-7
TNBD	Sets a document tag (including tag level and rules)	TNBD<24>ImageKey<24>Tag Level 1 [optional<25>Tag Level 2<25>...Tag Level N]<24>Tag Group [optional<24>Tag Rules>]	A-7
TNPG	Sets a page tag (including tag level and rules)	TNPG<24>ImageKey<24>Tag Level 1 [optional<25>Tag Level 2<25>...Tag Level N]<24>Tag Group [optional<24>Tag Rules>]	A-10
TPGR	Removes a page tag	TPGR<24>ImageKey<24>TagName	A-10
TPGS	Sets a page tag	TPGS<24>ImageKey<24>TagName	A-10
TRAN	Loads a Transcript (PFT)	TRAN<24>Transcript Type<24>transcript string in PFT format. NOTE: All CR/LF must be replaced with 19/18.	A-16
TRIS	Loads a Transcript Issue	TRIS<24>Name<24>ForeColor<24>BackColor	A-16
TRTP	Loads a Transcript Type	TRTP<24>Type Name<24>Optional Parent Type Name (<i>One level deep only</i>)	A-17
VOLM	Creates a volume	VOLM<24>VolumeName<24>Path	A-8

Code and Syntax Details

Loading Document Fielded Data

In order to load document fielded data, the .DLF file must contain a DBFD line (the names of the fields) before any DBRC lines (the field values). Embedded line-feed characters 10 and 13 should be represented by 18 and 19, respectively. Multi-value data should be delimited with ASCII 20.

Format

```
DBFD<24>Field 1 name<25>Field 2 name<25>Field 3 name<25>...  
    <25>Field n name
```

```
DBRC<24>Field 1 value<25>Field 2 value<25> Field 3 value  
    <25>... <25>Field n value
```

Examples

```
DBFD<24>BEGDOC<25>SUBJECT<25>AUTHOR<25>RECIPIENTS
```

```
DBRC<24>ABC000001<25>Today's Meeting<25>Robert Smith<25>Mary  
Jones<20>Steve Winter
```

```
DBRC<24>ABC000002<25>Yesterday's Meeting<25>John Doe<25>Robert  
Smith<20>Mary Jones<20>Steve Winter
```

Note: The RECIPIENTS data is multi-valued.

Dates in Field Data

Format

Dates in the field data must be formatted as YYYYMMDD. Partial dates such as 19990000 are supported. DATETIME fields should be formatted in 24-hour format as YYYYMMDDhhmss.

Examples

Note the DATESENT content:

```
DBFD<24>BEGDOC<25>SUBJECT<25>DATESENT
```

```
DBRC<24>ABC000001<25>Today's Meeting<25>20010518
```

```
DBRC<24>ABC000002<25>Yesterday's Meeting<25>19980900
```

```
DBRC<24>ABC000003<25>Friday's Meeting<25>00000422
```

Loading Document-Level OCR

There are two ways to load document-level OCR into a case using a .DLF file:

- FTXT code: Loads document-level OCR for a document in which the text is in the file at the specified path.
- DBFD/DBRC codes: Document-level OCR is loaded in the field data. The case must have a field set up with the type EXTRACTEDTEXT. That field is then mapped during the import process to the column in the .DLF with the OCR text.

NOTE: Embedded line-feed characters in the OCR text will cause an import to fail. The application creating the .DLF should convert ASCII 10 and 13 to 18 and 19, respectively.

FTXT format

```
FTXT<24><ImageKey><24>FilePath
```

FTXT example

```
FTXT<24>ABC0001<24>\\MyServer\Cases\MyCase\Text\ABC0001.TXT
```

DBFD/DBRC format

```
DBFD<24>Image Key<25>FieldName<25>OCRTEXT
```

DBFD/DBRC examples

The administrator has created a case with a BEGDOC field, a SINGLE_VALUE field, and an EXTRACTEDTEXT field.

```
DBFD<24>BEGDOC<25>SUBJECT<25>OCRTEXT
```

```
DBRC<24>ABC0001<25>Today's Meeting<25>Today's meeting was  
interesting, wasn't it?
```

Loading Document Tags

Document tags are specified using either TDIS or TNBD. TNBD is used to specify the complete “chain” for a nested tag.

NOTE: TNBD is supported in Ipro Eclipse SE version 1.5 and later and in Ipro Eclipse version 2.1 and later.

Format

TDIS<24>ImageKey<24>TagName

TNBD<24>ImageKey<24>Tag Level 1 [optional<25>Tag Level 2<25>...<Tag Level N>]<24>Tag Group [optional <24>Tag Rules]

where *Tag Rules* is a numeric value with bitwise settings as follows:

Value	Tag Rule	Value	Tag Rule
0	None	4	View Only
1	Exclusive	8	Require Child Tags
2	Required	512	Include Family

For example, the value to represent both **Include Family** and **Required** is $512 + 2 = 514$.

Examples

TDIS<24>ABC000001<24>Attorneys Eyes Only

TNBD<24>ABC000001<24>Monday Meeting<24>Hot Doc<24>10

Removing Document Tags

Document tags can be removed using a .DLF with the TDIR (with BEGDOC) codes. The image key is followed by the tag name.

Format

TDIR<24>ImageKey<24>TagName

Example

TDIR<24>ABC000002<24>Highly Confidential

Specifying Volume(s)

The volume code is VOLM, followed by the volume name and path. The .DLF can have zero or more VOLM lines. The VOLM line(s) should appear before any PAGE lines in the .DLF file.

Format

```
VOLM<24>VolumeName<24>VolumePath
```

Example

```
VOLM<24>Ipro Eclipse1<24>\\SERVER001\CASEDATA1\IMAGES  
VOLM<24>Ipro Eclipse2<24>\\SERVER001\CASEDATA2\IMAGES
```

Loading Pages/Images

The PAGE code is used to load pages. The PAGE line has the BEGDOC, the path to the image, image page number, rotation, and (optionally) the start of document flag.

The image page number should be 0 for single page image files. If the image file has multiple pages, the number in the PAGE line should be 1 for the first page, 2 for the second page, and so on. Rotation (clockwise) is one of the following:

- 0 (0 degrees)
- 1 (90 degrees)
- 2 (180 degrees)
- 3 (270 degrees)

If the start-of-document flag is included, it should be 1 to indicate start of a new document, otherwise it should be 0.

The import will not fail if any of the image files are not physically present. However, in the Ipro Eclipse SE Desktop, the user will not be able to see the images. It is best to use a volume in the PAGE lines so that the administrator can easily change the path later.

Format

```
PAGE<24>ImageKey<24>ImagePath<24>ImagePageNumber<24>Rotation  
<24>StartOfDocument
```

Note: StartOfDocument is optional.

Example 1: Volume specification

Loads a page with a volume specified:

```
PAGE<24>ABC000001<24>@Ipro  
Eclipse1@001\ABC000001.TIF<24>0<24>0
```

Example 2: Hardcoded image path

Loads a page with a hardcoded image path:

```
PAGE<24>ABC000002<24>\\SERVER01\CASEDATA1\IMAGES\001\  
ABC000002.TIF<24>0<24>0
```

Example 3: Multi-page image file

Loads three pages in a multi-page image file:

```
PAGE<24>ABC000003<24>@Ipro  
Eclipse1@001\ABC000003.TIF<24>1<24>0  
PAGE<24>ABC000004<24>@Ipro  
Eclipse1@001\ABC000003.TIF<24>2<24>0  
PAGE<24>ABC000005<24>@Ipro  
Eclipse1@001\ABC000003.TIF<24>3<24>0
```

Example 4: Image rotation

Loads a page that is rotated 90 degrees clockwise:

```
PAGE<24>ABC000006<24>\\SERVER01\CASEDATA1\IMAGES\001\  
ABC000006.TIF<24>0<24>1
```

Example 5: Document consolidation

Loads five pages into two documents:

```
PAGE<24>ABC000007<24>C:\CASEDATA1\IMAGES\001\  
ABC000007.TIF<24>0<24>0<24>1  
PAGE<24>ABC000008<24>C:\CASEDATA1\IMAGES\001\  
ABC000008.TIF<24>0<24>0<24>0  
PAGE<24>ABC000009<24>C:\CASEDATA1\IMAGES\001\  
ABC000009.TIF<24>0<24>0<24>0
```

```
PAGE<24>ABC000010<24>C:\CASEDATA1\IMAGES\001\  
ABC000010.TIF<24>0<24>0<24>1  
PAGE<24>ABC000011<24>C:\CASEDATA1\IMAGES\001\  
ABC000011.TIF<24>0<24>0<24>0
```

Loading Page Tags

Page tags are specified using TPGS and TNPG. TNPG specifies the complete "chain" for a nested tag.

NOTE: TNPG is supported in Ipro Eclipse SE version 1.5 and later and in Ipro Eclipse version 2.1 and later.

Format

```
TPGS<24>ImageKey<24>TagName
```

```
TNPG<24>ImageKey<24>Tag Level 1 [optional<25>Tag Level  
2<25>...<Tag Level N>]<24>Tag Group [optional<24>Tag Rules]
```

See the format information in "[Loading Document Tags](#)" on page [A-7](#) for tag rule details.

Example

```
TPGS<24>ABC000001<24>Confidential  
TNBD<24>ABC000001<24>Monday Meeting<25>8:30 Mary's  
Presentation<24>Hot Doc<24>10
```

Removing Page Tags

Page tags can be removed using a .DLF with the TPGR code. The TPGR code is followed by the image key and tag name.

Format

```
TPGR<24>ImageKey<24>TagName
```

Example

```
TPGR<24>ABC000002<24>Produce
```

Loading Page-Level OCR

There are two ways to load page-level OCR. The first is to use the FOCR code with a path to the text files. The second is to use the OCRT code with actual text to load.



NOTE: .DLF files from Ipro Eclipse may include OCRT codes with paths instead of the text itself. To import such a file into Eclipse SE, ensure the files exist in the specified location(s) and then search for/replace "OCRT" with "FOCR" in the .DLF file.

FOCR format

The path to the text file is provided in the FOCR line along with the Image Key:

```
FOCR<24>ImageKey<24>Path to Text File
```

FOCR example

```
FOCR<24>ABC0001<24>\\MyServer\Cases\MyCase\Text\ABC0001.TXT
```

OCRT format

The OCRT code is followed by the image key and the OCR:

```
OCRT<24>ImageKey<24>OCR Text
```



NOTE: Embedded line-feed characters in the OCR text will cause the import to fail—the application creating the .DLF should convert ASCII 10 and 13 to 18 and 19, respectively.

OCRT example

```
OCRT<24>ABC000001<24>This is the first line of the OCR  
text<18><19>This is the second line text
```

Loading Word Coordinates for Page OCR/Extracted Text

Word coordinates for page OCR and extracted text are loaded using the OCRW code.

Formats

Basic

```
OCRW<24>ImageKey<24>ImageWidth<24>ImageHeight<24>Rotation<24>  
Confidence<24>[OCR Word Coordinate String]
```

OCR word coordinate string format

```
Word|Left|Top|Width|Height[Optional Font Settings]^
```

Optional font settings format

```
|FontName|FontSize
```

NOTE: If FontName and FontSize are included on a word, then that font will be applied the current word and all succeeding words until a new font is specified.

Example

```
OCRW<24>ABC000001<24>160<24>22<24>0<24>90<24>  
The|0|0|26|22^Cat|29|0|27|22^Slept|61|0|40|22
```

Loading Redactions

Redactions are loaded using the RDAC code. The RDAC code is followed by the image key, redaction category ID, coordinates, rotation, and the redaction label.

The coordinates are Left, Top, Right, and Bottom, respectively. The possible rotation values, all clockwise, are:

- 0 (0 degrees)
- 1 (90 degrees)
- 2 (180 degrees)
- 3 (270 degrees)

Notes:

1. The redaction category ID is the ID of the redaction category defined in the Ipro Eclipse case. If the category Id does not exist in the case, the engine ignores the RDAC line and logs an error.
2. Redactions are always added. The engine does not change existing redactions.

Format

```
RDAC<24>ImageKey<24>Redaction Category Id<24>Left  
<24>Top<24>Right<24>Bottom<24>Rotation<24>Redaction Label
```

Example 1: Redaction specification

Loads a redaction for image key ABC000001 where redaction category ID 5 is defined in the case with coordinates Left, Top = 183, 119 and Right, Bottom = 255, 235. The redaction is not rotated. If the redaction category ID 5 does not exist in the case, the import engine ignores this line and logs an error.

```
RDAC<24>ABC000001<24>5<24>183<24>119<24>255<24>235<24>0
```

Example 2: Redaction specification for rotated image

Loads a redaction for image key ABC000001 where redaction category ID 8 is defined in the case with coordinates Left, Top = 216, 55 and Right, Bottom = 290, 104. The redaction is rotated 90 degrees clockwise. If the redaction category ID 8 does not exist in the case, the import engine ignores this line and logs an error.

```
RDAC<24>ABC000001<24>8<24>216<24>55<24>290<24>104<24>1
```

Example 3: Redaction specification for default redaction category

Ignores the RDAC line and logs an error unless the user has specified a default redaction category in the Ipro Eclipse SE Administration Import Data workspace. If the user has specified, for example, "Redacted" as the default category, the line below will be imported with the "Redacted" category and not "Confidential."

```
RDAC<24>ABC000001<24>0<24>183<24>119<24>255<24>235<24>0
    <24>Confidential
```

Loading Annotations

Annotations are loaded using the ANOT code. The ANOT code is followed by the following details:

- Image key
- Annotation type
- Coordinates
- Color
- Font name
- Font size
- Font style
- Font color
- Rotation
- Pixel width
- If the annotation is Markup: The markup text and markup x,y points.

Format

Basic

```
ANOT<24>ImageKey<24>Annotation Type<24>Left<24>Top<24>Right
    <24>Bottom<24>Color<24>Font Name<24>Font Size
    <24>Font Style<24>Font Color<24>Rotation<24>Pixel Width
    <24>Text<24>[Markup Values]
```

Markup values

Markup values are only used for Annotation Type 3 (Markup). For other annotation types, this field should be left blank.

```
x1, y1 | x2, y2 | ... | xn, yn
```

Annotation details:

1. Possible values for **Annotation Type** are:
 - 0 (Highlights)
 - 1 (Sticky Flag)
 - 2 (Embedded Text)
 - 3 (Markup)
2. **Font Size** is an integer value.
3. **Font Style** is a bit-encoded integer with one or more of these values:
 - 0 (none)
 - 8 (bold)
 - 4 (italic)
 - 16 (underline)
4. **Color** and **Font Color** fields are RGB values represented as integers.
5. Possible values for **rotation**, all clockwise, are:
 - 0 (0 degrees)
 - 1 (90 degrees)
 - 2 (180 degrees)
 - 3 (270 degrees).
6. **Pixel Width** is an integer value.
7. Annotations are always added. The engine does not change existing annotations.

Example 1: Highlight annotation

```
ANOT<24>ECL000001<24>0<24>540<24>228<24>896<24>292
<24>-2130706688<24><24>0<24>0<24>0<24>0<24>0<24><24>
```

Example 2: Sticky flag annotation

```
ANOT<24>ECL000001<24>1<24>1348<24>388<24>0<24>0<24>0<24><24>0
<24>0<24>0<24>0<24>0<24>0<24>This is a sticky note<24>
```

Example 3: Embedded text annotation

```
ANOT<24>ECL000001<24>2<24>404<24>588<24>732<24>700<24>0
<24>Microsoft Sans Serif<24>8<24>0
<24>-16777216<24>0<24>0<24>This is embedded Text<24>
```

Example 4: Markup annotation

```
ANOT<24>ECL000001<24>3<24>0<24>0<24>0<24>0<24>-1811939328
<24><24>0<24>0<24>1811939328<24>0<24>5<24>
<24>104,224|112,224|252,188|320,184|352,192|360,208
```

Loading Transcripts

Transcripts are loaded using the TRAN code. The TRAN code is followed by an optional Transcript Type (fully qualified name) which is then followed by the transcript string in PFT format, that is, if the transcript was saved to disk/file in PFT format, then this string would represent the entire contents of the transcript file. Any embedded [CR][LF] characters in the transcript string should be replaced with chars [19][18] so the entire transcript record will be contain on a single .DLF record line. Transcript Issues (code TRIS) should be included in a .DLF file prior to including any transcripts.

NOTE: If the transcript line does not include a designated transcript type, the delimiter is still required but the value may be blank.

Format

```
TRAN<24>Transcript Type<24>Transcript string
```

Loading Transcript Issues

Transcript issues are loaded using the TRIS code. The TRIS code is followed by the issue name/description, foreground color, and then background color.

Format

```
TRIS<24>Issue Name<24>Foreground Color<24>Background Color
```

Loading Transcript Types

Transcript Types are loaded using the TRTP code. The TRTP code is followed by the type name/description which is followed by an optional Parent Transcript Type which is used to create a one-level deep hierarchy structure. A Parent Type must exist as a valid Transcript Type and every Transcript Type must be a unique name.

Format

```
TRTP<24>Transcript Type<24>Optional Parent Transcript Type
```

Loading Production Jobs

Production Jobs are loaded using the PRJB code. The PRJB code is followed by the production name, description, and produced date in YYYYMMDD format.

Format

```
PRJB<24>Production Name<24>Production Description  
<24>Produced Date (YYYYMMDD format)
```

Loading Production History Items

Production History Items/Records are loaded using the PRHT code. The PRHT code is followed by the production name, original image key, produced image key, produced image file path, and produced image page number.

NOTE: Production jobs should be included in the .DLF file before including any production history items.

Format

```
PRHT<24>Production Name<24>Original Image Key  
<24>Produced Image Key<24>Produced Image File Path  
<24>Produced Image Page Number
```

.DLF Sample

```
DBFD<24>BEGDOC<25>Document
ID<25>EXPORTED_NATIVE_FILE<25>Application
Name<25>Author<25>BCC<25>Body<25>Category<25>CC<25>Creation
Date<25>EM Relative path<25>From<25>Key Words<25>Location<25>Page
count<25>Recipients<25>Sent Date<25>Subject<25>Title<25>Word
count<25>OCR_TEXT<25>FILETYPE<25>Parent ID<25>HTML
VOLM<24>Ipro Eclipse<24>c:\_templ

VOLM<24>Ipro
Eclipse_003<24>\\server001\IproDEMODBRC<24>ECL000001<25>
0000000001<25>C:\Ipro
Eclipse_003\IMG_0001\ECL000001.mht<25><25><25><25>Hi Mick, FYI. I
will be re-running migration on steri-dand. We tested the extended
delete script last night. A few minor change
(BillingCustomerExclusion has to be deleted as well, and SSCC/Route
need not). Adjusted to order too overcome constraints. Verified
replication worked against our CAR plus desktop/ppc/win services
all ran fine. More confident now that we hv a script that cleans up
all . Let me know if you wanna monitor ProdtN CAR repl . I will
wait for your go ahead before running delete script Cheers Derek
Yong Daniels SharpSmart Pty Ltd 34 Cahill St. Dandenong, Victoria,
Australia 3175 Ph.+61 3 9797-5677 Fax 9797-5638 Mobile +61 (0)
412 990 655 "This email (including any attachments) is intended
only for the use of the individual or entity named above and
contains information that is confidential and legally permissioned.
If you are not the intended recipient, you are hereby notified that
any use, disclosure, dissemination, distribution or copying of this
email or attachments is strictly prohibited. All content is to be
treated as confidential, and is not to be forwarded to any other
party without the prior permission of the writer. If you have
received this email in error, do not read it but please notify the
writer immediately by return email and destroy the original
message. Thank you."<25><25>Angela KirwanStuart FrenchTed
Smith<25>20060728<25>Deleted Items<25>Derek
Yong<25><25>\\MyServer\Share\Calvin\TEST DATA\Large PST\1.05 GB-
>Skinner_David.pst->Deleted Items<25>1<25>Michael
Branson<25><25>Redoing Migration on Steri<25><25><25>From: Derek
Yong?To: Michael Branson? CC: Angela Kirwan; Stuart French; Ted
Smith?Sent: 7/28/2006 12:21:42 AM?Subject: Redoing Migration on
Steri?Hi Mick,?FYI. I will be re-running migration on steri-dand.
```

We tested the extended delete script last night. A few minor change?(BillingCustomerExclusion has to be deleted as well, and SSCC/Route need not). Adjusted to order too overcome constraints.??Verified replication worked against our CAR plus desktop/ppc/win services all ran fine. More confident now that we hv a script?that cleans up all .??Let me know if you wanna monitor Prodn CAR repl . I will wait for your go ahead before running delete script?Cheers??Derek Yong?Daniels Sharpsmart Pty Ltd?34 Cahill St. Dandenong, Victoria, Australia 3175?Ph.+61 3 9797-5677?Fax 9797-5638?Mobile +61 (0) 412 990 655??"This email (including any attachments) is intended only for the use of the individual or entity named above and contains information that is confidential and legally permissioned. If?you are not the intended recipient, you are hereby notified that any use, disclosure, dissemination, distribution or copying of this email or attachments is strictly prohibited. All?content is to be treated as confidential, and is not to be forwarded to any other party without the prior permission of the writer. If you have received this email in error, do not?read it but please notify the writer immediately by return email and destroy the original message. Thank you."?<<Page1>>?<25>MHT<25><25>C:\Ipro Eclipse_003\IMG_0001\ECL000001.MHT

PAGE<24>ECL000001<24>@Ipro
Eclipse_003@IMG_0001\ECL000001.TIF<24>0<24>0<24>

TPGS<24>ECL000001<24>SECC

ANOT<24>ECL000001<24>0<24>540<24>228<24>896<24>292<24>-
2130706688<24><24>0<24>0<24>0<24>0<24>0<24><24>

ANOT<24>ECL000001<24>1<24>1348<24>388<24>0<24>0<24>0<24><24>0<24>0<24><24>This is a sticky note<24>

ANOT<24>ECL000001<24>2<24>404<24>588<24>732<24>700<24>0<24>Microso
ft Sans Serif<24>8<24>0<24>-16777216<24>0<24>0<24>This is embedded
Text<24>

ANOT<24>ECL000001<24>3<24>0<24>0<24>0<24>0<24>-
1811939328<24><24>0<24>0<24>-
1811939328<24>0<24>5<24><24>104,224|112,224|252,188|320,184|352,19
2|360,208

Appendix A, Ipro Eclipse SE .DLF Specification

OCRT<24>ECL000001<24>Comparison of I-lit DataBrowsvi Market Shares According to AdKn.owledgec and UIUC- - -- - - (ISources. kjicpwkdi!c dataI- - !:ts.!p! (ULLJCi- - rvficro.cntr (LCUC)Nliuosull I AdKiiow!edgc.-!- - -7060I50Ii_ --_-I

DBRC<24>ECL000002<25>0000000002<25>C:\Ipro Eclipse_003\IMG_0001\ECL000002.mht<25><25><25><25><25><25><25>2006 0718<25>Calendar<25>russ@medicalwastesolutions.com<25><25>\MyServer\Share\Calvin\TEST DATA\Large PST\1.05 GB->Skinner_David.pst->Calendar<25>1<25>russ@medicalwastesolutions.com<russ@medicalwastesolutions.com>'David Skinner'<DSkinner@danielsinternational.com>'John Trelo'<JTrelo@danielsinternational.com>Nardell, Mark</O=MSE1/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=MNardell>'Rick Bielski'<rickmedwaste@yahoo.com><25><25>Updated: Ascension Health Conference Call-sorry should be 10am eastern time 9am central<25><25><25>From: russ@medicalwastesolutions.com <russ@medicalwastesolutions.com>?Sent: 7/18/2006 3:40:06 PM?To: russ@medicalwastesolutions.com <russ@medicalwastesolutions.com>; 'David Skinner'<DSkinner@danielsinternational.com>; 'John Trelo' <JTrelo@danielsinternational.com>; Nardell, Mark<MNardell@sharpmart.com>; 'Rick Bielski' <rickmedwaste@yahoo.com>?Subject: Updated: Ascension Health Conference Call-sorry should be 10am eastern time 9am central??Start: Mon 7/24/2006 2:00:00 PM?End: Mon 7/24/2006 3:00:00 PM?Recurrence: (none)?Meeting Status: Accepted??Required Attendees: russ@medicalwastesolutions.com; 'David Skinner'; 'John Trelo'; Nardell, Mark; 'Rick Bielski'?<<Page1>>?<25>MHT<25><25>C:\Ipro Eclipse_003\IMG_0001\ECL000002.MHT

PAGE<24>ECL000002<24>@Ipro Eclipse_003@IMG_0001\ECL000002.TIF<24>0<24>0<24>

TPGS<24>ECL000002<24>Produce

RDAC<24>ECL000002<24>1<24>568<24>300<24>1172<24>432<24>0

OCRT<24>ECL000002<24>USJLJ !SlIltIotaI

DBRC<24>ECL000003<25>0000000003<25>C:\Ipro Eclipse_003\IMG_0001\ECL000003.mht<25><25><25><25>NOTE: This email message may contain information that may be permissioned, confidential, and exempt from disclosure. It is intended for use only by the person to whom it is addressed. If you received this message in error, please do not forward or use this information in any way, delete it immediately, and contact the sender as soon as

possible by the reply option or by telephone at the telephone number listed (if available). Thank you.<25><25><25>20060501<25>Calendar<25>William Martin<25><25>\\MyServer\Share\Calvin\TEST DATA\Large PST\1.05 GB->Skinner_David.pst->Calendar<25>1<25>William Martin<WMartin@ascensionhealth.org>David Skinner</O=MSE1/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=Davids><25><25>David Skinner (11:00 AM EST, 10:00 AM CST)<25><25><25>From: William Martin <WMartin@ascensionhealth.org>?Sent: 5/1/2006 6:44:30 PM?To: William Martin <WMartin@ascensionhealth.org>; David Skinner <davids@sharpsmart.com>?Subject: David Skinner (11:00 AM EST, 10:00 AM CST)?Location: David to initiate call to Bill's office (313.343.4554)? Start: Wed 5/3/2006 3:00:00 PM?End: Wed 5/3/2006 4:00:00 PM?Recurrence: (none)?Meeting Status: Accepted??Required Attendees: William Martin; David Skinner?NOTE: This email message may contain information that may be permissioned, confidential, and exempt from disclosure. It is intended for use only by the person to whom it is addressed. If you received this message in error, please do not forward or use this information in any way, delete it immediately, and contact the sender as soon as possible by the reply option or by telephone at the telephone number listed (if available). Thank you.<<Page1>><25>MHT<25><25>C:\Ipro Eclipse_003\IMG_0001\ECL000003.MHT

PAGE<24>ECL000003<24>@Ipro
Eclipse_003@IMG_0001\ECL000003.TIF<24>0<24>0<24>
TPGS<24>ECL000003<24>Produce

OCRT<24>ECL000003<24>Decline in*Sr are (ii SLACCLuL!iIILl
hs.:! ui!iI!n!ec4)1(1(lvuH(Where KnO!Vn)S.-Nc!scapesAOL Uscrk Who I
) !iAcces' the luiernelM!NC!IN SF Accnrcki p! F!.:flDL- -
- N eL!!ajx ! S L:u! A!b u!Pr AOL Norj_II!!r 'ci!i
kIli!Wp1I!I!Li 1:)'
.!Compared to the I ediri!t iiiShare c!r I. se" Oiiiiining30-9!Q1
11(1 !Q3I

Appendix B LFP Commands Supported by Ipro Eclipse SE

In this Appendix

- Introduction B-1**
 - Overview B-1
 - Supported Commands Summary B-2
- Command Details B-2**
 - Annotations (AN) B-3
 - Full-text Search Highlights (FT) B-3
 - Importing a New Page (IM) B-4
 - Applying a Tag to an Image (IS) B-7
 - Defining Original File for EDD Image (OF) B-7
 - Including OCR Text in the .LFP File (OI) B-9
 - Original Text (OT) B-10
 - Changing the Location of a Volume (VN) B-11

Introduction

Overview

Ipro Eclipse SE can import Ipro Tech .LFP load files, which are created by scanning software or conversion programs. Ipro Eclipse SE can also export to an .LFP file.

Commands in .LFP files provide information such as:

- The location, file type, boundary, and image key for an image file
- The position, size, and color of redactions or highlights
- The content of any information-only fields
- Any embedded text or sticky notes (annotations)
- The search words and their position on the image

NOTE: Not all .LFP commands are currently supported by Ipro Eclipse SE. Details about supported commands are provided in the following paragraphs.

Supported Commands Summary

The following table lists the commands currently supported in Ipro Eclipse SE. Details are provided on the referenced pages.

Supported Command	Description	Page
AN	Defines annotations (including redactions) that have been applied to image. (This is a system-generated code.)	B-3
FT	Full-text search highlights. (This is a system-generated code.)	B-3
IM	Image master record command. This is the basis for displaying the images in Ipro Eclipse SE (and for other image management functions).	B-4
IS	Defines tags that have been applied to image.	B-7
OF	Provides the location and original file for a file produced by an Ipro Tech electronic discovery tool.	B-9
OI	The identifier that tells the system to include the OCR Text. (This is a system-generated code.)	B-10
OT	Provides the image key and the location of the path where the original text files reside.	B-10
VN	Defines volume location.	B-11

Command Details

The following paragraphs provide details for the .LFP commands supported by Ipro Eclipse SE.

NOTE: .LFP import files containing the following lines must also include applicable IM lines: AN, OF, VN. (IM lines are not mandatory for .LFP files containing only OI, OT, and/or FT lines.)

Annotations (AN)

Description

The AN command is system-generated; it defines annotations that have been applied to the images. Review, but do not alter, AN lines.

Format

AN,[Image Key],[Annotation Type, e.g., M],[coordinates of annotation]

Example

```
AN,ABC-003,M,^64^0^0^0^0^0^0^0^16711680^30^0^4305/20/2010^
```

Full-text Search Highlights (FT)

Description

The FT command is system-generated; it provides the search words for an image, along with the information needed to highlight the word when it is found in an OCR text search. Review, but do not alter, FT lines.

If the OCR program provides the level of confidence, it is included (preceded by a colon).

Format

FT,[Image Key],[Word's Size],[Word's Position on Page:Confidence Level, Text|Search coordinates|Search Coordinates|...]

Example

In the following example, the OCR program had 97 percent confidence in the OCR generated.

```
FT,ABC-002,2544,3304:97,TERRITORY|373|79|226|27^
  OF|616|79|48|27^ARIZONA|681|79|179|27^
  SS|978|120|39|25^COUNTY|373|161|165|29^
  OF|554|161|49|29^
  COCHISE|620|161|171|29^
  JOSEPH|524|244|143|26
```

Importing a New Page (IM)

Description

The IM command is used to build the image master database for a project or to append additional image master records to an existing project. An image master record is the basis for displaying the images in Ipro Eclipse SE and for other image management functions. The image master records for case images must be loaded into a case before any other .LFP commands are loaded. The image master records facilitate the display and management of all of the annotations, highlights, and other information associated with case images.

Generally, the scanning vendor supplies an image master record for each image they produce, and delivers the image master along with the images.

Format

IM,[Image Key],[Boundary Flag],[Offset],[Unique Filename];[Type],[Rotate]

Elements of this command are described in the following table.

IM Command Elements

Component	Description
[Image Key]	The unique image key for the image. Maximum size: 70 characters.
[Boundary Flag]	<p>A single letter that identifies a particular record as a boundary. Any letter may be used to identify project boundaries as long as it matches the boundary level defined in the project setup. To simplify internal procedures, consistency between projects is recommended. Whether boundaries are set at scan time depends on project needs and the capabilities of the scanning vendor.</p> <p>Maximum number of boundary levels: 8</p> <p>Common boundary flags and the identifiers include:</p> <ul style="list-style-type: none"> • B = Box • C = Child • Note: For page without boundaries, uses a space or empty. • D = Document • F = Folder • S = Source

IM Command Elements (Continued)

Component	Description	
[Offset]	The location of the Ipro Tech image in the file. If images are standard single-image files, the offset for each record will be 0 (zero). For example, the fourth image in the file has an offset of 3.	
[Unique Filename]	The complete filename and path to the image. <ul style="list-style-type: none"> • The first part of the filename portion is the volume name. All volume names are preceded by the "at" sign, @. If the volume name is supplied, a drive letter in the path is not necessary. • The path to the image is next. If a volume name exists, the drive letter is not entered with the path. If a volume name is not included, the drive letter and the complete path must be included in the format provided in the examples following this table. • The filename of the image follows the path. Size limitations:	
	Element	Max. Characters
	Image key	70
	Volume name	30
	File name	80
	Path to Volume (in VN command) plus path to file (in IM command)	197
Path to Volume (in VN command) plus path to file plus filename (in IM command)	217	
[Type]	Code for the image file format: <ul style="list-style-type: none"> • 2 - Single or multiple page TIFF (.TIF) • 4 - Color Image .JPG, .BMP, .PNG, .PCX • 7 - .PDF Older formats: <ul style="list-style-type: none"> • 1 - Ipro Tech image (.IMG) • 3 - Ipro Tech stacked TIFF (.STF) • 5 - Early version black and white PDF • 6 - Early version Color PDF • 99 - Placeholder 	

IM Command Elements (Continued)

Component	Description
[Rotate]	The degree to which a page is rotated. This setting is optional; it is not present unless the image has been rotated. Values include: <ul style="list-style-type: none"> • 0 = 0 degrees • 1 = 90 degrees • 2 = 180 degrees • 3 = 270 degrees

Examples

Example 1

The following example shows two Ipro Tech image master records for the same image. The first image is not rotated; the second image is rotated 90 degrees to the right.

```
IM,ALG-1-000001,S,87576658,0000001K.TIF;2
IM,ALG-1-000001,S,87576658,0000001K.JPG;4,1
```

Example 2

The following example loads one image in a PDF file. The color PDF is rotated 90 degrees.

```
IM,0001,F,1,@FLD02;IMAGES\00\00;0001.PDF;7,1
```

Example 3

The following example shows pages 2 and 3 of a multi-page TIFF file. Notice that the file name is the same for both images (ABC-00010 and ABC-00011). The offset indicates the page number and is immediately before the at sign (@) in the .LFP command.

```
IM,ABC-00010,,2,@Vol01;Vol1001/001;ABC-00010.TIF;2
IM,ABC-00011,,3,@Vol01;Vol1001/001;ABC-00010.TIF;2
```

Example 4

The following example shows image format type 99, which is a placeholder image.

```
IM,MSC-00025,D,0,@;;;99
IM,MSC-00036,0,@;;;99
```

Applying a Tag to an Image (IS)

Description

The IS command applies a specific issue tag to an image.

Format

```
IS, [Image Key], [Tag Name]
```

Component	Description
IS	The identifier that tells the system this is an issue (or tagged database) record.
[Image Key]	The image key to which the tag is being assigned.
[Tag Name]	The tag name, such as <i>Privileged</i> or <i>Urgent</i> . Limit: 60 characters.

Example

The following example shows that image ABC-000006 has two tags (Privileged and Urgent).

```
IS,ABC-000006,Privileged
```

```
IS,ABC-000006,Urgent
```

Defining Original File for EDD Image (OF)

Description

The OF command provides the location and original filename for a file discovered and produced by an Ipro Tech electronic discovery tool. This command enables the recipient of the electronic discovery files to open the file directly in Ipro Eclipse SE.

Format

OF,[Image Key],[Unique Filename (complete path to and filename of the file)],[Page in File]

Elements of this command are described in the following table.

Component	Description
OF	The identifier that tells the system this is an original filename (EDD) record
[Image Key]	The image key for the EDD image.
[Unique Filename]	The complete filename and path to the file.
[Page in File]	The position or sequence of this image in the file (for example, the third page in the document).

Examples

Example 1

In the following example:

- the Ipro Tech electronic discovery tool copied files to the location,
- The TIFF image was exported to Export\doc001\BAT0001\IMG_0001\XN-0001.TIF, and
- the original file for this image is copied to Export\doc001\BAT0001\OF_0001\XN-0001\whitepaper.doc

```
OF,XN-0001,@doc001;BAT0001\OF_0001\
XN-0001;whitepaper.doc,1
```

Example 2

In the following example, the Ipro Tech electronic discovery tool did not copy the original files to a different location, but created the path to the location of the original files.

```
OF,XN-0001,T:\Data\doc.prj\BAT0001.bch\000001\V000\D001\
whitepaper.doc,1
```

Including OCR Text in the .LFP File (OI)

Description

The “Include Original OCR Text in Ipro .LFP File” option in Ipro OCR will automatically include the OCR text in the .LFP file when it generates the Word List .LFP file during OCR processing. This command and its data will follow the FT command and its data for each image in the .LFP file.

Format

OI,[Image Key],[The image’s OCR text....]

Elements of this command are described in the following table.

Component	Description
OI	The identifier that tells the system to include the OCR text.
[Image Key]	The image key from which the OCR text was generated.
[The image’s OCR text....]	The image’s OCR text is the actual OCR text from the image. Two empty boxes will appear at the end of the OCR text to indicate a line return.

Example

The first line in the following example is a simple OI line. The second line shows the image key enclosed in << >>, which signifies that the option to include the image key was selected during the OCR process. The two boxes indicate a line return.

```
OI,ALG-01-011,the chromium levels were especially high in the
    east well
```

```
OI,ALG-01-011,<< ALG-01-011 >>, the chromium levels were
    especially high in the east well
```

Original Text (OT)

Description

The OT command provides the image key and the location of the path where the original text files reside.

Format

OT,[Image Key],[Path of OCR Text Files]

Example

The following example defines a path on the C:\ drive for the text file corresponding to image key EXH-01-0001.

```
OT,EXH-01-0001,C:\DATA\OCRTEXT\EXH-01-0001.TXT
```


Changing the Location of a Volume (VN)

Description

The VN command updates the image file storage location.

Format

VN,[Volume Name],[Storage String],[Access Type]

Elements of this command are described in the following table.

Component	Description
VN	The identifier that tells the system that this is a volume name record. It is required.
[Volume Name]	The volume name. It is required. Maximum size: 30 characters.
[Storage String]	The direct access path. Size limitations: <ul style="list-style-type: none"> The path to volume (in VN command) plus the path to file in IM command cannot exceed 197 characters. The path to volume (in the VN command) plus path to file plus filename (in IM command) cannot exceed 217 characters.
[Access Type]	Type of access, including one of the following: <ul style="list-style-type: none"> Alternate volume path = 99 Direct access = 0 Local CD-ROM = 10

Example

The following example specifies an alternate path for the volume.

```
VN,EDDONLY001,C:\IMAGES\EDDONLY001\,99
```


Appendix C Eclipse SE EDRM Specification

In this Appendix

- Introduction..... B-1**
- XML Structure B-2**
 - Documents B-3
 - Field Data B-3
 - Image Keys B-3
 - Review Data B-4
 - Document Tags B-4
 - Page Tags B-4
 - Redactions..... B-4
 - Annotations B-5
 - Image Files..... B-5
 - OCR..... B-5
 - OCR Word Coordinates B-6
 - Volume B-6
 - Sample EDRM B-7

Introduction

This appendix presents the specification for Eclipse SE .XML (EDRM-compliant) load files. See http://edrm.net/xml_distrib/wp-content/uploads/EDRM.xsd for the EDRM schema.

EDRM is the Electronic Discovery Reference Model, an e-discovery standard, including an XML schema, that facilitates transfer and use of electronic information across software programs.

Eclipse SE supports importing and exporting an EDRM-compliant load file for the following components of a case:

- Document Tags
- Page Tags
- Field Data
- Volume
- Image Files
- Page OCR
- OCR Word Coordinates
- Redactions
- Annotations
- Relationships

XML Structure

```
<?xml version="1.0" encoding="utf-8" ?>
<Root>
  <Batch>
    <Documents>
      <Document>
        <Tags>
          ...field data is listed in <Tag> elements...
        </Tags>
        <Files>
          ...image data is listed in <File> elements...
        </Files>
        <Reviews>
          ...doc tags, page tags, redactions, annotations listed in <Review> elements...
        </Reviews>
        <CustomDocumentInfo>
          ...image keys are stored in this element...
        </CustomDocumentInfo>
      </Document>
      <Document>
        ...next document...
      </Document>
    </Documents>
    <Relationships>
      ...parent/child relationships listed in this element...
    </Relationships>
  <CustomBatchInfo>
    ...volume information listed in this element...
  </CustomBatchInfo>
</Batch>
</Root>
```

Documents

```
<Documents>
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain"/>
<Document DocID="0000000002" DocType="File" MimeType="Text/Plain"/>
<Document DocID="0000000003" DocType="File" MimeType="Text/Plain"/>
</Documents>
```

Field Data

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Tags>
<Tag TagName="IMAGE KEY" TagDataType="Text" TagValue="ABC-00001" />
<Tag TagName="AUTHOR" TagDataType="Text" TagValue="MJones" />
<Tag TagName="DATE SENT" TagDataType="DateTime" TagValue="12/15/2006" />
<Tags>
</Document>
```

Note:

Eclipse SE Field	EDRM/XML TagDataType
EXTRACTEDTEXT, MEMO, TEXT_TM	LongText
DATE_YMD, DATE_MDY, DATE_DMY	DateTime
NUMERIC	Decimal
[all other types]	Text

Image Keys

CustomDocumentInfo contains "IMAGEKEYS:" followed by the image key for all pages in the document.

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<CustomDocumentInfo>IMAGEKEYS:ABC-00001, ABC-00002, ABC-00003</Custom-
DocumentInfo>
</Document>
```

Review Data

The <Reviews> element contains tags, redactions, and annotations. Eclipse SE uses the ReviewId attribute in the <Review> element to identify the type of Review data:

Document Tag: <Review ReviewId="1">

PageTag: <Review ReviewId="2">

Redaction: <Review ReviewId="3">

Annotation: <Review ReviewId="4">

Document Tags

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Reviews>
<Review ReviewId="1">
<Tag TagName="#DocTag" TagValue="REVIEWED" TagDataType="Text" />
<Tag TagName="#DocTag" TagValue="Redacted" TagDataType="Text" />
</Review>
</Reviews>
</Document>
```

Page Tags

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Reviews>
<Review ReviewId="2">
<Tag TagName="#PageTag" TagValue="ABC-00001|REVIEWED" TagDataType="Text" />
</Review>
</Reviews>
</Document>
```

Redactions

TagValue contains redactionid, categoryid, text, image key, rotation, left, top, right, bottom, modified date/time, modified by user id.

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
</Reviews>
<Review ReviewId="3">
<Tag TagName="#Redaction" TagValue="1,4,Client/Attorney Privilege,ABC-
00001,90,208,151,287,7/1/2009 9:25 AM,rsmith" TagDataType="Text" />
</Review>
</Reviews>
</Document>
```

Annotations

TagValue contains annotation id, image key, rotation, left, top, right, bottom, modified date/time, pixel width, text, annotation type (Highlights, StickyFlag, EmbeddedText, Markup, Clip), color (integer), font name, font size, font style (0=plain), font color (integer), modified by userid, and (for Markup only) markup points. Markup points are delimited with a semi-color character and a pipe character: x1;y1|x2;y2|...|xn;yn.

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Reviews>
<Review ReviewId="4">
<Tag TagName="#Annotation" TagValue="1,ABC-00001,0,102,520,431,604,7/1/2009 9:25
AM,8,some text,StickyFlag,16776960,Arial,9,0,0,rsmith " TagDataType="Text" />
</Review>
<Review ReviewId="4">
<Tag TagName="#Annotation" TagValue="2,ABC-00001,0,0,0,0,0,7/1/2009 9:25 AM,8,
,Markup,16776960,Arial,9,0,0,rsmith,123;56|88;23|12;90|29;124|105;84 " TagData-
Type="Text" />
</Review>
</Reviews>
</Document>
```

Image Files

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Files>
<File FileType="Image">
<ExternalFile FilePath="C:\IMAGES" FileName="001.TIF" Hash="" MergeFileNum="1"
MergeFileCount="1" />
</File>
</Files>
</Document>
```

OCR

InlineContent contains "OCR[image-key]:" followed by page OCR text.

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Files>
<File FileType="Text">
<InlineContent>OCR[ABC-00002]:this is ocr text for a page</InlineContent>
</File>
</Files>
</Document>
```

OCR Word Coordinates

InlineContent contains "WORDCOORD[image-key]:" followed by word coordinate data. Word coordinate data contains image width, image height, rotation, confidence(0-100), and word data. Word data is delimited by a "|" character and contains text, word-left, word-top, word-width, word-height, font-name (optional), font-size (optional). Additional word data can be appended. Word data is separated by a "^" character.

```
<Document DocID="0000000001" DocType="File" MimeType="Text/Plain">
<Files>
<File FileType="Text">
<InlineContent>WORDCO-
ORD[ABC00002]:34,20,0,80,Smith|102|508|59|22^Jones|281|633|58|22</InlineCon-
tent>
</File>
</Files>
</Document>
```

Volume

The last element before the end of the Batch node is the CustomBatchInfo node. Eclipse SE uses this node for volume information.

```
<Batch>
...
<CustomBatchInfo>VOL001,C:\ENRONDATA; VOL002,C:\ENRON2 </Custom-
BatchInfo>
</Batch>
```


Sample EDRM

```
<?xml version="1.0" encoding="utf-8" ?>
  <Root MajorVersion="1" MinorVersion="0" Locale="US" Description="EDRM Compliant
Load
  File" DataInterchangeType="Update" CaselId="SmithVsJones">
    <Batch>
      <Documents>
        <Document DocID="000001" DocType="File" MimeType="">
          <Tags>
            <Tag TagName="DOCKEY" TagDataType="Integer" TagValue="000001" />
            <Tag TagName="IMAGEKEY" TagDataType="Text" TagValue="MSC000001" />
            <Tag TagName="BUILDING" TagDataType="Text" TagValue="HOUSE" />
            <Tag TagName="AUTHOR" TagDataType="Text" TagValue="BSMITH" />
            <Tag TagName="BEGATTACH" TagDataType="Integer" TagValue="" />
          </Tags>
          <Files>
            <File FileType="Image">
              <ExternalFile FilePath="@VOLUME1@" FileName="IMAGE1.TIF" Hash="" MergeFile-
Num="1"
MergeFileCount="1" />
            </File>
            <File FileType="Text">
              <InlineContent>OCR[MSC000001]:OCR TEST FOR PAGE 1</InlineContent>
            </File>
          </Files>
          <Reviews>
            <Review ReviewId="1">
              <Tag TagName="#DocTag" TagValue="HIGHLY CONFIDENTIAL" TagDataType="Text" /
              >
            </Review>
            <Review ReviewId="4">
              <Tag TagName="#Annotation" TagValue="1,MSC000001,0,63,541,743,588,8/6/2010
15:57:09,0,,Highlights,-2130706688,,0,0,0,Eclipse," TagDataType="Text" />
            </Review>
          </Reviews>
          <CustomDocumentInfo>IMAGEKEYS:MSC000001</CustomDocumentInfo>
        </Document>
        <Document DocID="000002" DocType="File" MimeType="">
          <Tags>
```

```

<Tag TagName="DOCKEY" TagDataType="Integer" TagValue="000002" />
<Tag TagName="IMAGEKEY" TagDataType="Text" TagValue="MSC000002" />
<Tag TagName="BUILDING" TagDataType="Text" TagValue="OFFICE" />
<Tag TagName="AUTHOR" TagDataType="Text" TagValue="MJONES" />
<Tag TagName="BEGATTACH" TagDataType="Integer" TagValue="000001" />
</Tags>
<Files>
<File FileType="Image">
<ExternalFile FilePath="@VOLUME1@" FileName="IMAGE2.TIF" Hash="" MergeFile-
Num="1" MergeFileCount="2" />
<ExternalFile FilePath="@VOLUME1@" FileName="IMAGE3.TIF" Hash="" MergeFile-
Num="2" MergeFileCount="2" />
</File>
<File FileType="Text">
<InlineContent>OCR[MSC000002]:OCR FOR PAGE 2</InlineContent>
</File>
<File FileType="Text">
<InlineContent>OCR[MSC000003]:OCR FOR PAGE 3</InlineContent>
</File>
</Files>
<Reviews>
<Review ReviewId="2">
<Tag TagName="#PageTag" TagValue="MSC000003|CONFIDENTIAL" TagData-
Type="Text" />
</Review>
<Review ReviewId="3">
<Tag TagName="#Redaction" TagValue="1,11,REDACTED,MSC000003,0,85,20,
745,181,8/6/2010 15:57:09,Enterprise" TagDataType="Text" />
</Review>
</Reviews>
<CustomDocumentInfo>IMAGEKEYS:MSC000002,MSC000003</CustomDocu-
mentInfo>
</Document>
<Document DocID="000004" DocType="File" MimeType="">
<Tags>
<Tag TagName="DOCKEY" TagDataType="Integer" TagValue="000004" />
<Tag TagName="IMAGEKEY" TagDataType="Text" TagValue="MSC000004" />
<Tag TagName="AUTHOR" TagDataType="Text" TagValue="BJOHNSON" />
<Tag TagName="BEGATTACH" TagDataType="Integer" TagValue="000001" />

```

```
</Tags>
<Files>
<File FileType="Image">
<ExternalFile FilePath="@VOLUME1@" FileName="IMAGE4.TIF" Hash="" MergeFile-
Num="1" MergeFileCount="1" />
</File>
</Files>
<Reviews>
<Review ReviewId="2">
<Tag TagName="#PageTag" TagValue="MSC000004|ATTORNEY EYES ONLY" Tag-
Data Type="Text" />
</Review>
<Review ReviewId="4">
<Tag TagName="#Annotation" TagValue="1, MSC000004, 0, 0, 0, 0, 0, 8/6/2010
15:57:09, 0, this is embedded text
annotation, EmbeddedText, 16711680, 12, 0, 0, Eclipse, " TagDataType="Text" />
</Review>
</Reviews>
<CustomDocumentInfo>IMAGEKEYS:MSC000004</CustomDocumentInfo>
</Document>
</Documents>
<Relationships>
<Relationship Type="Attachment" BEGATTACHId="000001" ChildDocId="000002" />
<Relationship Type="Attachment" BEGATTACHId="000001" ChildDocId="000004" />
</Relationships>
<CustomBatchInfo>VOLUME1,C:\SMITHVVSJONES1;VOLUME2,C:\SMITHVS-
JONES2</CustomBatchInfo>
</Batch>
</Root>
```


Appendix D Adding Images to a Native-Only Case

Introduction

If you have created a large Eclipse SE case comprised of only native files and you also need images (and optionally text), if you have Ipro eCapture, you can use eCapture to create the needed image/text files and then import them into your Eclipse SE case.



NOTE: For small or moderately sized cases, use the Eclipse SE Bulk TIFF feature. See "[Creating Multiple Document Images \(Bulk TIFF\)](#)" on page [9-22](#) for details on native file ingestion.

This appendix presents an overview of the procedure.

Preparation

Eclipse SE:

- Identify the needed Eclipse SE client, case, and documents (entire case, document range, or search set).
- Identify fields to be included in the export.
- Identify a location for exported load files that eCapture can access.
- Ensure that the person who will perform the procedure is a Super or Case Administrator who is familiar with both Eclipse SE Administration and eCapture

eCapture:

- Ensure that eCapture has access to the Eclipse SE files.
- Identify (or create) the needed eCapture client, project, and custodian.

Procedure

To create images for an Eclipse SE native-only case:

Eclipse SE

1. In Eclipse SE Administration's **Case Management** tab, select **Import/Export > Export Data** from the navigation panel.
2. Complete all **Step** tabs to export both .DAT and .LFP files.
See "[Exporting Case Data](#)" on page 8-42 in this guide for details.

eCapture

3. In the eCapture Controller's **Client Management** tab, right-click the project into which the native files will be imported and select **Import Into Project**.
4. Use the eCapture Import Wizard to import the files created in [Step 2](#). Select options that correspond to the Eclipse SE case. For example:
 - Import native files only.
 - Select the Eclipse SE BEGDOC field for the **Linking Key**.
 - For storage, point to the current Eclipse SE location for native files.When completed, a new discovery job is created.
See the *Ipro eCapture Import Wizard Utility Guide* for details.
5. In eCapture, process the discovery job.
To begin, right-click the **Processing Jobs** folder (under the custodian containing the Eclipse SE natives-based discovery job) and select **New Processing Job**.
6. Define and then start the job.
For details on defining and running a processing job, see Chapter 5 of the *Ipro eCapture User Guide*.
7. After the job completes, use the eCapture QC Module to check the job for problems.
For details on checking the processed job, see Chapter 6 of the *Ipro eCapture User Guide*.
8. In eCapture, export the processed job to .DLF and .LFP files.
To begin, in the **Processing Jobs** folder containing the processed Eclipse SE natives-based job, right-click the job processed in [Step 5](#) and select **Export Processed Data**.

-
9. Select options for, then complete the export job. For document numbering, select **Predefined/Use Filename** options to ensure Eclipse SE numbers are maintained.

For details on exporting a processed job, see Chapter 7 of the *Ipro eCapture User Guide*.

Eclipse SE

1. In Eclipse SE Administration's **Case Management** tab, select **Import/Export > Import Data** from the navigation panel.
2. Complete all **Step** tabs to import the .DLF file, then the .LFP file.
3. Notify Eclipse SE reviewers that images (and optionally text) are available in the case.

For details on importing a processed job, see "[Importing Case Data](#)" on page 8-6.

