

# Summation Exporting





# AccessData Legal and Contact Information

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# 1 Introduction

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This document is about creating and exporting production sets for a case. Exporting, in most cases, is performed by the case manager. You need the correct permissions to create and export production sets.

## 1.1 About Production Sets and Exports

When you sort through data, organization remains key to preparing a streamlined set of data to include in a report that is delivered to the attorney for the criminal case, civil case, or corporate authorities for a corporate security case. To prepare data for the final report, you can create production sets of filtered data that you can export to various formats.

After applying labels to the evidence set, you can create a production set. A production set is the final output.

When you create production sets, you can only use one label per set.

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**Note:** Production set records cannot be labeled. Creating a production set results in new items being created, these resulting items, cannot be labeled.

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See [Export Tab](#) on page 10.

See [Exporting Production Sets](#) on page 26.

The following table describes the export formats that you can use for your production sets.

### Export Formats

Format	Description
AD1	Creates an AD1 forensic image of the documents included in the Export Set. AD1 is a forensic file format that integrates with FTK. An AD1 contains the logical structure of the original files and the original files themselves. The AD1 file is hashed and verifiable to ensure that no changes have occurred to it.
Image Load File Export	Converts the native documents to a graphic format such as TIFF, JPG, or PDF. It creates a load file in the IPRO LFP or the Opticon OPT formats. This is similar to Load File Export except that it does not contain any metadata.
Native Export	Exports the native documents in their original format and optionally rendered images into a directory of your choosing. This export does not provide a load file.



## Export Formats (Continued)

Format	Description
Load File Export	<p>Exports your choice of Native, Filtered text (includes the OCR text that was created during processing), rendered images of the native document, and optionally OCR text of the rendered images.</p> <p>If the recipient intends to use third-party software to review the export set, select Load File Export.</p> <p>You have the option of exporting rendered documents in the following formats:</p> <ul style="list-style-type: none"><li>• Concordance</li><li>• EDRM (Electronic Discovery Reference Model) XML</li><li>• Generic</li><li>• iCONNECT</li><li>• Introspect</li><li>• Relativity</li><li>• Ringtail (flat file)</li><li>• Summation eDII</li><li>• CaseVantage</li></ul> <p>Some programs have load file size limits. If needed, you can split load files into multiple files.</p> <p>If you use the Concordance, Generic or Relativity exports, and include rendered images, you will also get an LFP and OPT file.</p>

## 1.2 Export Tab

The Export tab on the Home page can be used to export or delete production sets and view the history.

### Export Tab

The screenshot shows a window titled "Production Set History" with a search bar at the top. Below the search bar, there is a list of production sets. Each entry includes a green status bar on the left, followed by fields for Stage, Item, Status, Job Name, Description, Started, Completed, Elapsed Time, and buttons for Export and Delete. The status for all entries is "CreationCompleted".

Stage	Item	Status	Job Name	Description	Started	Completed	Elapsed Time	Export	Delete
		CreationCompleted	AgiProd1		1/1/0001 12:00 AM	2/15/2012 2:51 PM	17629142:51:26	Export	Delete
		CreationCompleted	AgiProd1_Native		1/1/0001 12:00 AM	2/17/2012 8:10 AM	17629184:10:03	Export	Delete
		CreationCompleted	AgiProd2		1/1/0001 12:00 AM	2/15/2012 2:59 PM	17629142:59:29	Export	Delete
		CreationCompleted	AgiProd2_Image		1/1/0001 12:00 AM	2/17/2012 8:23 AM	17629184:23:34	Export	Delete
		CreationCompleted	AgiProd3_Native_Redact		1/1/0001 12:00 AM	2/17/2012 9:21 AM	17629185:21:40	Export	Delete
		CreationCompleted	AgiProd3_NativeOnly		1/1/0001 12:00 AM	2/15/2012 3:06 PM	17629143:06:29	Export	Delete
		CreationCompleted	keiths	abc	1/1/0001 12:00 AM	2/21/2012 4:23 PM	17629288:23:22	Export	Delete
		CreationCompleted	TestProd	Test ProductionSet	1/1/0001 12:00 AM	2/21/2012 6:45 PM	17629290:45:10	Export	Delete

### Export Tab Elements

Element	Description
Production Set History Search Field	Enter text to search by production set name.
Production Set List	Lists the production sets and the status of the production sets.
Export Button	Click to export the production set to a load file.
Delete Button	Click to delete the production set.

## 2 Creating Production Sets

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When you create a production set, you include all of the evidence to which you have applied a given label. After you create the production set, you export the set to an AD1 image file, an image load file, a native export, or a load file.


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**Note:** Once you've created a production set you cannot add documents to that set even if you use the same labels. You will need to label the additional documents and then create a new set using the same label.

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Case managers with the Create Production Sets permission can create production sets.

### To create a production set

1. Before you create a production set, be sure you have applied at least one label to evidence files that you want to filter into the export set.
2. Log in as a user with Create Production Set rights.
3. Click the **Case Review**  button next to the case in the *Case List*.
4. In the *Case Explorer*, select the **Explore** tab, right-click the *Production Sets* folder, and select **Create Production Set**.
5. See [Production Set General Options](#) (page 11) for information on how to fill out the options in the General Options screen.
6. Click **Next**.
7. See [Production Set Files to Include Options](#) (page 13) for information on the option in the Files to Include screen.
8. Click **Next**.
9. In the *Columns to Include*, click the right arrow to add a column to the production set and the left arrow to remove a column from the production set. You can rearrange the order of the columns by clicking the up and down arrows.
10. Click **Next**.
11. See [U.S. Volume Document Options](#) (page 15) for information on the options in the *Volume Document Options* screen.
12. See [Production Set Image Branding Options](#) (page 22) for information on the options in the Image Branding Options screen.
13. In the Summary screen, review the options that you have selected for the production set and click the Edit (pencil) button if you want to make any changes.
14. Click **Save**.

After your production set is created, it will appear in the *Export* tab of the *Home* page and under the *Production Sets* folder in the *Case Explorer* of the *Case Review*.

## 2.1 Production Set General Options

The following table describes the options that are available on the **General Options** screen of the production set wizard.

See [Export Tab](#) on page 10.

## Production Set General Options Screen

General Options

Files To Include

Columns To Include

Volume Document Options

Image Branding Options

Summary

Set the name, description, and select the folder.

Production Set Options

Name

Label

Description

Templates

Template Name	Template Created
Template1	12/27/2011

Save as Back Next Save Cancel

## General Export Options

Option	Description
Name	Enter the name of the production set job you are creating. This does not need to be a unique name, but it is recommended that you make all names unique to avoid confusion.
Label	Select the label that has the documents you want to include in the production set.
Description	Enter a description for the production set if desired.
Templates	Select a template to populate all the fields of the production set wizard using the options selected in a previous production set.

## 2.2 Production Set Files to Include Options

The following table describes the options that are available on the *Files to Include* screen of the production set wizard.

See [Export Tab](#) on page 10.

### Production Set Files to Include Screen

### Files to Include Options

Option	Description
Include Text Files	Select this to include all filtered text files in the production set. This does not include redacted text. This will not re-extract text from native files.
Include Native Files	Select this option if you want to include the native documents with the production set. This will only include native files that have not been redacted. If the native file has been redacted, a pdf of the file will be included.
Output Email in Archives	Select this option if there are emails that were originally in a PST or an NSF format and you want to put them into a PST or NSF container.
Output Email as HTML	Select this option if there are emails that were originally in a PST or NSF and you want to make them HTML files.
Output email as MSG	Select this option if there are emails that you want to make into MSG files.
Include Rendered and Redacted Images	Select this option to include images that have been created in the Case Review. Additionally, if an image has not yet been created, this option will convert the native document to an image format.

## Files to Include Options (Continued)

Option	Description
Excluded Extensions	Enter the file extensions of documents that you do not want to be converted. File extensions must be typed in exactly as they appear and separated by commas between multiple entries. This field does not allow the use of wild card characters. The default values are: EXE, DLL, and COM
File Format	Select which format you want the native file converted to: <ul style="list-style-type: none"> <li>• <b>Multi-page</b> - one TIFF image with multiple pages for each document.</li> <li>• <b>PDF</b> - one PDF file with multiple pages for each document.</li> <li>• <b>Single Page</b> - a single TIFF image for each page of each document. For example, a 25 page document would output 25 single-page TIFF images.</li> </ul>
Compression	<ul style="list-style-type: none"> <li>• <b>CCITT3 (Bitonal)</b> - Produces a lower quality black and white image.</li> <li>• <b>CCITT4 (Bitonal)</b> - Produces a higher quality black and white image.</li> <li>• <b>LZW (Color)</b> - Produces a color image with LZW compression.</li> <li>• <b>None (Color)</b> - Produces a color image with no compression (This is a very large image).</li> <li>• <b>RLE (Color)</b> - Produces a color image with RLE compression.</li> </ul>
DPI	Set the resolution of the image. The range is from 96 - 1200 dots per inch (DPI).
Produce color JPGs for provided extensions	This and the following two options are available if you are rendering to CCITT3 or CCITT4 format and allows you to specify certain file extensions to render in color JPGs.  For example, if you wanted everything in black and white format, but wanted all PowerPoint documents in color, you would choose this option and then type PPT or PPTX in the <b>To JPG Extensions</b> text box. Additionally, you can choose the quality of the resulting JPG from 1 - 100 percent (100 percent being the most clear, but the largest resulting image).
To JPG Extensions	Lets you specify file extensions that you want exported to JPG images.
JPG Quality	Sets the value of JPG quality (1-100). A high value (100) creates high quality images. However, it also reduces the compression ratio, resulting in large file sizes. A value of 50 is average quality.
OCR TIFF Images	Creates a page by page OCR text file from the rendered images. By default, the text file uses a TXT extension. As a best practice, you would not create both Filtered Text files and OCR text files. However, if you do both, the Filtered Text files use a TXT extension and the OCR text files use an OCR.TXT extension. If you create only OCR text files and not Filtered Text files, the OCR text files use a TXT extension.

## Files to Include Options (Continued)

Option	Description
OCR Text Encoding	<ul style="list-style-type: none"><li>• <b>ANSI</b> - Encodes text files using ANSI. ANSI encoding has the advantage of producing a smaller text file than a Unicode file (UTF). ANSI-encoded text files process faster and save space. The ANSI encoding includes characters for languages other than English, but it is still limited to the Latin script. If you are exporting documents that contain languages written in scripts other than Latin, you need to choose a Unicode encoding form. Unicode encoding forms contain the character sets for all known languages.</li><li>• <b>UTF - 16</b> Encodes load files using UTF-16.</li><li>• <b>UTF - 8 (Default)</b> Encodes load files using UTF-8. For more information on the Unicode standard, see the following website <a href="http://www.unicode.org/standard/principles.html">http://www.unicode.org/standard/principles.html</a></li></ul>
Redactions Markups	Check the Markup Sets that you want included in the production set. Markups will be burned into the images that are created.

### 2.2.1 U.S. Volume Document Options

This section describes the options available in the Volume Document Options screen of the production set wizard if you have US numbering enabled. US numbering is default. The following table describes the options available in the following screen.

Production Set Volume Document Options Screen US Numbering

General Options

Files To Include

Columns To Include

Volume Document Options

Image Branding Options

Summary

Naming Options

File Name

Doc Id

Volume Partition Sorting

Name

Is Ascending

Sorting Options

Doc ID Numbering

Sorting Options

Partition Type

MegaByte

Partition Limit

4000

Prefix

Volume Starting Number

1

Padding

6

Folder Limit

1000

Sample

000001

Folder

Prefix

Suffix

Starting Number

1

Padding

6

File Limit

1000

Native Folder

Natives

Image Folder

Images

Text Folder

Text

Sample

000001

Document

Save as



Back

Next

Save

Cancel

Volume Document Options Screen

Option Type	Option	Description
Naming Options		Choose a naming option:
	DOCID	(Default) This file naming allows you to determine what the name of the files will be, based on the document ID numbering scheme. This option is used with the <i>Document Numbering Options</i> on this tab. In Case Review, you can view the DocID that is created for exported files. This is useful in associating an exported file with the original file.
Volume Partition Sorting		You can sort the documents before they are converted and named. This allows you to choose one or more metadata field values to sort the documents in ascending or descending order. You can choose any combination of fields by which to sort, however, it is not recommended to choose more than 3 fields to sort by.
	 (Volume Partition Sorting)	Add volume partition sorting filters based on specified ascending or descending fields.
	 (Volume Partition Sorting)	Delete the selected sorting option.
	Sorting	Specify the order that the files are listed in each volume. Sorting occurs on the parent document. For example, you might sort by <b>Ascending</b> on the field <b>FILESIZE</b> . In such case, the first volume contains the largest file sizes, and the last volume contains the smallest file sizes.
	Field	Set the column heading by which you want to sort.



## Volume Document Options Screen (Continued)

Option Type	Option	Description
	Add	Add the sorting options that you have selected. You can add one or more sorting filters.
Volume Sample		Provide a sample of the volumes.
Volume Options		Select a volume folder structure for the output files. The selections will determine how much data is put into each folder before a new folder is created and the folder structure in which the output is placed. See <a href="#">About the U.S. Volume Structure Options</a> on page 19.
	Partition Limit	Set the size of the partition based on the partition type that you have selected.
	Prefix	Specify the prefix-naming convention you want to use for the root volume of the production set.
	Starting Number	Set the starting number of the first partition in the production set.
	Padding	Specify the number of document counter digits that you want. The range is 1 to 21. 0 padding is not available.
	Folder Limit	Create a new numbered volume when the specified folder limit is reached inside the volume.
Folder		Lets you name and limit the size or the number of items that are contained in a folder. An export can have one or more folders.
	Prefix	Specifies the prefix-naming convention that you want to use for the folders within the volume of the export.
	Suffix	Specifies the suffix-naming convention that you want to use for the folders within the volume of the export.
	Starting Number	Sets the starting number of the first folder within the volume of the export.
	Padding	Specify the number of document counter digits that you want. The limit is 21.
	File Limit	Creates a new numbered folder when the specified file limit is reached inside the folder.
	Native Folder	Lets you set the name of the <b>Natives</b> folder.
	Image Folder	Lets you set the name of the <b>Image</b> folder. See <a href="#">Files to Include Options</a> on page 13.
	Text Folder	Lets you set the name of the <b>Text</b> folder where text files go that are generated by the OCR engine. See <a href="#">Files to Include Options</a> on page 13.
Document		
	Numbering Options	See <a href="#">About U.S. Document Numbering Options</a> on page 20.
	Prefix	Specifies the prefix-naming convention that you want to use for the document and page numbering within the folders of the export.

## Volume Document Options Screen (Continued)

Option Type	Option	Description
	Suffix	Specifies the suffix-naming convention that you want to use for the document and page numbering within the folders of the export.
	Starting Number	Sets the starting number of the first folder within the volume of the export.
	Padding	Specify the number of document counter digits that you want. The limit is 21.
	Continue from last used number	<p>Lets you have sequential numbering across all exports per legal matter.</p> <p>Sets <b>Starting Number</b> to the last document number plus 1 from the last export.</p> <p>In order to enable this, you must also enable the <i>Use Last Document Number</i> option in the export default settings.</p>

## 2.2.1.1 About the U.S. Volume Structure Options

You can specify the volume folder structure for the output files. The selections will determine how much data is put into each folder before a new folder is created and the folder structure in which the output is placed.

See [U.S. Volume Document Options](#) on page 15.

The output files will be contained within the following hierarchy:

- **Volume folder** - Contains two levels of subfolders for organizing the files. A new volume will be created when a specified limit is reached.

You can choose from the following limits.

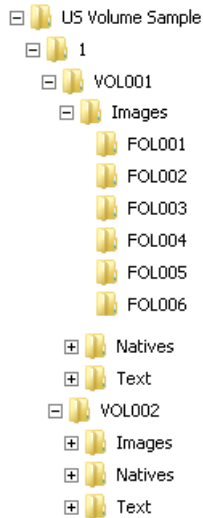
### Limits

Limit	Description
Documents	Output will be placed into a volume until the specified number of documents has been reached, then a new volume will be created. For example, if you export 2000 files and you set the partition limit to 1000, you will have two document volumes.
Images	Output will be placed into a volume until the specified number of images has been reached, then a new volume will be created. This option is useful because a single, large document may create one image per page.
Megabyte	Output will be placed into a volume until the specified megabyte size of all of the files has been reached, then a new volume will be created. For example, you can set a partition limit of 4000 MB if you intend to burn the files to DVD media.
Single	All output will be placed into one volume.

You can also specify a volume folder limit. In order to prevent issues with Microsoft Windows Explorer, you can specify an additional limit of the number of folders in a volume. This works in addition to the selected limit type. If the specified volume limit is not reached, but the folder limit is, a new volume will be created.

- **File type folder** - The first level subfolders within each volume are separated by the file types of the exported files. By default, the folders are named by file type, for example, native documents, images, or text files.
- **Level 2 folder** - The second level folders contain the actual files being exported. You can specify a limit of the total number of files per folder. This limit, once reached, will create a new folder within the same file type folder until the volume maximum or number of folders has been reached.

Using the *Partition Type*, *Partition Limit*, and *Folder limit* values together, you can create the volume structure that meets your needs. The following graphic is an example of a volume structure.



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**Note:** No document that has been rendered will have its rendered pages divided into more than one folder.

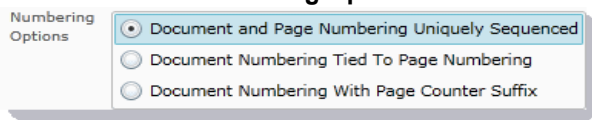
---

## 2.2.1.2 About U.S. Document Numbering Options

If you have chosen to use a DocID naming scheme for the output files, you can specify the method for creating Doc IDs. This section describes the Numbering options found in the Volume Document Options screen of the Production Set wizard.

See [U.S. Volume Document Options](#) on page 15.

### Production Set Numbering Options



You will choose from the document numbering options:

- **Document and Page Numbering Uniquely Sequenced**

This option generates a sequential number that is applied to the document without regard to the rendered pages that may or may not be produced. The images will also be numbered sequentially without regard to the document number.

For example, if you have two documents each that produce two images during conversion, the output would be:

#### Example Output

Native Documents	Image Output
ABC00001.doc	ABC00001.tif
	ABC00002.tif
ABC00002.doc	ABC00003.tif
	ABC00004.tif

You can optionally specify a prefix- and a suffix-naming convention.

- **Document Numbering Tied to Page Numbering**

This option generates a sequential number for every page created. The corresponding document name will be the same as its first page generated for each document.

For example, if you have two documents each that produce two images during conversion, the output would be::

#### Example Output

Native Documents	Image Output
ABC00001.doc	ABC00001.tif
	ABC00002.tif
ABC00003.doc	ABC00003.tif
	ABC00004.tif

You can optionally specify a prefix- and a suffix-naming convention.

- **Document Numbering with Page Counter Suffix**

This option generates a sequential number for every document and the pages produced for that document will carry the document's name with a counter as a suffix that represents which page is represented by the image.

For example, if you have two documents each that produce two images during conversion, the output would be:

#### Example Output

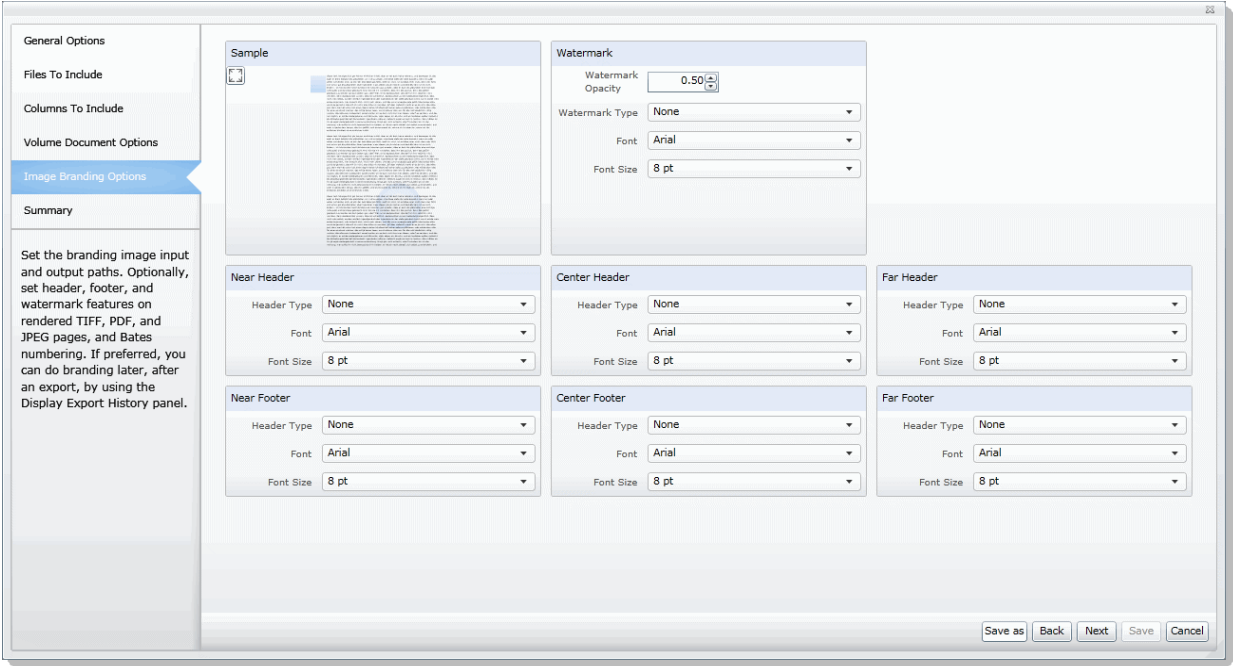
Native Document	Image Output
ABC00001.doc	ABC00001.001.tif
	ABC00001.002.tif
ABC00002.doc	ABC00002.001.tif
	ABC00002.002.tif

## 2.3 Production Set Image Branding Options

You can brand the rendered pages of TIFF and PDF images with a header, footer, watermark, or Bates numbering from the Production Set wizard.

See [Export Tab](#) on page 10.

### Image Branding Screen



### Image Branding Options

Option Group	Options	Options	Description
Sample			Displays a sample of the image branding options selected.
Watermark			Set options to brand a watermark to the middle of the document.
	Opacity		Sets the visibility of the watermark text.
Watermark/ Header/Footer Type			There are multiple types of image branding available. The options in the Watermark, Header and Footer groups will differ depending on the Type that you select.
	None		No branding on the image.

## Image Branding Options (Continued)

Option Group	Options	Options	Description
	Bates		<p>Turns Bates numbering of rendered image pages on or off.</p> <p>Bates numbering is a term used for placing an identifying number on every page of evidence files that are presented in court.</p> <p>If you create a production set of evidence files with the setting to produce multi-page TIFF images or PDF files, the TIFF or PDF file name is the Bates number of the first page of the document, which is known as the BegDoc (beginning document) number.</p> <p>Bates numbering is not driven by the document or page numbering that was assigned in the <i>Volume/Document Options</i> panel.</p>
		Prefix	<p>Specify up to any 25 alphanumeric characters except the forward slash or backward slash.</p> <p>You can use a separator to create a visual break between the different sections of the Bates number.</p>
		Starting Number	Sets the starting number to a value from 1-100.
		Padding	Specify the number of document counter digits that you want. The limit is 42.
		Font	Sets the font style for the text.
		Font Size	Sets the font size for the text.
	Doc ID		Displays the Doc ID in the designated location.
		Font	Sets the font style for the text.
		Font Size	Sets the font size for the text.
	Field		Displays the selected field value in the designated location.
		Field	Select one of the available fields to display in the designated location.
		Font	Sets the font style for the text.
		Font Size	Sets the font size for the text.
	Global Endorsement		Displays the entered text in the designated location.
		Text	Enter the text that you want to appear in the designated location.
		Font	Sets the font style for the text.
		Font Size	Sets the font size for the text.
	Page ID		Displays the page ID number in the designated location.
		Font	Sets the font style for the text.

### Image Branding Options (Continued)

Option Group	Options	Options	Description
		Font Size	Sets the font size for the text.



## 2.4 Additional Production Set Options

### 2.4.1 Saving Production Set Options as a Template

After configuring the production set options, you can save the settings as a template. The template can be reused for future production sets with the current case or other cases.


To save options as a template

1. Access the production set wizard and set the options for the production set.  
See [Export Tab](#) on page 10.
2. In the production set wizard, click **Save As**.
3. Enter a name for the template.
4. Click **Save**.

### 2.4.2 Deleting a Production Set

Users with production set rights can delete production sets from Case Review.


**To delete a production set**

1. Log in as a user with Production Set rights.
2. Click the **Case Review**  button next to the case in the *Case List*.
3. In the *Case Explorer*, select the **Explore** tab, expand the *Production Sets* folder, right-click the production set that you want to delete and select **Delete**.
4. Click **OK**.

### 2.4.3 Sharing a Production Set

Users with production set rights can share production sets that they have created with other groups of users.

**To share a production set**


1. Log in as a user with Production Set rights.
2. Click the **Case Review**  button next to the case in the *Case List*.
3. In the *Case Explorer*, select the **Explore** tab, expand the *Production Sets* folder, right-click the production set that you want to delete and select **Manage Permissions**.
4. Check the groups that you want to have access to the production set that you created and click **Save**.

## 3 Exporting Production Sets

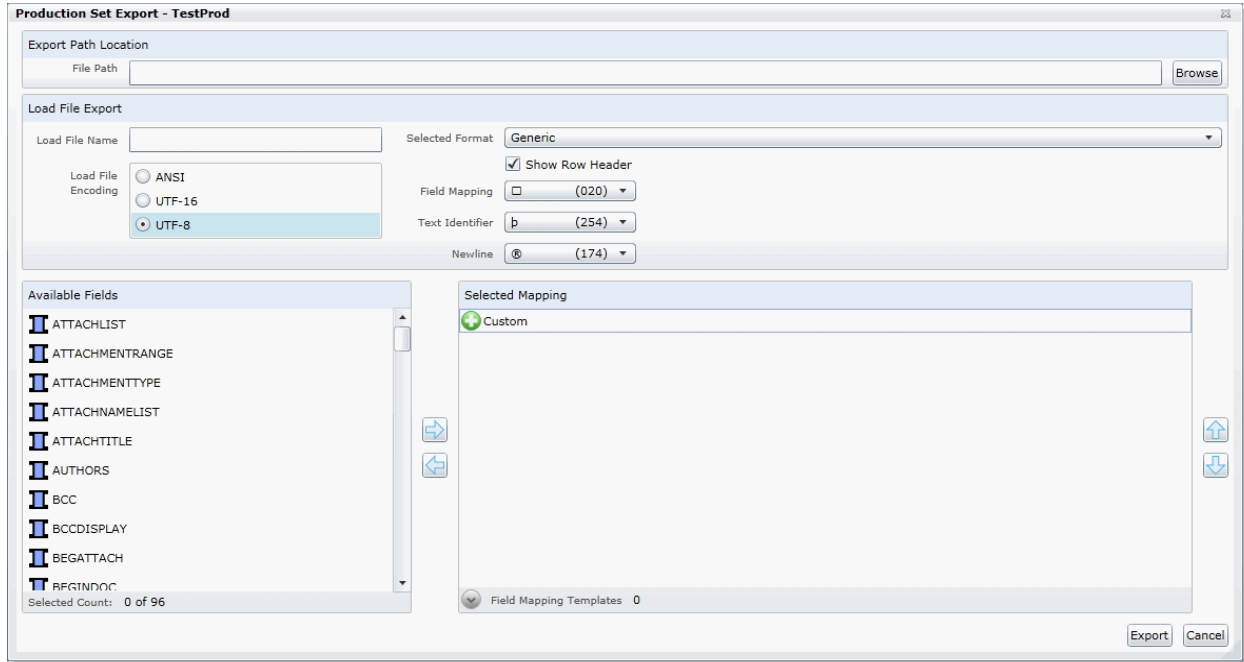
### 3.1 Exporting Production a Set

After you create a production set, you can export it containing only the files needed for presentation to a law firm or corporate security professional.

#### To export a production set

1. On the *Home Page*, select a case and click the  **Export** tab.
2. Next to the production set that you want to export, click **Export**.

#### Production Set Export Dialog



The screenshot shows the 'Production Set Export - TestProd' dialog box. It has a title bar with the text 'Production Set Export - TestProd' and a small icon on the right. The dialog is divided into several sections. At the top is the 'Export Path Location' section with a 'File Path' text box and a 'Browse' button. Below this is the 'Load File Export' section, which includes a 'Load File Name' text box, a 'Selected Format' dropdown menu set to 'Generic', a 'Load File Encoding' section with radio buttons for 'ANSI', 'UTF-16', and 'UTF-8' (the latter is selected), a 'Field Mapping' dropdown set to '(020)', a 'Text Identifier' dropdown set to 'b (254)', and a 'Newline' dropdown set to '@ (174)'. There is a checkbox for 'Show Row Header' which is checked. Below the 'Load File Export' section is the 'Available Fields' list on the left, containing items like ATTACHLIST, ATTACHMENTRANGE, ATTACHMENTTYPE, ATTACHNAMELIST, ATTACHTITLE, AUTHORS, BCC, BCCDISPLAY, BEGATTACH, and RFGINDOC. Below this list is a 'Selected Count: 0 of 96' label. To the right of the 'Available Fields' list is a 'Selected Mapping' section with a 'Custom' mapping selected. At the bottom right of the dialog are 'Export' and 'Cancel' buttons.

3. Enter or browse to the path where you want to save the export.
4. Enter a name for the Load File.

5. Select a format that you want to use for the export. The following formats are available:
  - **CaseVantage** - Generates a DII file specifically formatted for use with the AD Summation CaseVantage program.
  - **Concordance** - Generates a DAT file that can be used in Concordance.
  - **EDRM** - Generates an XML file that meets the EDRM v1.2 standard.
  - **Generic** - Generates a standard delimited text file.
  - **iCONNECT** - Generates an XML file formatted for use with the iConect program.
  - **Introspect (IDX file)** - Generates an IDX file specifically formatted for use with the Introspect program.
  - **Relativity** - Generates a DAT file that can be used in Relativity.
  - **Ringtail (flat file)** - Generates a delimited text file that can be converted to be used in Ringtail.
  - **Summation eDII** - Generates a DII file specifically formatted for use with the AD Summation iBlaze or Enterprise programs.

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**Note:** If you are outputting a Concordance, Relativity, or Generic load file, and include rendered images, you will also get an OPT and LFP file in the export directory.

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6. Depending on the load file format you choose, you may need to check whether or not to show the row header for the columns of data. The Show Row Header option is only available for the following load file formats:
  - Concordance
  - Generic
  - Introspect
  - Relativity
  - Ringtail (Flat File)
7. Select an option for Load File Encoding. The following options are available:
  - **ANSI** - Encodes load files using ANSI (for text written in the Latin script).

ANSI encoding has the advantage of producing a smaller load file than a Unicode file (UTF). ANSI-encoded load files process faster and save space. The ANSI encoding includes characters for languages other than English, but it is still limited to the Latin script.

If you are exporting documents that contain languages written in scripts other than Latin, you need to choose a Unicode encoding form. Unicode encoding forms contain the character sets for all known languages.
  - **UTF-8** - (Default) Encodes load files using UTF-8.

For more information on the Unicode standard, see the following website:  
<http://www.unicode.org/standard/principles.html>  
Most commonly used for text written in Chinese, Japanese, and Korean.
  - **UTF-16** - Encodes load files using UTF-16.

Similar to UTF-8 this option is used for text written in Chinese, Japanese, and Korean.
8. Select a **Field Mapping** character. This delimiter is the character that is placed between the columns of data. The default delimiters are recommended by the program to which the load file was intended. However, you can change these defaults by selecting the drop-down and choosing an alternative.

**Field Mapping** is available for the following load file formats:

  - Concordance
  - Generic
  - Introspect
  - Relativity
  - Ringtail (Flat File)

9. Select a **Text Identifier** character. This delimiter is the character that is placed on either side of the value within each of the columns. All of the text that follows the character and precedes the next occurrence of the same character is imported as one value.  
The default delimiters are recommended by the program to which the load file was intended. However, you can change these defaults by selecting the drop-down and choosing an alternative. If you do not wish to use a delimiter, you can choose the (none) option.  
**Text Identifier** is available for the following load file formats:
  - Concordance
  - Generic
  - Introspect
  - Relativity
  - Ringtail (Flat File)
10. Select a **Newline** character. This is a replacement character for any newline (carriage return/line feed) character. The default delimiters are recommended by the program to which the load file was intended. However, you can change these defaults by selecting the drop-down and choosing an alternative. If you do not wish to use a delimiter, you can choose the (none) option.  
**Newline** is available for the following load file formats:
  - Concordance
  - Generic
  - Introspect
  - Relativity
  - Ringtail (Flat File)
11. Select the **Available Fields** of metadata to be included in the load file and click the right arrow to add the field.
12. Some load file applications require that certain fields be in the load file. In such cases, you can click the Custom plus button to add a custom field entry that is not already listed in the **Available Fields** list.
13. Click **Export**.