How to Export Data Out of Case Logistix

The purpose of this document is to create an efficient workflow which outlines the export process from Case Logistix (CLX) to a format that can be loaded into Thomson Reuters eDiscovery Point.

These steps require tools located in the Case Logistix Dashboard as well as in the Case Logistix Administrator tool. If you do not have access to these or if you need assistance with any steps in this document, please contact LMS Support for assistance.

(800) 364-9853
select option 1, or email
clxhelp@thomsonreuters.com

CLX EXPORT STEPS

The first step in this process is to decide which CLX matters need to be exported.

There are several scripts that can be run via the Westlaw Case Logistix (WCLX) Administrator Tool to show library size, document counts, presence of notes or redactions, and other scenarios that could lead to additional steps.

The WCLX Administrator Tool is typically installed on the SQL server as well as some CLX admin user machines. You can access it via the start menu under All Programs > Westlaw Case Logistix

When launched, you will see a list of all the CLX libraries your user account has access to.

This tool should always be run using an account that is a CLX administrator so you see all the libraries.

To get to the scripting console, click on the Central Databases tab at the top, you will see this:

If the server name and user info is not populated, you must fill it in and click Connect. Once you click Connect, you should see the name of the Case Logistix Central database in the middle of the screen. Click on the database name and then click the Ad-Hoc Reporting button on the bottom left.

After clicking Ad-Hoc Reporting, you should see this screen with a list of all the CLX libraries in the window on the left:

To run the scripts, you need to execute them one at a time by clicking the Select All button on the left, pasting the query text into the Report SQL window on the right, and then clicking Run on the right. This will give you a list that can be exported to a CSV file by clicking on the Save button on the bottom right.

Below is a list of scripts that can be run to check on your Case Logistix environment. You must run them individually and you should save the results of each as you go. The comments above each script include an uppercase name that you can use to save them for convenience. **If you need assistance running these scripts, please contact LMS Support.**

ENVIRONMENT ANALYSIS SCRIPTS:

```
-- LAST NON-ADMIN LOGIN
-- Use this via the Administrator Tool
-- Shows the library, user and date for the last login
-- by a non-administrator
-- It ignores logins from users in the Administrator workgroup
select top(1) Username, MAX(LoginDate) from User_UserLogging where UserGUID not in
(select UserGUID from tblSecurityGroupUsers where SecurityGUID =
(select SecurityGUID from tblSecurityGroup where Name = 'Administrators'))
group by Username
order by MAX(logindate) desc
```

```
-- LAST USER LOGIN
-- Use this via the Administrator Tool
-- It returns the last login for ANY user (admin or not)
select top(1) Username, MAX(LoginDate) from User_UserLogging
group by Username
order by MAX(logindate) desc
```

```
-- LIST FILE EXTENSIONS
-- Use this via the Administrator Tool
-- Gives a list of all file extensions and a count of docs for each
select count(*) as Docs, (RIGHT(tblDocuments.[filename], CHARINDEX('.', REVERSE(tblDocuments.[filename])) - 1)) as Extension
from tbldocuments where filename is not null and Filename like '%.%' group by (RIGHT(tblDocuments.[filename], CHARINDEX('.', REVERSE(tblDocuments.[filename])) - 1))order by (RIGHT(tblDocuments.[filename], CHARINDEX('.', REVERSE(tblDocuments.[filename])) - 1))
```

```
-- COUNTS AND DATA SIZE
-- THIS ONE COULD TAKE SOME TIME TO COMPLETE
-- Use this via the Administrator Tool
-- this shows the Document Count, Size of the Documents Folder and number of files.
SELECT @@(CLXDocCount), @@(CLXDocSize)

-- TOTAL REDACTED Documents
-- Use this via the Administrator Tool
-- It returns the number of documents that have redactions on them
select COUNT(distinct(docguid)) DocsWithRedactions from tblRedactions

-- TOTAL REDACTIONS
-- Use this via the Administrator Tool
-- It returns the total number redactions across all redacted documents
select COUNT(*) TotalRedaction from tblRedactions

-- TOTAL DOCS WITH NOTES
-- Use this via the Administrator Tool
-- It returns the number of documents that have notes on them
select COUNT(distinct(docguid)) DocsWithNotes from tblNotes

-- TOTAL NOTES
-- Use this via the Administrator Tool
-- It returns the total number of notes across all documents
select COUNT(*) TotalNotes from tblNotes

-- POSTBACK OR NATIVE LINKS
-- Lists the field that are set as hyperlink editors
-- If fields are setup that way, they may have been used to hold the path to production copies or Native copies of a document
SELECT e.Name 'Editor', i.FieldName HyperLinkField
FROM tblEditorItems AS i INNER JOIN tblEditors AS e ON i.EditorGUID = e.GUID
where EditorType =8 order by e.Name, i.FieldName

-- MISSING FILENAME
-- This will show if you have records in CLX where there is no filename at all
select [doc #] 'Docs Missing Filename', Filename from tblDocuments where Filename is null
order by [Doc #]

-- NO FILE EXTENSION
-- List Doc #'s for filename without an extension. These cause issues with CaseProduction
select [doc #] 'Docs No file extension', Filename from tblDocuments where Filename not like '%.%'
order by [Doc #]

-- TAGS WITH SEMICOLON
-- Lists the names of tags containing semicolons and count of docs affected
-- Semicolons are used for delineating multiple values and need to be corrected before exporting the data
select COUNT(*), IssueName from tblDocIssues d, tblIssues i where d.IssueGUID = i.IssueGUID and i.IssueGUID in (select IssueGUID
from tblIssues where IssueName like '%;%')
group by IssueName
```

-- TAGS NOT SHARED WITH EVERYONE
-- This lists tags that are not available to all users. Only tags available to user running the production will be exported
-- These tags would be private user tags or shared with a specific workgroup
   select IssueName TagName from tblissues where (WorkgroupGUID is not null or userguid is not null) and IssueName not like '--%'
   order by IssueName

WHAT TO DO WITH THESE RESULTS:

1 The 2 LAST LOGIN scripts are there to assist you in deciding if a case may still be active or not, and if it needs to be migrated.

2 LIST FILE EXTENSIONS will show if a case contains TIFF Image Lists or not. If not, then we can do a simple native export of the data. If so, then we either need to produce those as images, or perform steps to swap the TIFFs with their markups to produce natively. You should contact LMS Support for additional detail regarding swapping markups for tiffs if interested in that approach.

3 COUNTS AND DATA SIZE will give you the size of the Documents folder for the CLX library. It counts all files in that folder, native, markup and OCR text if present. This would be slightly larger than the data set you will export if you have created those files.

4 TOTAL REDACTED DOCUMENTS will give you the total number of docs that contain redactions. It is up to you how you want to deal with these. If there is a small number of docs, you could export them natively without redactions, and then reapply the redactions in eDiscovery Point after the data has been loaded. Another option is to choose to burn in the redactions at the time of export. If you do this, you would not have the unmarked native file anymore unless you ran them in another separate production.

A report can be run to provide more details for redactions by pasting the query below in either SQL Management Studio or the WLCX Administrator tool:

```
select [Doc #], AnchorPage "Page", AnchorText "RedactionCode", COUNT(*) "NumberOfRedactions" from tblredactions r,
tblDocuments d where r.DocGUID = d.DocGUID
group by [Doc #], AnchorPage, AnchorText
```

5 TOTAL DOCS WITH NOTES will show how many records have notes applied. You can export notes using the Document Notes Report on the Admin Dashboard Tools page in CLX. If you don't have the CLX Dashboard installed, there is a custom Notes Report you can run in SQL Server Management Studio. These would require additional steps to overlay into eDP.

If you cannot run the notes report from the CLX dashboard, you can review this document which would allow you to customize the notes report and run it in SQL Management Studio.


CustomNotes Report.doc

6 POSTBACK or NATIVE LINKS are fields that would point to a full UNC path on your network. Typically, these would be used to show the produced copy of a document or the native file if the image version was loaded in as well. These require manual steps to export since they are not the actual documents being referenced by the CLX viewer. You should contact LMS Support for additional detail/ investigation.

7 MISSING FILE NAME shows records in CLX that don't point to a document. This could be due to the file being missing upon load, or if the record was intentionally created to just store metadata. If there are less than 1000 of these in your CLX library, you can still import the exported set into eDP and it will create placeholder images for the missing files. If you have more than 1000 records in a CLX library that are missing a filename, you could copy over a placeholder file into your library's Documents folder, then update the Filename value for all the blank ones to point to that file. You should contact LMS Support for additional detail/investigation.

When you produce the file out, there is a setting to change in CaseProduction to allow it to continue when it hits the same file for more than one record.

In CaseProduction, click Tools > Options and then be sure that the box shown below is unchecked under Dashboard Settings.

8 NO FILE EXTENSION will show files that don't contain a period anywhere in the name. When these are produced out natively, the reference in the loadfiles will add the period to the end of the Nativefilename. For example, if the file associated with document number 100 in CLX was just called ABC (no file extension) and we produce this file and name it after the Document # in CLX, the output file would be named 100 while the reference in the loadfile would be: \VOL1\Natives\0001\100.

You must remove the period in the loadfile for those records. If there are lots of instances in a library, Professional Services has tools to manipulate the values by column and could correct the file. If there are only a few, then it is easy to just edit the file in a text editor and find the records based on the Doc #'s from the report results.
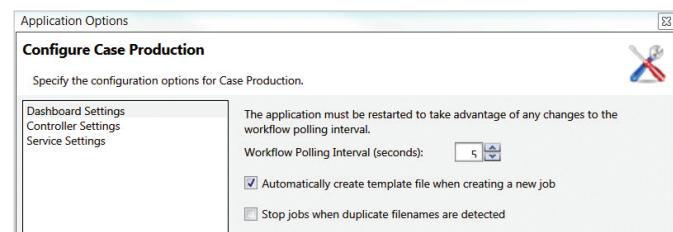
9 TAGS WITH SEMICOLON will list tag names that contain semicolons. If you are exporting tags in the loadfiles, they will have semicolons that delimit the list of tag values for each document. If a name contains a semicolon, it will throw off the list of tags. This can be corrected by right clicking on the tag name and selecting Properties, then changing the tag name to replace or remove the semicolon and click OK.
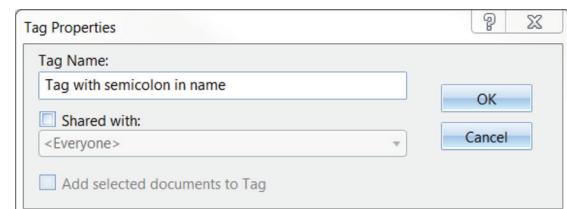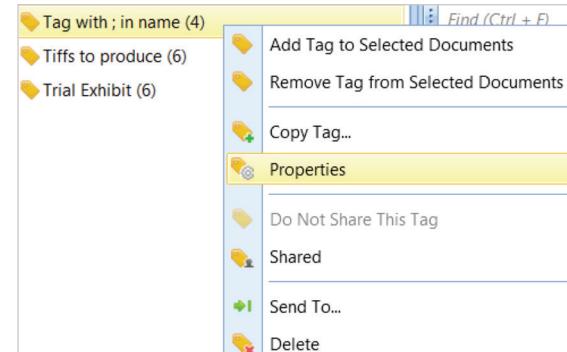
10 TAGS NOT SHARED WITH EVERYONE shows tag values that may not get exported in your loadfile. The only tags that will come out are the ones that are shared globally or with the user who is running the production. If another user has created a private tagand you need than info included in your loadfile, you will need to change how the tags are shared. You can change all tags in your library to globally shared tags with this script if desired. You can run this in the WCLX Administrator tool, or via SQL Server Management Studio.

```
-- changes all tags except internal dashboard tags to gobally shared
UPDATE tblIssues set UserGUID = NULL, WorkgroupGUID = Null
WHERE UserGUID is NOT NULL or (WorkgroupGUID is NOT NULL and IssueName NOT LIKE '--%')
```

RUNNING CASEPRODUCTION:

When you are ready to produce, you will need to decide which fields need to be included in your loadfiles. There is a tool on the Dashboard that will provide a report showing all fields and if they have data in them or not.

Log into the Case Logistix matter and access the Admin Reports dashboard. Click on the 'Field Populated & Null Count Report' and then export the values to excel. You can now filter the list down to remove records with 0 in the Populated Count column. You can then decide if you want to include the remaining fields in your loadfile export.

If you cannot get this report from the dashboard, you can run a SQL query in SQL Server Management Studio and it will generate the same info. You can either run FieldPopulatedNullCount-OneLibrary.txt and select the CLX database you want to run it against, or run FieldPopulatedNullCount-AllLibraries.txt which will give a report across all your CLX libraries. You can save this as a CSV and then filter to the library you need and the fields you want.

Now that you know the fields you need in your load file and have dealt with data issues from the other reports, it's time to produce the documents.

Open CaseProduction and connect to the library you want to export. Select All Documents. If you see the message about Null Page Counts, it is OK if we are producing all documents Natively.
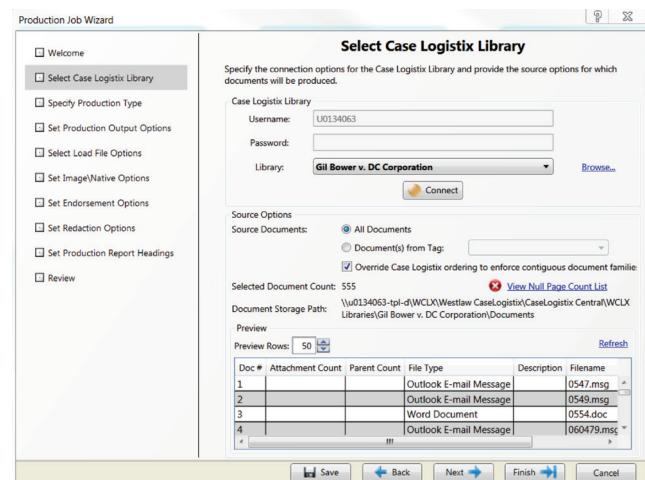
For the Bates Numbering and File Naming, you can assign a unique prefix on the Set Production Output Options screen. This example is for the Gil Bower v. DC Corporation library. The naming selected uses GBvDC_ as the prefix followed by 0000001. The default option is to use this same numbering as the Image Filename.
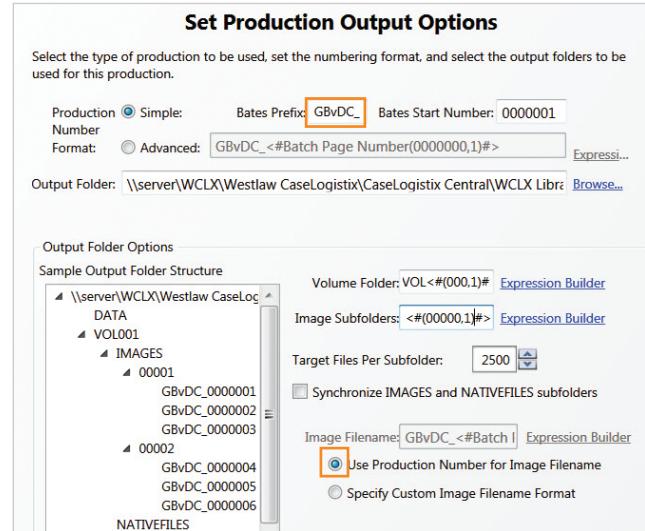
On the Select Load File Options screen, enter all the field names you require based on running the Field Populated and Null Count Report. In addition to those fields, you will also include fields that are generated during the production such as <#Starting Production Number#>, <#Image Filename#> (if producing images), <#Native Filename#>, and <#ParentID#>. One last field that is not part of the Field Populated and Null count report is Tags. Be sure to include Tags in your load file if you want to bring that coding over. We suggest selecting a Concordance load file as the load file format.

Set Image\Native Options.

If you do not have any Tiff Image List files in the library, then you will export all files as Native only (you may do some as images if you are burning in redactions). You can set all extensions to produce Native files by checking the box at the top of the list of file extensions and then selecting Produce Native from the dropdown. This will set those same options for every file extension in the list.
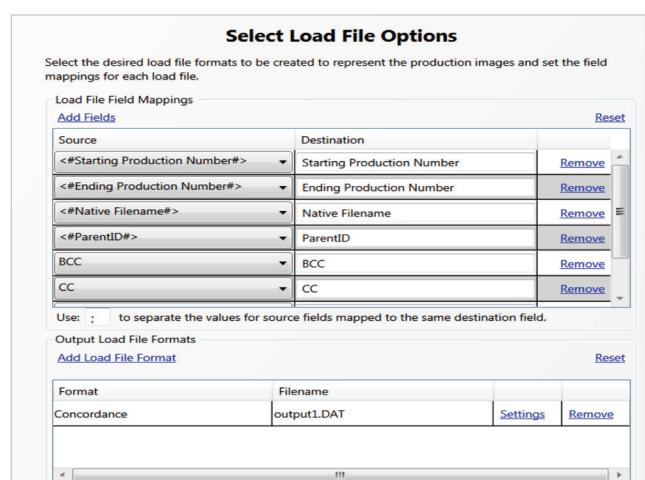
OCR is not needed when going from CLX to eDP. If OCR is required for another tool, you would check the OCR box. Note that CaseProduction can extract OCR from office files, but does not generate it for image files. That would have been done prior to loading into CLX or in CLX using the OCR tool.
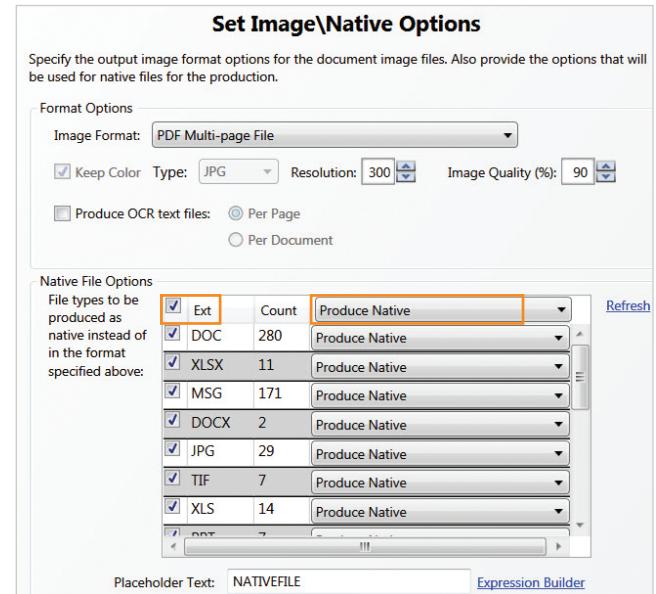
If your library contains Tiff Image Lists, you can produce those (along with TIF and JPG extensions) as Images and select the PDF option. All other file types would be produced as Placeholder and Native. To set those types to produce as images you just uncheck the boxes next to their extensions in the list.
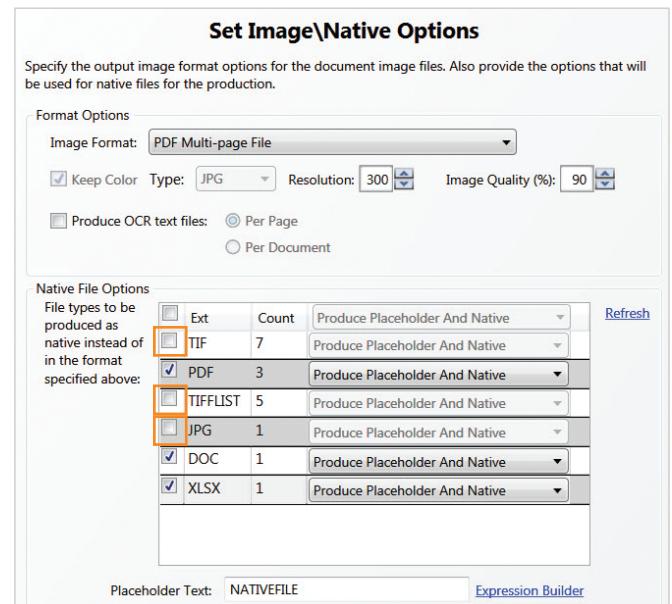
Set Endorsement Options should be left blank since we want the files exported as is.
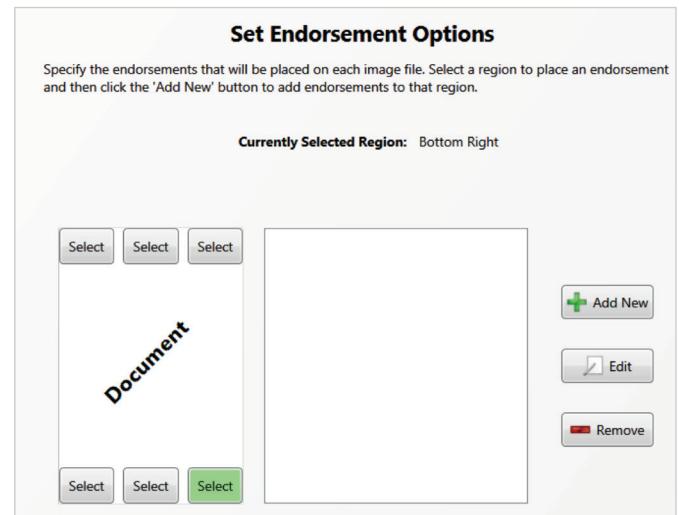
Set Redaction Options can either include or exclude the redactions. This will be a personal preference for your data. If you check the box next to the redaction codes, the docs containing redactions will be produced as images instead of native files. The redaction will be permanently burned into the document that you export. If you do not check any box next to the redaction code, the files will be produced natively without any redactions. You could manually add those redactions in eDP after the data has been migrated. A redaction report could be run to show which pages of the documents have redactions in CLX.

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