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Review: LexisNexis Concordance 2007

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TechnoScore: 4.6

1 = Lowest Possible Score; 5 = Highest Possible Score

law.lexisnexis.com/concordance

INTRODUCTION

Concordance 2007 is the first LexisNexis release of the venerable document-review database. The slick new look and significant improvements in its tagging interface, email import, and conduits to other major litigation software products should help it maintain its place at the head of the legal-software pack.

I was provided with the "mobile" version of the software and did most of my testing on a laptop with a modest 1 GB of memory, Pentium 4, 2.8 GHz, and Windows XP Professional SP2. Installation remains simple and quick. The file and registry paths differ from those of Version 8, therefore you can safely install both versions on the same computer.

The most noticeable change in Concordance 2007 is the new look. LexisNexis completely redesigned the icons and many of the menu items and the new context-aware navigation pane will help anyone familiar with Microsoft Outlook feel right at home. The new interface makes it easy for someone with basic computer skills and no exposure to Concordance or other review software to get started with the program quickly.

THE NAVIGATION PANE — GIVING YOU WHAT YOU MOST COMMONLY NEED, WHEN YOU MOST LIKELY NEED IT

The new navigation pane offers a dashboard interface with a number of "task panes" that appear and disappear depending upon whether you have a database open. Each pane is divided into "panels," which further organize the options available to you or provide context-specific information. Inactive task panes collapse into a stack of rectangular task buttons, which, like Outlook, can be further minimized into a thin row of small icons at the bottom of the navigation pane. You can also collapse the panels within the task panes to make more room for other panels.

The navigation pane can be hidden, undocked, or moved to the right, top, or bottom of the program window. Although you can dock the navigation pane to the top or bottom, it is rather pointless to do so. The panes are designed to display the menu items vertically and do not reformat themselves for horizontal viewing when docked to the top or bottom.

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As useful as the navigation pane is, it is not customizable. You can neither hide any of the task panes within the navigation pane nor create new ones — you are stuck with the defaults. Non-subscribers to LexisNexis's Total Litigator service or its other software cannot remove Total Litigator task pane.

It is also important to be aware that you cannot apply user permissions directly to the navigation pane interface. Several security settings for the

menu items do not apply to the same functions in the navigation pane. This prevents locking down certain program functions, including the following commands: open database, most recently used databases list, concatenate database, restore/save snapshot, all search functions, and sort.

IMPROVED TAGGING

Tags are now viewed and applied in the "tags" pane and the new "notes" pane provides a quick view of any issue tags, notes, or attachments that have been applied to the document you are viewing without having to click on the highlighted text. One of the best new tagging features is that you can now organize your tags into folders and subfolders. This is a blessing for those who manage large teams of reviewers. In the past, with multiple review stages, you could end up with an unwieldy list of tags that reviewers would have to scroll through. Database administrators had to resort to all manner of kludges to make the tagging more user friendly, for example prefixing tags with numbers or special characters to order and group them and using fields instead of tags to hide them from users who did not need to see them.

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There are two kinds of tag folders: public and personal. Personal folders and the tags they contain are only viewable by the user who created them. Two features of tag folders that I particularly like are: (1) the folder name text that turns to bold whenever a tag within it is checked for the document you are viewing and (2) the ability to run a query on all tags in a folder. A tag-folder query performs an "OR" search on all tags within the folder.

Two other welcome new tag-related features are "tag history" and "tag statistics." The tag history panel enables you to see who added and deleted

what tags and when and the tag statistics panel provides tag counts organized by tags and by user. The results of both can be filtered by date. These features provide a rudimentary productivity view and help you quickly notice unusual activity and statistical outliers. (Hmm ... Mr. Jones has tagged over a thousand documents from a custodian in marketing as privileged, whereas most reviewers have found only two or three.)

As happy as I am with tag folders, I do wish that it were easier to manage them. Once you create a tag or folder, it cannot be renamed or moved from one folder to another. It would be helpful if the manage tags/issues interface were updated to support some way to organize and rename existing tags and folders, including drag-and-drop functionality. Also, folders are ordered among unfoldered tags alphabetically. I wish all folders could be listed together at the top or bottom of the tag list.

As for the tag history and statistics panels, I would like the ability to right-click or double-click on a tag count result and run a query on it. This would make these new features even more valuable to quality-assurance reviewers and supervisors. Finally, I would also like to be able to limit tag statistics and history access to specific users.

THE NEW WORKSPACE: TABS & SPLIT-SCREEN VIEW

One of the most frustrating behaviors of older versions was the inability to open multiple databases in the same instance of the software. Opening a database in Version 8 closes the database you are in. Concordance 2007, thankfully, addresses this limitation with its new tabbed workspace. This enables the user to open multiple databases in the same instance of Concordance, each in its own tab. Reorder the tabs in Concordance 2007 by clicking on and dragging the tab to where you want it. You can pull down a list of all open tabs by clicking on an arrow at the far right of the tab bar. Switch to an open database by clicking on its tab or by selecting its order number from view menu.

I was also happy to find that the split-screen view now supports dividing the workspace left and right as well as top and bottom. This works particularly

well with wide screens. I especially prefer splitting the browse and table views left and right so that I see more items listed in the table view.

EMAIL THREADING

With this new version, Concordance finally enables you to import and easily navigate attachments with their parent email messages. During the import, Concordance 2007 loads the attachment directly into the database and makes a copy of the attachment outside of the PST. The Email import wizard is nearly identical to that in Version 8, but has an improved dialog box for field mapping that uses a datasheet view to accommodate the additional fields needed for the imported attachments. Also new is the ability to auto-number the imported email and documents, with the parent's document number given in the records of all child attachments.

In the resulting database, the attachments appear immediately after their parent documents. The ATTACHMENT field is placed as the first field and contains the subject line for the parent email and the titles of any attachments. In both the browse and edit views, the parent-child relationship is represented graphically. The names of the parent and attachments are hyperlinked to the records in the database itself. Attachments have an additional FILEPATH field that is hyperlinked to the native-file copy that Concordance made during the import.

The new Email and Attachments database is not backwards compatible. While Version 8 will open it and even display the email thread, it will not cross-link items within the family.

SEARCHING & SORTING

The new "simple search" form is immediately accessible to anyone who has used Google's advanced search form and makes it easy for the novice to conduct full-text searches without having to know anything about Concordance's search operators and rules. All of the advanced search features are still available and easily accessible from the search pane.

Concordance 2007 revamps the interface for sorting the database. In the new version, the sort

option is no longer accessible as a menu item, standard bar button, or the F8 hotkey. The database is now sorted from within the sort task pane. Double-clicking in the "available fields" panel will move that field to the "sort by" panel above. You need to click the available fields in the order you want to sort by because, once they are in the sort panel, you cannot reorder them.

One improvement in the sort interface is that you can change whether you will sort on a field by ascending or descending order after you have selected it. This enables you to select all your fields first and later set each field's sort order, which you could not do in Version 8. After selecting the fields, simply click the "sort" button. As in prior versions, the sort is temporary and does not affect other users.

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VIEWING IMAGES

Viewing images requires Concordance Image or a third-party viewer, such as IPRO View. Concordance Image v. 4 is simply Opticon v. 3 with a new name. It does offer improved image-loading speeds when used with FYI Reviewer and the ability to batch-send an entire query to Sanction, but these improvements certainly do not seem to warrant a new major version number. Concordance Image will work with Version 8 and Opticon 3 will work with Concordance 2007.

This is my only real disappointment with this release of Concordance. It is high time that the image viewer be integrated into Concordance's user interface. Launching images in a new window is inconvenient and a common end-user complaint. Increasingly, the attorneys and paralegals conducting document reviews have experience working with a number of online review platforms, which generally displays the image within a view pane in the same window

as the tool bars and tagging panes. Concordance should provide similar convenience.

MENUS, PREFERENCES, & SECURITY SETTINGS

The text menu is mostly the same, but a number of items have been renamed, moved, or removed. There is a completely new "view" menu, which includes tab numbers for keyboard tab navigation and the "documents" menu now includes navigation buttons. The preferences interface is easier to navigate. Whereas the preferences menu in Version 8 is a forest of twelve gray tabs arranged in three rows, Concordance 2007 reorganizes the configuration and opens into six categories.

An interesting new feature hidden away in the "Edit" menu is "Copy Document Data." This enables the user, while in browse mode, to select the contents of one or more fields and send it to the clipboard, create a new text file, or append it to a new text file. Another new feature hiding in the edit menu is "format", which changes the case of selected text to uppercase, lowercase, or first letter of every word. Global edit is now "global replace" and you can no longer run a global replace operation on a blank target.

> The new "simple search" form is immediately accessible to anyone who has used Google's advanced search form.

Overall, the changes to the menus are an improvement. I would, though, like to see a few more changes in the next version. To start with, the administrative features were not updated. Specifically, I would like more user-friendly password management. For new users of Concordance, password management is like a hidden-rules game. To change your password you need to type the old password, a forward-leaning slash, and the new password (old/new) in the password field of the login dialog box. There is nothing on the dialog box

that tells you about this. Yes, there is a line about this on page 65 of the manual, but how hard is it to provide a "change password" button?

Especially needed is an easier way to assign initial passwords to users. Currently, to create a new user, you have to set the password when that user first logs in. You cannot create or change the password from within the security-preferences menu. To avoid creating a security hole, the administrator needs to create the new users and then close the database and log in as the user, set the password, and repeat for each user. It's a real pain in the password.

Similarly, the interface for creating or modifying the database has not changed. I was hoping that this version would finally provide a drag-and-drop interface or arrow buttons for reordering fields. Alas, no. The user still has to "delete" a field, click on the field the "deleted" field needs to appear above, and then "insert" the "deleted" field. At the very least, the developers should rename the "delete" button "cut," which more accurately indicates its function.

INTEGRATION WITH OTHER LEXISNEXIS AND THIRD-PARTY PRODUCTS

Having been acquired by LexisNexis, the new version more tightly integrates with popular litigation support applications and services offered by LexisNexis and it further improves upon its support of a number of third-party applications. The "Total Litigator" task pane includes links to many of LexisNexis' online services as well as conduits for CaseMap, TimeMap, and TextMap.

Right-clicking on highlighted text gives the option to send it to Total Litigator, CaseMap, or Sanction. Sending it to Total Litigator launches that service's "Search by Source" page in your Internet Browser. This is a convenient way to perform quick background research on companies, law firms, and attorneys whose names might appear in the documents being reviewed. The search will run without a subscription, but a subscription is required to retrieve documents. LexisNexis has upgraded the CaseMap and Sanction conduits in Version 2007 so that you can now send not only specific docu-

ments and text clips, but all records in an active query.

TECHNICAL SUPPORT AND SERVICE

I experienced no problems with this software requiring technical support. I do use LexisNexis for legal research and have used their technical support for its other software products in the past. I've always found its customer support and training to be superb. My one complaint is that getting pricing information was more complicated than it should be, requiring several days and a couple emails back and forth. LexisNexis does not provide price sheets for Concordance by email or on its Web site.

CONCLUSION

I give Concordance 2007 a TechnoScore of 4.6 out of 5. It is a powerful and stable desktop database that will continue to be favored by litigation-support professionals for internally-hosted document and transcript reviews. While database administrators will appreciate some of the new features, the real beneficiaries are the attorneys and paralegals who review and markup the data. Despite aspects of

the interface that could use some finishing touches, the improvements in this version are significant. Tag folders, personal tag folders, a simpler search interface, and easier access to common tools all make Concordance 2007 a more pleasant tool to work with and greatly lowers the learning curve for new users.

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