Remote Review Revisited

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Periodically in this space, I have discussed remote access to Concordance (see December 2008 Tip Sheet, February 2010 Tip Sheet, and March 2012 Tip Sheet at http://www.uslegalsupport.com/concordance-archive/). We live, work and litigate in a more distributed world. Cases are larger. Discovery can be enormous. There are regional counsel, co-counsel, and experts to account for. Most document review platforms released in the past decade use a browser interface either predominantly or exclusively in order to facilitate distributed review.

And yet there is still Concordance.

Concordance Classic is still a local network-based or individual PC Windows (so-called “Fat”) software application. This means that, while an individual or a local team can fully and collaboratively review all Concordance documents and data, some cobbling is required to invite outsiders to the party.

Without re-addressing some of the more technical commentary, this seems a fitting time to re-examine alternatives available to cases where pure hosted Web applications seem to be overkill and a strong Concordance culture exists. While Concordance Evolution has arrived, as an explicitly enterprise-focused application it falls into the overkill category for purposes of this discussion.

Method One: FYI (whatever that might mean)

As I have previously discussed, LexisNexis (taking up from Dataflight‘ s 2004 initial release) addressed the remote access question with an Internet gateway, FYI Concordance Server, which creates an application-level virtual private network (VPN) addressable either via the Web (Internet Explorer-based) FYI Reviewer, or using Concordance to open an .FYI link file rather than a .DCB. In either case, the
**Concordance** data stays on the server (where the processing work gets done), the session is encrypted, and the path between user and data is as straight as it gets. This tool allows **Concordance** databases to be hosted at a datacenter and accessed by anyone with an Internet connection and the Internet Explorer version 8 or 9 Web browser with the **FYI Reviewer** plug-in.

In the FYI scheme, you build a normal **Concordance** database, and get to review it in the **FYI Reviewer** web tool, which looks like a simpler version of the **Concordance** 9.x or 10.x interface. Image viewing is built in, or it can send the image to your **Concordance Image** or **Ipro** or **Native Viewer**. Searching, tagging, coding, sorting, all work pretty much as you’d expect. As you also might expect, it’s a pretty pricey piece of software, but once licensed, there is no limit to the amount of data that can be addressed over the subscription term. The package includes five **FYI Reviewer** licenses.

**Method Two: Citrix**

Then there is **Citrix-hosted Concordance**. Citrix (which is actually the name of the company, not the software product) has been around quite awhile now; in a sense, it is a “Back to the Future” technology, creating secure terminal sessions sharing the resources of a Windows server in much the same way as old IBM 3270 terminals hooked up to mainframes.

When you log on to a Citrix session, you may get a second desktop (actually created on the Presentation Server, with your permitted programs and data published on that server) or a remote application link. Either way, the programs and data stay on the server side, and only screen refreshes and keyboard/mouse commands cross the wire in the normal course of things.

There are several benefits to this approach:

1. Internet bandwidth requirements are kept to a minimum.

2. Here too, data never crosses the wire, only keyboard/mouse input and the screen rendering of results.

3. One can use the full **Concordance** program, so users with sufficient skills and permissions can load data, produce data, modify the database, run CPLs, and basically do the administration hands-on rather than describing what is needed to a hosting firm’s administrator.
4. In the case of an electronic document (native file only) database, the native files are opened on the server and do not cross the wire, with uncomplicated, seamless access to *Concordance Native Review*.

5. Citrix features highly secure and granular access to information under the control of a (usually) qualified administrator.

This last goes hand-in-hand with the fact that a full Citrix implementation costs quite a pretty penny in software, hardware and staffing. On the other hand, Citrix can be used with all the firm’s applications, not just *Concordance*.

**Method Three: LogMeIn and the Like**

In recent times, I have found *LogMeIn* ([www.logmein.com](http://www.logmein.com)) to be an increasingly popular way for small and medium-sized firms to set up *ad-hoc* or even long-term access to *Concordance* data assets. There are several considerations commending this approach:

- The basic version, which is limited to remote access, is free. (File transfer, among other capabilities, is available for a modest monthly or annual fee.)
- Here too, the data never leaves the host site, and all processing remains local; only screen information and keyboard/mouse instructions cross the wire.
- Supports clipboard copy and paste between local and remote desktops.
- More platform-independent than the alternatives.

However:

- Unlike Citrix, where a Presentation Server can provision 25-50 sessions (depending upon licensing and setup), a computer or workstation needs to be assigned to a single LogMeIn access.
- The Windows access account used for the LogMeIn system must be strictly defined so that only the necessary *Concordance* case data are exposed, not any other firm work product. Remember, the remote user has all the rights and access of a network user.
- LogMeIn is secured by the Secure Sockets Layer (SSL) key encryption standard. It’s decent, and widely used. If the case is extremely sensitive, you may want to consider the cost/benefit of using a more secure platform such as those set out above.
Persistent Considerations

Just to complete the picture, here are the questions that don’t go away just because you’ve dismissed outside hosting and decided to run everything from inside your own operation:

- **Can your firm host the storage capacity required by the current case?**
  Consider the database, images, native files, text, load files, plus space for backups, temp files, exports, productions, and additional discovery.

- **How many users will actually be reviewing, managing, or quality checking the data?**
  **Is your licensing for concurrent (any # at a time) users adequate?**
  One tip for local administration is to have a copy of Concordance Mobile Edition on the administrator’s workstation so that he or she can load, quality check and produce without taking up a concurrent network license.

- **How well are you set up for management, including user access, tag issues, regular backup, database structure modifications, indexing and packing?**
  The latter three items require exclusive access to the database, as does setting Security. Maintenance windows are generally set after normal business hours.

- **Are you able to provide support for all hours that it might be required?**

  I have also heard advice from Concordance Support about having everyone enter a database via Citrix, as opposed to mixing Citrix and LAN access, in order to avoid possible latency or corruption; I have not personally tested this advice. The idea is to avoid corruption of data, and particularly Tags.

  In summary, be realistic about the requirements and value of the case. You have options, but weigh all the issues before you reach your conclusion.

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The Concordance Tip Archive (all the way back to October 2005!) has a new home on our Web Site at [http://www.uslegalsupport.com/concordance-archive](http://www.uslegalsupport.com/concordance-archive). Feel free to
leave me a note, a comment, a suggestion or a Tip request. While you’re there, don’t miss our Resources page, which lists the Tip Sheet Archive and our current CLE offerings (http://www.uslegalsupport.com/litigation-services/resources/), and of course, check into all the other great things U.S. Legal Support can do for you….

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