

CT Summation iBlaze

Discovery Management and the Core Database



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Discovery Management

- Paper/Imaged Discovery
 - Document Indexing is a breeze!
 - Data entry tools
 - F5, Lookup Tables, Tags
 - Data entry in Form or Column view
 - Can customize form data entry screen for any case
 - Don't like indexing/data entry?
 - Works seamlessly with ALCoder for auto coding OCR'd documents directly into your Summation database
 - Import/load data from your favorite coding vendor/other counsel
- Multiple tables
 - Can connect them, similar to Concatenation
 - Search across multiple tables

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Electronic Discovery/Native File Review

- Load directly into Summation
 - PST/NSF files/Other native files
 - Docid assigned
 - Link to original maintained
 - Text extracted (15 file types)
 - Metadata extracted
 - Parent/Child established for emails/attachments
 - Review natively or as extracted text
 - Print
 - Produce natively
 - Limited petrification capabilities
- Enhanced loading of vendor-processed EDD/ESI
 - eDII



Searching

- Full text searching
 - Transcripts
 - OCR
 - Extracted text from native files
 - Database, in combination with other items to search
- Boolean Searching
 - Database
- Intelliparse
 - Combines single field Boolean search of the database and a full text search of checked item(s)
- Fuzzy Searching
 - Transcripts
 - OCR
- Tally





Images

- Document review tricks
 - F11: Full screen
 - While in full screen mode
 - W: Fit to width/F: Fit to full page
 - F8: Next record/F7: Previous record
 - R: Turn right/L: Turn left
 - Page Up: Next page/Page down: Previous page
 - V: Invert image (aka reverse image colors)
- Dual screen
 - Undock image (Float View), then drag to second screen
- Useful markup tools
 - Redaction
 - Can change color, text, text color
 - Can show or hide as necessary
 - Can print or not



Producing/Sharing Documents

- Briefcasing
 - Where renumbering is not necessary, such as documents already Bates'd, for an expert or for co-counsel not using Summation
- Document Production Tools
 - Where renumbering is necessary, where documents are not already Bates'd, or
 - When the tracking mechanisms Summation kicks in are desired, or
 - When needing to produce a PST file (from a native review)
- Send to Excel
- Export
 - Summaries
 - Images
 - OCR text files
 - DII file





Testimony Management

- Transcripts Folder
 - Load depo, hearing, trial transcripts
 - Grouping
 - Full-text searching across transcripts
 - Notes/Annotations for the hot cites
 - Rapid-fire digesting
 - Designation capabilities
 - Highlight testimony, just like paper (v2.9 or later)!
 - Hyperlink exhibits
 - Among other hyperlink capabilities



Fact Management

- Chronology of Events (Events table)
 - What happened, when
 - Link directly to testimony and documents that support facts
 - Special properties
 - Can operate like any other Summation table as *Core Database*
- Core Database works directly with CaseMap
 - Right-click on summary number: Send to CaseMap
 - Two choices
 - Add as Object
 - Add as Fact





General Case Management

- Contact List
 - *People Table*
- Case Document Index
 - *Pleadings Folder*
- Scratch Paper
 - *Case Organizer*



Trial Prep

- Works with both TrialDirector and Sanction for ease of preparing for trial
 - For TrialDirector, has enhanced functionality for transfer of documents/exhibits
 - For Sanction, has right-click capabilities
 - Export summaries to either program
 - Export images and OCR for import into either program





About Bob Meyers

- Bob Meyers is an award-winning trainer based out of Denver, Colorado
- Mr. Meyers has worked in a law firm environment, a service bureau environment and on his own working with law firms, corporate law departments and government agencies around the world since 1994.
- Mr. Meyers also trains the following software:
 - Sanction II
 - LiveNote
 - CaseMap/TimeMap
 - TrialDirector (certified)

