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From: Michelle Kovitch [kovitch@lmtsupport.com]
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Litigation Management Technologies "For the Record"



Greetings!

Was one of your New Year's resolutions to use Summation more proficiently? We can help! Since our last newsletter, CT Summation released iBlaze 2.9.1 and Enterprise 2.6 with additional enhancements. I've been busy too; the 2nd Edition of *Summ it Up* is finished!

In this Newsletter, we'll debate the Pleadings Component of the Summation Case Explorer Tree and identify if it is a fit for your case. Another featured article outlines the workflow of the transcript highlighting tool and you'll continue to benefit from our regular series of Frequently Asked Questions.

I want to be your Summation **"EVERYTHING"** - your go to person for training, webinars, pre-recorded eSeminars and software solutions ~ we've got it all!

If you find this helpful, please forward it to a colleague. Enjoy!



Summation Pleadings Folder

As you begin to build the case and draft the Complaint, correspondence, initial Discovery Requests or other documents created in-house, utilize CT Summation's Pleadings component. While the term pleading is used herein as a general term including all of the above examples, it usually pertains just to the documents that are filed with the court. The Pleadings folder identified on the Case Explorer Tree, allows the documents that have been created in-house to become a searchable part of the CT Summation database without

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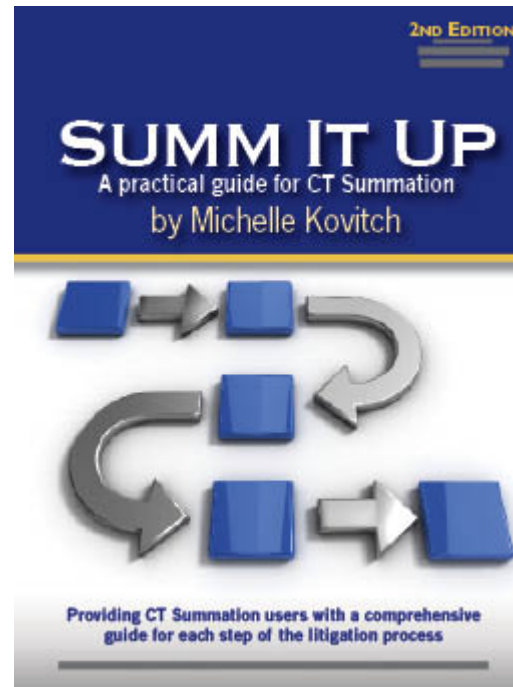
Summ it Up, 2nd Edition

the need of actually loading the documents into the database as you would with images. The Pleadings component just "points" to the directory path where the documents are saved on the shared server within the firm. However, as documents are created in-house someone must be designated to periodically Blaze the Pleadings. This function indexes the words in the newly created documents and adds them to the vocabulary list allowing them to be searchable within Summation.

Many firms have implemented a document management system which provides tools for storing documents created in-house in a uniform, organized manner. In some cases, the Pleadings Component is unable to point to a particular directory path where the documents are stored in a document management system and as such, the pleadings component cannot be utilized. If your firm uses a document management system, check to see if it allows you to point to a directory path.

Let us take this one step further and think about this from another perspective. If you have located a document created in-house by searching them via the Pleadings component on the Case Explorer Tree, you may ultimately need to see the signed, stamped, filed copy of the pleading. A signed copy represents it was the final version of the document and is also the copy provided to opposing counsel referred to as a service copy. The stamp appearing on the document confirms it was the actual copy filed with the court. Now let's consider the attorney that has taken a copy of the case from the shared network and copied it onto the laptop to work remotely. Once the laptop is unplugged from the network, the attorney working remotely can no longer search the Pleadings component because it is not connected to the shared network.

In these instances, you should determine if it is appropriate to have the pleadings actually loaded into the CT Summation database. Identify key pleadings, correspondence, discovery orders, etc., and then image them. These key documents that were created in-house can be dropped into CT Summation's Core Database. Thus, an actual service copy



The 2nd Edition of *Summ it Up*, AVAILABLE February 12, 2009! With special focus on LG Gold, iBlaze 2.9.1.1 and Enterprise 2.6. Forty additional pages of tips and tricks. Spiral bound for easy reference!

Find out more and reserve your copy at info@lmtsupport.com

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For customized on-site training contact kovitch@lmtsupport.com or 678/467-6624.

Register Now for Atlanta's CT Summation "Free" User Group, February 18th.

Discuss matters with other end users and form the agenda to meet your needs by submitting topics to: kovitch@lmtsupport.com

Admission is based on availability and seating is limited to one representative per firm. Please join us! **Atlanta User**

of the pleading can be retrieved which also allows the user to have the pleadings accessible when they are working on a copy of the database remotely. Consider using an alphabetical prefix such as PLD as part of the numbering scheme for these documents. The unique numbering scheme will make it clear to the reviewer that the document was not exchanged as discovery but was a document filed with the court. This will also make it easy to search and pull out just the pleadings in the database.



All clients purchasing CT Summation software or upgrades through Litigation Management Technologies receive a copy of *Summ it Up*, 2nd Edition.

LMT Partners with CT Summation for Monthly eSeminars

Recently, we started a monthly eSeminar series with CT Summation, "CT Summation's Best Kept Secrets." If you didn't make it, you can listen to the recorded session here [CT Summation's Best Kept Secrets](#)

The series will continue monthly and will focus on a variety of topics. You can register directly from CT Summation's web. Our next eSeminar is scheduled for February 26th.

Transcript "Highlights"

How many different color highlighters do you have in your desk drawer? CT Summation provides tools for highlighting transcripts and lends itself to several bells and whistles to manage the testimony further. More than likely, the staff is already comfortable with the process of highlighting testimony. In fact, you may have two or three different colors within the transcript that all represent something different.

Similarly, the transcript tools provide a color palette which allows you to:

- Assign a color to a User for highlighting testimony;
- Assign a color to the Issues in the case which is pulled from the Lookup Table; and
- Allows you to pick and choose a few favorites from

Group



Does Summation take PDF's?

Yes. The preferred file format for most applications in the legal industry is a single page .tiff file however, Summation supports image formats including: .pdf, .tif, jpeg, bmp, gif and wmf.

Imaging is so expensive, how do firms handle that?

The expense of imaging should be comparable to having copies made by your local service bureau. It should also be noted that expenses that are saved over the life of the case not only by having a centralized copy for each member of your team to access but also eliminate the number of times the documents are copied and misplaced over and over again.

Do PDF files have to be OCR'd to be searchable?

Yes, or they can be loaded as a searchable PDF file which would in turn be loaded as an eDoc.

How do you search for records which have images?

Refer to the #Image field for a value.

Who fills in the #Image field when an image is added; i.e., automatic or done by user?

The system populates the field with a value during the batch load. If the images are added manually, use the Update #Image and #OCR tool to check the summaries.

Can you compare two images side by side in Summation?

No, there is only one image viewer.

Can you hold a document image and scroll through to another summary?

Yes, you can pin a document with the push pin in the title bar of the image viewer and scroll through the summaries. Upon releasing the pin, the image catches up to the document selected.

Can you migrate data from an older version of Summation to iBlaze?

Yes.

How do you provide access to users on a network?

You must have a network license of CT Summation, then perform a client installation on the desktop.

Can Summation produce documents in PDF format?

Yes, when creating a briefcase, you have the option to convert to .pdf files.

If an image format is not supported by the Image Viewer, what will appear in the Image Viewer

the long list of users and/or issues to save time from scrolling down the list.

Once the testimony is highlighted in accordance with the various issues or users that were assigned different tasks, Summation allows you to show all of the highlights, only the favorites as identified above, or just your active highlights. An active highlight is the color you are presently using to highlight. Additionally, Summation can filter the highlights and provide you with a page of just that testimony which can be exported and used in other ways such as a Brief, reports to a client or an expert, etc.

In some instances a paralegal or junior associate may be assigned the task of reviewing a transcript and identifying key pieces of testimony with the highlighting feature. This work is usually reviewed by a more senior member of the team. By simply "right clicking" on the highlight during the next pass, the user can remove the highlight, resize the highlight or move the highlighted text into a transcript note which has additional features for generating reports down the line.

These are just the type of tips you'll find in *Summ it Up*.

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window?

Scenario: The user has attached a CAD-generated drawing to a CDB record, which image format is presumably not supported by the Image Viewer. Will the image open in HTML or will the user receive an error message? Answer: The image viewer will reveal: "There is No Image Associated with this Document."

Can you set the image view to default to full/wide?

Yes, with your image viewer in focus, View>Zoom>Wide.

The document in the image viewer is black and the text is reversed - how can I fix that?

Hit "V" on your keyboard to reverse the image.

Thank you for providing me the opportunity to be your CT Summation, WebBlaze & Enterprise Reseller, Trainer, Consultant. Your feedback is welcome.

Sincerely,

Michelle Kovitch
Litigation Management Technologies

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