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Litigation Management Technologies "For the Record"




Greetings!

This month features Part II of our four part series on ESI and your CT Summation Database. You can find out what the Judges are learning with respect to ESI and we'll talk about software that codes your documents for you. We continue our "Frequently Asked Questions" together with other services, tips, tricks and traps.

CT Summation won top honors in a variety of categories earlier this week at the Legal Technology News Awards Dinner in New York. Congratulations to Summation and their users!

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

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What are the Judges Learning?

The Federal Judicial Center has published a 26 page pocket guide. **Managing Discovery of Electronic Information: A Pocket Guide for Judges.** Barbara J. Rothstein; Ronald J. Hedges; Elizabeth C. Wiggins.



ESI and Your Summation DB

Part I of ESI and your Summation Database focused on Collecting the data which was discussed in our last newsletter. In this issue, we'll focus on Processing. Review and Production of ESI will be discussed in subsequent newsletters.



This pocket guide helps federal judges manage the discovery of electronically stored information (ESI). It covers issues unique to the discovery of ESI, including its scope, the allocation of

So now the data has been collected . . . "Just get it in there," have you heard that before? Try to get the attorneys involved in the decision making process in order to leverage the useful information that is provided within the electronic files. *Processing* is simply a means of extracting the data and bundling it up so that it can be loaded, searched, reviewed and produced in Summation's litigation review tool. For example, Outlook files when exported out of the program provide pieces of metadata that would benefit the litigation team when searching the discovery. They include fields of information such as "TO", "FROM", "DATE", "CC", "SUBJECT", etc. These are the descriptive pieces of information that we presently manually review and index when working with paper discovery. The metadata allows the team to search the discovery by criteria and eliminates the task of indexing. For example, I could search for every e-mail "FROM Michelle Kovitch TO John Doe SUBJECT E-discovery Tips" right out of the gates! Processing ESI can be accomplished with an in-house tool such as *Discovery Cracker* or engaging a service bureau.

Take time to envision how it will be helpful to cull up the data as you proceed with your case. Even though the data has already been collected, each piece of information that is captured during the processing stage from the ESI and then put into your deliverable load file will have a fee associated with it. It is important when working with your service bureau to be clear about which pieces of information or descriptive fields to have extracted. Consider whether or not your case really hinges on things like the creation date of a file. If possible, keep it simple and just stick to the fields you have available by default in your review tool such as: TO, FROM, CC, BCC, BODY, DATE SENT, DATE RECEIVED, SUBJECT LINE, APPLICATION. Other things to consider when having the data processed include: deduplication, conversion to images, maintaining the structure between an email and its attachment and date ranges specific to your case.

Our Next Issue will focus on *Reviewing*



FAQ's Related to Transcripts

Can you highlight text in transcripts?

Yes, beginning in Version 2.9 which ships in March.

How many transcripts can you put into Summation?

They stopped testing at 2,000

Can you use Realtime on LG Gold?

Yes

How do you export multiple transcripts with notes?

Multiple transcript with notes cannot be exported at one time but by right clicking on any of the transcripts in the Case Explorer Tree, you'll see the option to export transcript with notes

Can you link transcript text to an MPEG file?

The MPEG file must be synchronized to the text before being loaded. After the fact, video clips can be created

How do I update a realtime draft?

Upon receiving a Realtime feed, do not rename the file. When

costs, the form of production, the waiver of privilege and work product protection, and the preservation of data and spoliation.

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Download your copy here:
[A Pocket Guide for Judges](#)

"Summ it Up" Your Summation Guide

"Now that you have spent all that money to buy CT Summation, if you and your entire litigation support team want to **maximize** your investment, then Michelle Kovitch's *Summ it Up* is the one book to get. Many guidebooks show you how to use a program; but Michelle's book not only graphically describes how to use CT Summation but does much further in that she gives you a step by step

loading the official transcript, it will be important to look for the original file. When loading the transcripts, an option is provided to update a Realtime draft or load as a new transcript

Will notes, etc., remain intact after a transcript is updated?

Yes

Does Realtime cost more?

Yes, it depends on the venue but is usually comparable to the cost of an expedited transcript

How do court reporters obtain TranSendCR Plus to provide me with and SBF file?

Contact CT Summation, it can be downloaded or a CD can be requested as well: [CT Summation](#)

Do Realtime reporters need case information ahead of time?

Yes, it is important to communicate your needs and even provide a vocabulary list if possible for a more accurate feed

Can you print a transcript without notes?

Yes

Can transcripts in PDF format be brought into Summation, since that's becoming the standard format in the court systems?

PDF files are supported by Summation however, unless they are the correct transcript file format it cannot be loaded with other transcripts. The PDF files must be loaded within the Core Database which limits the functionality designed for reviewing transcripts

How do I request a transcript-and-exhibit file from my court reporter?

Request an SBF file format. If they are unfamiliar with the file format have them contact Summation directly.

Does each SBF exhibit receive an EXH-prefixed DocID number and are subsequent SBF exhibits sequentially numbered in this manner?

Yes

Can you create a Browser Briefcase containing transcripts with attached notes?

No

Can LiveNote synched .VID files be brought directly into Summation?

No, synched video files formatted for Trial Director and Sanction can be brought directly into Summation

Where do the video clip files reside within Summation?

Blaze\Case Data\\Tran\Taux

Can you provide the video clips along with an electronic brief?

Yes

Watch for Part III of FAQ's in our next newsletter.

Summation Classes

All Classes Hosted by [Ikon Legal Document Services](#)

Basic CT Summation Training
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CT Summation **Advanced** Training
March, 2008

For further information, click here
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User Groups

process to engage your entire support staff to take advantage of Summation's enormous capabilities."

Robert J. Kaufman, Esq.
Kaufman, Miller & Siversten

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The Documents can Code Themselves?

My teaching methods with respect to coding a database is very very flexible. We all know that each attorney works differently than the one in the office next to them. My goal has always been to find a practice that fits for you. Your database will only work as well as the fuel you put into it. In other words, if you are just searching the OCR trying to find the needle in the haystack, you are probably spending more time that it would cost to actual code the documents whether this was completed in-house or out sourced. I alluded to the fact that there was software out there can actually code your documents for you in my book, "*Summ it Up*", so I thought I would share this valuable morsel of information with you. Last year I had the distinct

CT Summation User groups are now active in Atlanta, Jacksonville and Columbia. This is a free resource designed to provide a forum for you to network and share your experiences with Summation, work through new issues your firm may be facing and leverage from listening to experiences from others in your area. For information regarding a CT Summation User Group near you, click here

[CT Summation User Groups](#)

Next Issue of "For the Record" . . . ine

- What's new in CT Summation 2.9?
- ESI & Your Summation database, Part III ~ reviewing the data
- FAQ's Related to the Core Database
- Rent vs. Buy
- Top Reasons to upgrade to iBlaze
- Summation Courses
- Summation User Groups

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Thank you for providing us the opportunity to be your CT Summation Reseller, Trainer, Consultant and Author of, *Summ it Up*. Your feedback is welcome.

Sincerely,

Michelle Kovitch
Litigation Management Technologies

pleasure of meeting Lisa Rosen of Rosen Technology in Chicago who took the time to show me what ALCoder can do for my clients. Listen up!

ALCoder plugs into an existing OCR database or database with electronically stored information for one click coding into CT Summation. This software is already being used by the US Department of Justice and the Securities and Exchange Commission. The software captures up to 14 fields of bibliographic fields and grades itself with a score of A-F allowing the users to prioritize which documents will need additional coding. ALCoder can code thousands of document per hour. You can easily add user-defined keywords, custom dictionaries, organizations and unusual names. While the information from ediscovery is very helpful for searching, ALCoder is equally beneficial for text extracted during Electronic Discovery. For example, does your database tell you the real date of the letter or the profile of the letter such as date it was created, saved, printed?

To schedule your demonstration of ALCoder, call us at 678/467-6624 or email info@lmtsupport.com

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