

## Michelle Kovitch

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## Litigation Management Technologies "For the Record"



Greetings!

This month you'll learn what's new with Summation? If you ever wondered what the real reasons are to upgrade to iBlaze, we'll explain. Finally, the continuation of the series on ESI and your CT Summation Database together with our "Frequently Asked Questions".

CT Summation announces Best Practices Summit dates and a Product Enhancement form.

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

 Forward to a Friend

### In This Issue

[ESI & Your Database, Part III](#)

[10 Reasons to upgrade to iBlaze](#)

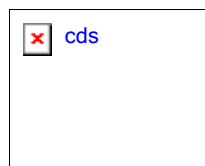
[CT Summation FAQ's](#)

[What's new with Summation?](#)

[Summation Classes & User Groups](#)

### ESI and Your Summation DB

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



After the files are loaded into Summation and the team starts

### "Summ it Up" Your Summation Guide

"We just bought a new book about Summation and have been very pleased with it. It is by Michelle Kovitch, she is a Summation Certified Trainer in Atlanta. I highly recommend her training services and I think every law firm should own a copy of this book.

I am an SCT and a  
Litigation Support

*reviewing* the discovery, make sure they are very comfortable with building boolean searches, using searching connectors and culling through the data to retrieve documents based on all different types of criteria.

Identify 'buzz words' early on in the case and make sure they are communicated to all of the reviewers. Keep a log of these terms as they likely may be an exhibit to your motion attempting to assert a "claw back privilege" later in the case.

Simple things such as setting the sort order in CT Summation by "FROM" and then "DOCDATE" will sort the summaries so that if there are any duplicates they will be grouped together and can be easily weeded through.

If you chose to review the documents in native file, it requires that the firm have the necessary applications installed on the desktops. Finally, dual monitor set ups save the user time and eliminate the number of "clicks" while navigating through the records.

Our Next Issue will focus on *Production*

## TOP 10 Reasons to Upgrade to iBlaze

**Ten** - If you have documents stored up on the web (i.e., Case Vault), iBlaze allows you to access a remote database through your local copy of Summation and pull down the documents you need to have locally;

**Nine**- OCR on-the-fly provides you with the tools to OCR those straggler documents that were loaded manually providing you with the ability to search the text of the documents;

**Eight** - No more typing a long paragraph you wish you could just copy and paste into the field. The Zoning Tool allows you to copy of clip from a document in the database and paste it into a field.

**Seven** - briefcases allow you to take a group of documents, throw them into a folder and distribute them on a CD to an expert(s) or client;

**Six** - briefcases are a convenient way to serve production sets to the firm that also uses Summation or to the firm that does not. Likewise, you can be served with a briefcase and just dump it into your case;

**Five**- creating a production set in Summation allows you to identify the production numbering scheme and electronically number your documents;

**Four** - briefcasing a set of documents gives you the option to stamp text on a page, (i.e., confidential, attorneys eyes only, etc.)

**Three** - briefcasing also allows you to electronically redact your documents very easily while maintaining the integrity of the original document as well;

**Two** - never worry again about someone removing a document from a production set and not returning it, briefcases are static files;

Specialist. My background is in IT. I have found her explanation of the litigation process clear and concise. It has helped me to fill in some of the gaps that I still have about the litigation process, even though I have been training for years.

I passed it along to one of my senior paralegals and now I can't get it back. She also has been using Summation for several years. She found it to be helpful as well. The book walks you through the litigation lifecycle and explains how to setup and use Summation in each phase. It provides guidance for the decision making process.

This is that book we have all been asking for, not a list of steps, but a real *Practical Guide*".

Sherry Hicks  
Litigation Support  
Specialist  
Miller & Martin PLLC  
Order your copy today at:  
[www.lmtsupport.com](http://www.lmtsupport.com)

## What's New With Summation?

CT Summation Version 2.9 was released this month. Focus, Focus, Focus . . . ever had someone yell that out? Usually an end user will need to 'focus' on which window is active in Summation in order to access the appropriate

**One** - Tracking! For those moments when opposing counsel challenges you. Whether you have produced the same document one time or 100 times, you can instantly identify: when it was produced, how it was produced and what number it was assigned.

If you need to trade up to iBlaze, no worries - you'll receive credit for the assets you already own and just pay a trade-up difference. Call us for a pricing at 678/467-6624.



## FAQ's Related to the Core Database

**Can we have documents loaded in Summation without OCR?**

Yes

**Can you make your own fields/customize the database?**

Yes

**Do you have to code every field?**

No

**Do we get to setup our own issues?**

Yes, the issues are case specific. It is possible however to set up a master case with legal issues and copy from there in lieu of starting from scratch at the beginning of each case

**Does it spell check?**

Yes

**How do you create the first issue in a case?**

Without having any documents loaded into the Core Database, issues can be added by going to the Case Drop Down Menu>Add Issues

**Can you edit the DocID and Depexh# fields?**

The docid field can be edited but the link to the image will no longer work. The Depexh# fields can be edited as well

**Is the "Include Family Summaries" feature available within the Core Database in iBlaze?**

Yes, Ctrl X

**Can you sort the issues list alphabetically?**

Yes

**What happens to DocID numbers in production sets?**

If a briefcase is created after creating a production set, the original Docid number is replaced with the production number but only in the briefcase itself.

**Are Related Summaries relationships available to all users on a network?**

Yes

**Can I attach a searchable text note to a specific page in an image file?**

No, but you can add a note to the text (OCR) of the image.

**Can you print Core Database summaries?**

Yes

**Can you change the DocID number to the Bates number?**

toolbar for that window. Version 2.9 not only adds a splash of color to the main toolbar but places the buttons appropriate for each window within the window the user is working with.

Version 2.9 also provides attorneys the function of **highlighting text** in a deposition. This function allows you to organize issues and key testimony by filtering highlighted text and then generate reports.

This year Summation will conduct three separate **Best Practices Summits**. This one day seminar will provide attendees with valuable information focusing on methods and technologies for legal case preparation. Summation users attended this event last year from all over the country. For more information, [Best Practices Summit](#)

Summation wants to hear from you! Ever wish Summation could do this or that? Send in your **enhancement requests** and have a say so with the new tools Summation provides in a future release. To fill out your [Product Enhancement Request Form](#)

## Summation Classes & User Groups

Basic CT Summation

If the docid number is changed in the Core Database it will no longer be linked to the image. However, when creating a production set, the prodno (Batesnumber) becomes the Docid#

**What size DB can Summation handle?**

2 GB

**Is it possible to have multiple issues lookup tables per case?**

Scenario: The coding paralegals have access to all 140 issues fields, whereas the trial paralegals only need 15 of the issues fields and don't want to have to paw through the remainder.

Answer: No . . . they would have to have separate issue fields to have separate issue lookup tables

**Is it possible to set up multiple forms per case and limit a user's access to a certain form?**

Scenario: A coder would have a limited form view, allowing them access to code only certain fields. Answer: Yes

**Is there any way to limit access to records?**

Scenario: A coder would have access to a group of records but be precluded from accessing other records. Answer: No

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

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

- ESI & Your Summation database, Part IV ~ Production
- FAQ's Related to the Core Database (2 of 3)
- Scripting
- Rent vs. Buy
- Summation Courses
- Summation User Groups

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**Offer Expires: Open ended**

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

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**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  
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