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Litigation Management Technologies "For the Record"



Greetings!

Change is here. The trees are beautiful in Atlanta. But the seasons aren't the only thing changing, CT Summation iBlaze Version 2.9.1 is almost here. In this Newsletter, you'll learn from our regular series of Frequently Asked Questions, and read about how we are changing to meet your needs. I just returned from my Summation Enterprise Certification and watched 5 hours of loading data dramatically cut down to 15 minutes using Enterprise! Time is money right? Great things are happening as we move forward with technology and Summation is paving the way.

As the holidays approach, it is important for me to tell you how grateful I am for your confidence in our services. Each one of you have played a part in our success and I appreciate your business. Happy Thanksgiving!

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



FAQ's Related to the Core Database, continued

Question: Your opponent requests the production of your client's documents in the order in which they were maintained in the ordinary course of business and in the order responsive to the request. You load the documents in Summation and assign reviewers to specific subsets of the documents. Each reviewer assesses his/her group of documents, marks for privilege, etc. What's the best way to then assemble a production set, sequentially numbered, that

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CT Summation's Next Release

Most of the time, the firm's IT department will

responds to the production request number in order?

Answer: Set up a custom field that the reviewers will code which identifies the number of the Request the document responds to. When creating the production set, have that custom field displayed and then sort the field before briefcasing. This will put the documents in the responsive order.

Question: Can you somehow save a search result "set" (for lack of a better term) so that additional records added in the interim are not included in the set? For example, the user searches for Author eq Douglas Cowan AND doctype eq letter and retrieves a set of documents. Can that set be made "static" so that Cowan letters added afterwards are not included in that set (as opposed to running a saved search, for instance)?

Answer: Not a saved search but you can move the documents that are retrieved over to a tab in the Case Organizer, label the tab with the search criteria and the date. Of course, briefcasing the documents will make a copy, folder them and remain a static file as well.

Question: What kind of review tracking history can a user uncover?

Answer:

a. All reviewers or the last reviewer?

If the record has been updated refer to #LOGNAME

b. Date/time of last change or all changes?

#UPDATE or #UPTIME

c. Amount of time spent on a given document's review? No field captures this information

d. Who redacted a document?

No field captures this information but can be manually coded into the properties field, (watch for this in a future release).

e. Date/time/changes of previous versions of an electronic document? (MS Word's Track Changes feature) . No, but the new properties of this electronic file would provide some information.

Question: Is there a way to view previous production versions of a document from the original Core Database record of a produced doc?

Answer: Yes, right click on the grey area of the summary in the Column view, if the document has been produced, you'll have an option to see the document's production history.

Question: If you have more than one person listed in the Recipient field and you run a tally, will the tally reflect the total by each individual recipient or group of authors?

Answer: By each individual recipient but you can also tally the author field.

Question: If you sort the author or recipient field and more than one name appears in a field, how will it sort if the one name starts with a "z" and the other starts with a "b"?

Answer: Right click on the field and click on "exploded sort" which will expand the number of summaries and display a duplicate entry for each

handle the upgrades and the end users are unaware of what the numerical value of the release represents.

Version "2.9" is the most recent release of the software application. Usually, the third digit (i.e. 2.8.3) represents an update in which you do not notice a difference in the user interface of the application or the tools that are available to you. You have seen similar instances by receiving notices from Adobe, Microsoft, etc., about updates that are available.

The most current "hot fix" is 2.9.0.3 represented by the 4th digit. Not all firms may be experiencing the issues that relate to the hot fix however, it addresses work stations running IE7. Sometimes the edocs viewer was not updating an edoc or attachment record to be in sync with the corresponding core database record, specifically after running a quick search. In summary, if you have upgraded to Version 2.9, the hot fix can be obtained by contacting us or Product Support at CT Summation. The download ZIP file contains the instructions but it is a cumulative update which means that it contains .2 fix, so you will not have to apply .2 then .3 just to apply .3

Now that we've explained the logic behind the numbers, *forget it!* CT Summation 2.9.1 will be released any day now and will include more than just updates but will have enhancements that you will want to be aware of and use in your practice.

The highlighting feature within transcripts will allow you to issue code

You'll be able to re-assign highlight colors to the transcripts on-the-fly

You'll be able to hide the bulky toolbar in your image view

When customizing your database form, you'll be able to add radio buttons, check boxes and colors to your template.

**Features and enhancements to version 2.9.1 are subject to change without notice. Please contact us for up to date information at 678/467-6624.

entry in the multi-entry field. For example, if you sort as an exploded sort by Author and the record has three entries, each record will be included three times in your search results.

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

Bridging the Gap!

If you find yourself having trouble communicating your needs to your IT Department or Litigation Support or vice versa, you're not alone. These departments have worked independent of each other for years but with technology becoming more and more a part of our litigation practice we must learn each other's jargon and blend our departments.



In an effort to assist you, Litigation Management Technologies offers "Bridging the Gap" and provides ten tips to avoid backstrokes, a free one hour presentation. This can be conducted on-site at your office, via an eseminar over the web or you can participate in a general forum eseminar which will be held on December 11, 2008.

Please contact us to schedule your presentation at Kovitch@lmtsupport.com or 678/467-6624. To register for the general forum, please register here [Bridging the Gap](#)

What is Scripting?

Most support staff members in a law firm are familiar with a Macro. A Macro is a method which is commonly used in Word which records a sequence of actions that are repeated frequently. For example, the signature block to a pleading including the date, attorney's name, bar number and contact information may be recorded so that in the future a simple keystroke will perform this task quickly.

This is similar to a script in a computer programmer's environment. The wonderful thing about scripts in Summation is that they have already been created. Some of the scripts are embedded in the program and others must be requested from CT Summation's scripting department. For example, did you know



CT Summation Training Classes

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- [eDiscovery & What to Expect from Summation](#)
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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, December 2nd.

This is an easy way to provide you with the best resources and the Best Practices when using Summation. You will have the opportunity to talk matters through with other end users and form the agenda by submitted topics to Kovitch@lmtsupport.com. Admission is based on availability and seating is limited to one representative per firm. Please join us! [Atlanta User Group](#)



Does Summation have a Book? **Yes!**

"Summ it Up"

Bridges the communication gap between
IT, Litigators & Vendors

Each chapter mirrors the litigation
timeline

that CT Summation can go through and count how many pages are associated with each document and magically populate the page count field? Take a look . . . with your Column view in focus>Summary>Tools>Verify Image Page count.

Here's another one, did you know that on the second part of your Case Explorer Tree is an area called Custom Tools? If you don't see it, that just means you need to be given the rights to see it by your Firm Administrator in the Admin Console. These too are scripts. They do things like quickly run through a transcript and link the photograph everywhere it says "photograph" within the testimony. It can also do things like automatically fill in your EndDoc# field. Most of the popular scripts for an end user are available within the program. However, for more complicated functions CT Summation has a scripting department. So next time you wish there was a quicker way to get things done, see if there is a script? For more information on scripting, please contact Kovitch@lmtsupport.com or 678-467-6624.

Provides step by step "how to" and "when to" use each tool

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Sincerely,

Michelle Kovitch
Litigation Management Technologies

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