



**Midwest Paralegal
Services & Solutions**

Milwaukee:
414-764-2772

Madison:
608-255-0559

Summation Training Checklist

Items NOT highlighted are for Introductory Training.
Items in **Red** are for Advanced Training.

Some items will be a part of every training class, as they are basic tools for Summation production.

WHAT IS SUMMATION?

- Overview
- The Summation Environment
- The Welcome Page
- Terms for new users
- The CT Summation iBlaze desktop
- The CT Summation iBlaze Home Page
- Setting CT Summation iBlaze news options
- Keystroke shortcuts
- Supported file formats
- Changing your toolbar options
- Case Explorer
- Layouts and Navigating in Summation

WORKING WITH CASES

- Creating Cases
- Opening Cases
- Deleting Cases

WORKING WITH THE CORE DATABASE

- Navigating the Core Database
 - Opening the Core Database
 - Sorting the Core Database
 - Using Simple Sort
 - Tallying Data
 - Setting Sort Order for Searches

SEARCHING THE CORE DATABASE

- Quick Searching the Core Database
- Searching Field Data Using the Quick Search Bar
- Subset Searches
- Compound Searching
- Context Menu Searching
- Vocabulary List Searching
- Click and Find
- Boolean Searching
- Finding New Values**



EDITING THE CORE DATABASE

- Adding Summaries to the Core Database
- Editing Summaries to the Core Database
- Adding and Removing Category Tags from Records
- Adding Data to Look-Up Tables
- Spell check records

PRINTING CORE DATABASE SUMMARIES AND REPORTS

- Printing Summaries
- Printing a Search Results Report

CORE DATABASE UTILITIES

- Checking the Network Status
- Backing Up the Database
- Checking the Database for Errors
- Packing the Database
- Blazing the Database
- Restoring the Backup

WORKING WITH IMAGES

- Viewing Images
- Loading Images
- Printing Images
- Marking Up Images
- Creating Slideshows

WORKING WITH TRANSCRIPTS AND ANNOTATIONS

- Loading Transcripts
- Removing a Transcript
- Managing Transcripts with Folders
- Navigating the Transcript Window
- Searching Transcripts
 - Quick Searching Transcripts
 - Compound Searching
 - Vocabulary Searching
 - Fuzzy Searching
- Printing Transcripts, Excerpts and Reports
- Annotating Transcripts
 - Creating Transcript Annotations and Designations
 - Opening Transcript Annotations
 - Navigating Transcript Annotations
- Searching Transcript Annotations
- Printing Annotations and Reports

WORKING WITH EDOCS AND EMAIL

- Loading eMail
- Navigating Edocs and Email
- Searching Edocs and Email
- Quick Searching Edocs



- Compound Searching
- Context Menu Searching
- Vocabulary Searching
- Boolean Searching
- Searching Field Data Using the Quick Search Bar
- Edit Edocs Summaries
- Printing Edocs Summaries and Reports

WORKING WITH PRODUCTION SETS

- Creating Production Sets
- Retrieving Production Sets
- Reviewing Production History

WORKING WITH OCR BASE

- Loading OCR Base
- Navigating the OCR Base
- Searching OCR Base
- Printing OCR Base Search Results Reports
- OCR Base Utilities
 - Backing Up the OCR Base
 - Checking the OCR Base for Errors
- Blazing the OCR Base

WORKING WITH PLEADINGS

- Managing Pleadings
- Loading Pleadings
- Navigating Pleadings
- Searching Pleadings

WORKING WITH DOCUMENT COLLECTIONS

- Working with Companion Databases
 - Creating Companion Database Connections to Summation Cases
 - Searching Companion Databases
 - Editing Companion Database Summaries
- Working with Remote Databases
 - Opening and Navigating Remote Databases
 - Searching Remote Databases
 - Editing Remote Databases
- Working with Briefcases
 - Brief casing Database Summaries
 - Opening and Navigating Briefcases
 - Searching Briefcases

WORKING WITH FORMS

- Using Summation Forms
 - Reviewing Summation Forms
 - Customizing Summation Forms
- Form Editor Basics
- Creating and Modifying Forms



Developing Lookup Tables

PUTTING IT ALL TOGETHER

Integrated Searching

- Quick Searching Multiple Case Elements

- Printing Multiple Case element Search Results Reports

Attaching Images to Annotations

Evidence Linking

- Linking Evidence in Transcripts

 - Creating Transcript Links

 - Navigating Transcript Links

 - Linking Back to a Transcript

 - Color Coding Transcript Links

 - Modifying and Removing Transcript Links

 - Linking Evidence in the Core Database

 - Linking to Other Summaries

 - Linking to Windows Documents and Web Sites

Linking Evidence in Images

The Case Organizer

- Using the Case Organizer

 - Opening and Navigating the Case Organizer

 - Adding Data to the Case Organizer

 - Editing and Formatting Data in the Case Organizer

OTHER SUMMATION TASKS

TASKS

- Export text Files

- Load DII Files

- Set up Look-ups as a Database

- Set up Chronology tables as a Database