

CT Summation iBlaze



Demonstration Guide

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CT SUMMATION iBLAZE: The Industry Standard

iBlaze is CT Summation's award-winning litigation support solution. Used by over 60% of all law firms, this industry-leading application enables users to import and process electronically stored evidence, manage case documents, handle text and video transcripts and perform document review, evaluation and production, all from a single solution. Its unique application portability features enable users to share case information across entire litigation teams. And even when an Internet connection isn't available, iBlaze is, allowing users to download cases to continue work offline. To take portability to the next level, users can extend case accessibility using WebBlaze, CT Summation's browser-based Internet platform, to keep even the most remote team members fully connected.

Easy to learn and easy to use, the intuitive graphical interface allows users to quickly access and edit all case documents, including depositions, case pleadings, transcripts, case timelines, casts of characters, chronologies of events, photos, blueprints and audio and video testimony and evidence. iBlaze continues to lead the field by incorporating features including cutting-edge eDiscovery tools, and it remains the only platform to offer fully integrated realtime court reporting transcription and analysis.

PURPOSE OF THE GUIDE

The purpose of this guide is to provide a general overview of some of the most commonly used features in iBlaze and introduce the standard user interface consistent throughout all CT Summation products. The evaluation version of the software includes a sample case designed to guide new users through the basics of iBlaze and offers the opportunity to manage, organize, analyze and present a case using actual case evidence. In addition, users can create their own cases and manage an unlimited number of transcripts and documents to further gauge its power and versatility in “real world” conditions. For a complete overview of CT Summation iBlaze, please visit CT Summation’s online support center at <http://www.ctsummation.com/Support/>.

Demonstration Case

“P. Franc v. K. Morris”

INTRODUCTION

The sample case is based around an event in which a mudslide from a construction project displaced earth from the Defendant’s property and deposited it onto Plaintiff’s property, causing flooding which resulted in significant damage to the Plaintiff’s property. The displaced earth and water also contained harmful substances, causing the Plaintiff physical injury. Finally, there is evidence of deliberate misconduct by Defendant, giving rise to potential punitive damages.

LEGAL ISSUES

Legal issues in the case include Negligence, Nuisance, and Willful Creation of a Nuisance.

FACTUAL ISSUES

Defendants submitted a design to construct a fill slope in an arroyo; i.e., a ravine or narrow canyon. The approved design specified a slope of 20 vertical feet. The slope as built exceeded 60 vertical feet. During a heavy rainstorm, half of the fill slope gave way, sliding down the arroyo and onto Plaintiff’s property.

Mud and debris clogged a storm drain, resulting in a large area of impounded water that flooded the first floor of Plaintiff’s house. Several days after wading into the floodwaters to save his dog, Plaintiff developed a severe rash on both legs and feet. Poison oak in the debris-laden floodwaters may have caused the rash. Contaminants in the fill material released into the floodwater may have also caused, or contributed to, the rash.

CAST OF CHARACTERS

Peter Franc: Plaintiff, an entrepreneur and down-slope homeowner.

Kelly & Jamie Morris: Defendants, homeowners and owner-builders of the project.

Conner Stevens: Defendant, Geotechnical Engineer.
Viking Construction: Defendant, contractor for home construction.

Nick Thomas: Defendant, contractor for grading and excavation.

Town of Las Mesas: Defendant, permit authority for the project.

John Ace: Site Superintendent working for both Viking Construction and the Morris’ individually.

Douglas Cowan: Geotechnical engineer for remediation and Defense expert witness.

Peter Wool: Geotechnical engineer for the Town of Las Mesas.

PROCEDURAL POSTURE

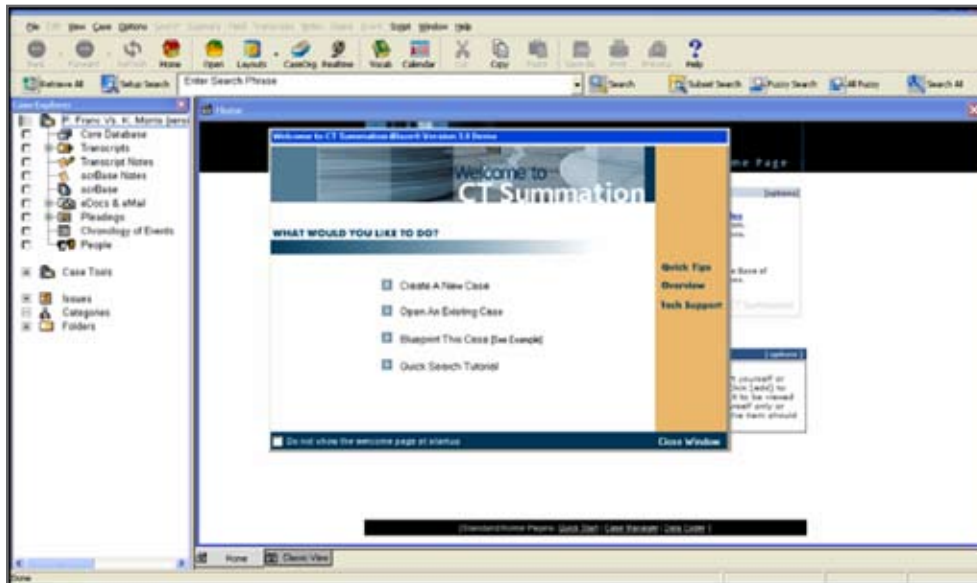
If the facts of the case show Willful Creation of a Nuisance, Plaintiff may also be able to support an additional claim of punitive damages. Investigation must include which chemicals in the soil may have caused or contributed to Plaintiff's physical injury.

The sample case includes completed depositions, including that of the defense expert, Douglas Cowan, and discovery documents, including photographs and imaged and summarized blueprint plans. Additional case materials are available via online document repositories of Material Safety Data Sheet (MSDS) information that may contain potential chemical sources for the physical injury.

Launching CT Summation iBlaze

WELCOME PAGE

Each time iBlaze is launched, a welcome page displays a list of links to the most frequently accessed functions. Users can quickly “Create a New Case”, “Open an Existing Case”, “Blueprint the Case”, take a “Quick Search Tutorial” or access “Quick Tips”, an “Overview” or find “Tech Support”. To disable the welcome page in future sessions, simply select “Do not show the welcome page at startup” in the lower left-hand corner of the welcome page window. To continue with the demonstration, click “Close Window” in the bottom right-hand corner of the welcome page.



Once you have successfully installed the iBlaze software on your computer, double-click on the “CT Summation iBlaze DEMO Version 2.9 Mobile Edition” icon found on your Desktop to launch the application:

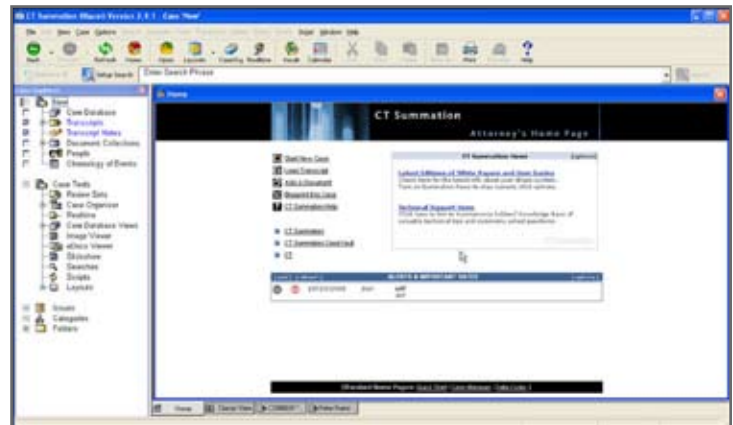


To return to the default view at any time, simply click on the arrow to the right of the Layouts icon in the Toolbar at the top of the screen and select Reset Layout:



DEFAULT VIEW

Closing the welcome page reveals the default view window:



PRIMARY TOOLBAR

At the top of the screen, the Primary Toolbar allows users to access all basic functions and launch additional features. Like an Internet web browser toolbar, the iBlaze Primary Toolbar allows users to toggle backward and forward through windows, refresh windows, return to the default home page, open documents, access program features, perform basic word processing and printing tasks and access comprehensive Help documentation:

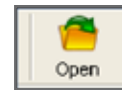


Opening a Case

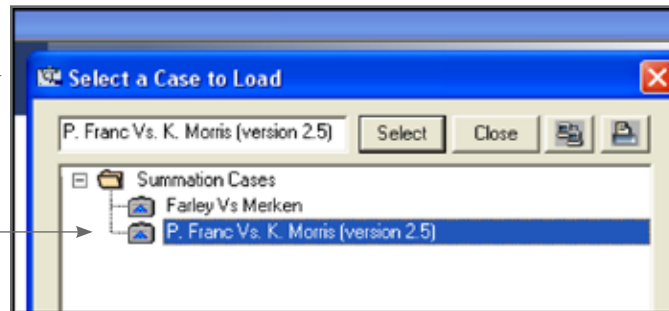
To begin the demonstration using the sample case:

1. Click on the “Open” icon on the Toolbar
A. The “Select a Case to Load” window will appear.
2. Click on “P. Franc vs. K. Morris (version 2.5)” to highlight the case, then click the Select button at the top of the Select a Case to Load window to open the case.

STEP 1



STEP 1A



STEP 2

Case Explorer

Along the left-hand margin of the default view window is the Case Explorer pane:



By selecting or de-selecting checkboxes next to each heading, users can search a single item, or any combination of items. For example, by selecting only Transcript Notes and Pleadings, a search will be limited to items in those two folders. Headings with plus boxes next to them contain multiple items. Click on plus boxes to expand the menu to view and/or select individual items within a folder.

The Case Explorer pane contains tree menus that allow users to access, view and search all elements and items for a selected case. At the top of the Case Explorer pane, the title of the selected case will be listed, in this instance “P. Franc vs. K. Morris (version 2.5).” Below the title of the case, all the files related to the case are grouped in various folders as defined below:

- Core Database – Database containing top-level document summaries with links to images, native files, email and OCR-captured text, including fielded data and metadata.
- Transcripts – Folder containing the testimonial record of the case, including deposition, hearing and trial transcripts.
- Transcript Notes – Database containing user-created notes and excerpts related to documents contained in the Transcripts folder.
- ocrBase – Database containing the original versions of documents summarized in the Core Database that have been imaged and converted into text via OCR.
- ocrBase Notes – Database containing user-created notes and excerpts related to documents in the ocrBase.
- eDocs & Email – Folder containing original versions of all electronic documents, email and email attachments summarized in the Core Database.
- Pleadings – Searchable collection of all case pleadings.
- Chronology of Events – Chronologically ordered collection of user-defined factual events related to the case.
- People – User-defined listing of key players and their role(s) in the case, also known as the Cast of Characters.

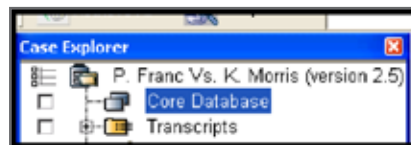
CASE TOOLS

The middle portion of the Case Explorer pane is the Case Tools area. Double-click on any item to display its contents in the main viewing pane of the default view. For example, double-click “Image View” to view any images related to the case in the main viewing pane or double-click “Realtime” to open the integrated realtime transcript tool).

The bottom portion of the Case Explorer pane contains organizational tools which allow users to tag and organize documents according to user-defined criteria and/or and move documents into user-created folders.

THE CORE DATABASE

Open the Core Database by double-clicking on the “Core Database” heading at the top of the Case Explorer pane:



As a case progresses and documents begin to accumulate, iBlaze allows users to organize all the case documents and store them in the Core Database, which appears as a table containing several fields:

The default view that appears is known as the Column View. The Column View is a table of file summaries with field headers along the top and summary numbers along the left side.

Index	Docid	Date	Document	Issues	Summary
1	ED00001	09/19/1996	Blueprint	Negligence Nuisance Wild Decision of Nuisance Plan Non-compliance	Original site plan approved by town.
2	ED00002	05/03/1998	Blueprint	Teetering Rock Sigma Damages	Slide Repair plan
3	ED00003	09/11/1996	Handwritten Note	Building Code Violation Pod Extension Relaxed Flat Space Plan Non-compliance	Notes from planning commission meeting
4	ED00004	05/07/1997	Blueprint	Altn Natural Terrain Building Code Violation Plan Non-compliance > Sixty Feet	Original plan for gabion wall set slope
5	ED00005	09/25/1996	Blueprint	Plan Non-compliance	Original grading and drainage plan
6	ED00000	09/25/1996	Blueprint	Plan Non-compliance	Original grading and drainage plan marked as depo exhibit
7	ED00009	05/12/1998	Facsimile Transmittal	Plan Non-compliance Sixty Feet > Sixty Feet	Fax cover and drawing
8	ED000100	01/04/1996	Blueprint	Architect's Negligence Plan Non-compliance	Drawing of plan for energy dissipator construction
9	ED000101	09/09/1996	Blueprint	Plan Non-compliance	Mailed up original damage and fill plan.
10	ED000102	09/09/1998	Blueprint	Teetering Rock Sigma Damages	Remediation plan
11	ED000001	09/14/1998	Letter	Sigma Damages	Landslide Repair Plan Review from Cowan

Default fields are (from left to right):

- Docid - The document number or beginning Bates number of a file.
- Document Date – The date of the original document; e.g., the date a Memorandum was composed.
- Document Type – E.g., Spreadsheet, Facsimile Transmittal, Photograph, etc.
- Issues – User-defined criteria outlining the issues contained in the listed file and their relation to the case; e.g., Fraud, Punitive Damages, Building Code Violation.

Defining and Editing Fields in the Column View

1. To view a list of additional fields, click on the “Fields” box in the top left-hand corner of the Column View window.
2. The “Field List” window will appear.
3. To add a field to the Column View, simply select a field and drag it into the Column View. For demonstration purposes, select the “Author” field and drag it from the Field List to the Column View between the Docid and the Date fields.
4. To select multiple fields, click each field you wish to add and drag them into the Column View. For instance, select the “Attynote” field, scroll down and select the “Recip” field, then drag them into the Column View next to the Author field.
5. When done, close the Field List window.

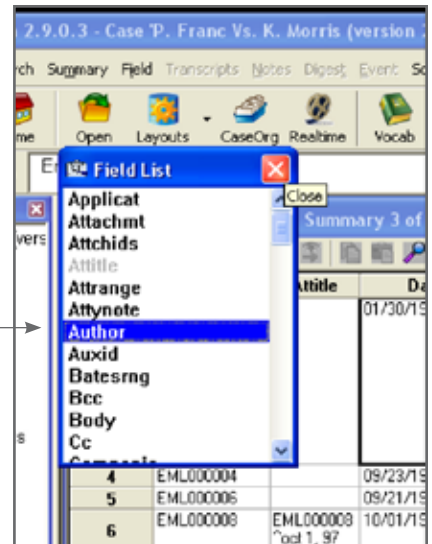
STEP 1



STEP 2



STEP 3



STEP 5



Sorting Fields in Column View

The Column View feature allows users to quickly and easily reorder and sort fields to make case data more useful. For example, with just one click, users can sort all case materials in the Column View by date to generate a chronology of events:

1. In the Column View, click on the header for the Date field. A menu will appear:
2. Select the first item on the menu, “Sort DocDate Oldest to Newest”. The Column View will be automatically reordered and all files will be listed chronologically from oldest to newest.

STEP 1

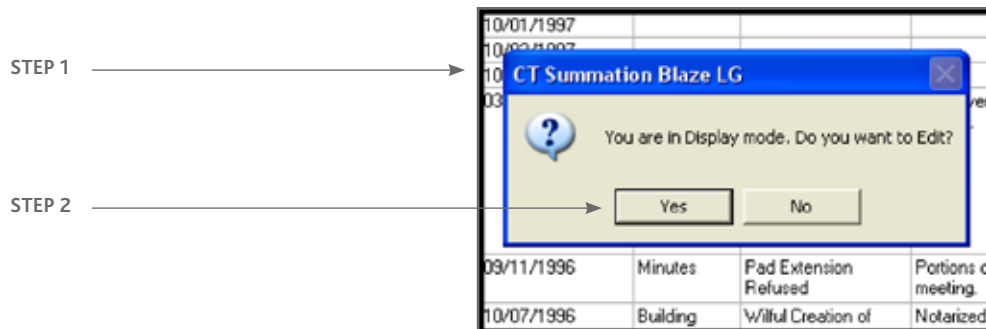


Editing Cells in Column View Fields

Users can easily edit data within a cell in the Column View table. One of the most commonly edited fields, the Attnynote field, allows users to add notes to a file in order to call out particular items of interest within a given file, leave messages for other users reviewing a file or summarize the content of a file. To add a note:

1. Double-click on a cell in the Attnynote field in the Column View. The following dialog box will appear:
2. Click “Yes” to unlock the Column View for editing and enter notes into the Attnynote field.

Once the Column View has been opened for editing, users may edit information in any cell within the table.



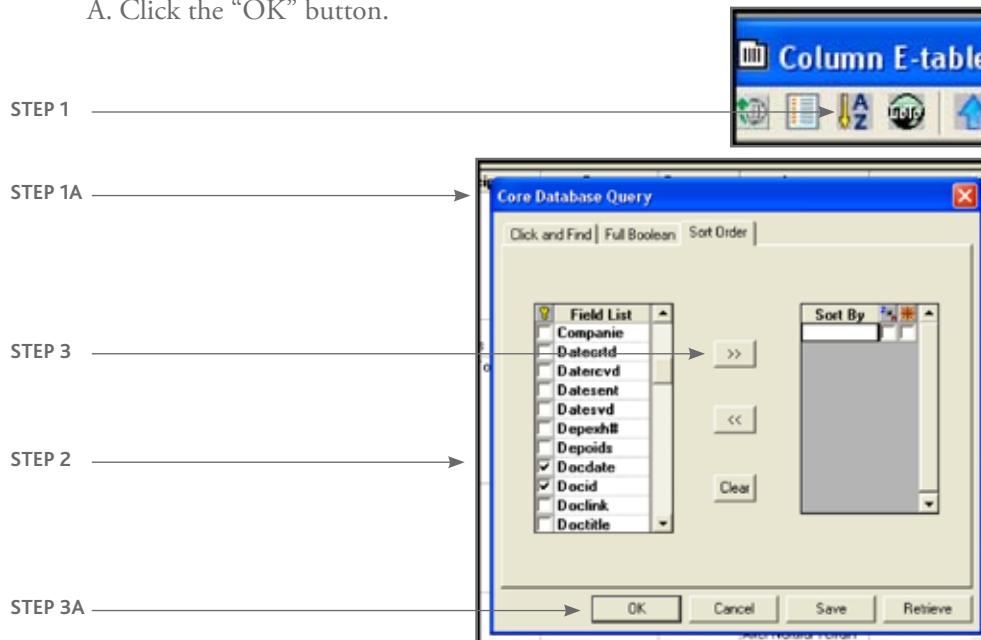
Searching the Core Database

The industry leader in comprehensive case search, iBlaze allows users to quickly search and organize information within a case. By maintaining command and control of all files related to a case, law professionals can call up the information they need at a moment's notice. In the process of preparing for a deposition, an attorney must often perform an exhaustive review of the documentation to ensure a complete understanding of all aspects of a deponent's relationship to the case. With its powerful search capability, iBlaze allows users to find and organize all files relevant to a given issue or deponent with just a few clicks. Due to the numerous ways users can search within iBlaze, this guide will address some of the most common search techniques in the following section and incorporate other search techniques into examples of additional features throughout the remainder of the demonstration guide.

Keyword Search and Form Display

To do this, one must first run a search to find any instance in which the word “Morris” appears in the Core Database:

1. Click on the Sort Order icon in the title bar at the top of the Column View window:
 - A. The Core Database Query window will appear.
2. Scroll down to the Docdate field and click in the box to select it.
3. Click on the double-chevron button pointing to the right to add the Docdate field to the Sort By column
 - A. Click the “OK” button.



To prepare for the deposition of Kelly Morris, the key defendant in P. Franc vs. K. Morris, an attorney might wish to locate all information related to Mr. Morris in the Core Database. One goal might be to find all documents authored by Mr. Morris in order to directly question him about their content. It might also be useful to generate a list of documents Mr. Morris received during the operative period of litigation.

4. Locate the Enter Search Phrase field at the top of the Column View. Type the name “Morris” into the field and click the “Search’ icon to the right of the search field.

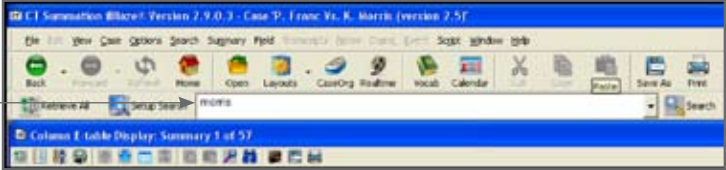
A. Search results displayed in the Column View window will contain all documents in the Core Database that include the name “Morris”.

5. Next, click on the “Form” tab at the bottom of the screen to bring up the Form Display, which provides a more detailed view of a given record.

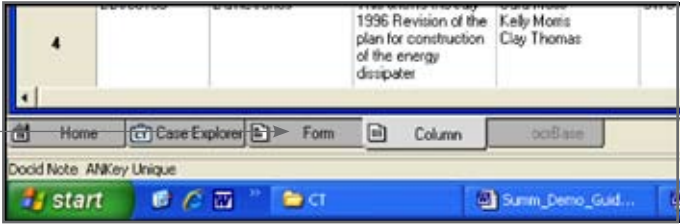
A. All instances of the search term within the record will be highlighted in blue:

STEP 4


STEP 4A



STEP 5



STEP 5A



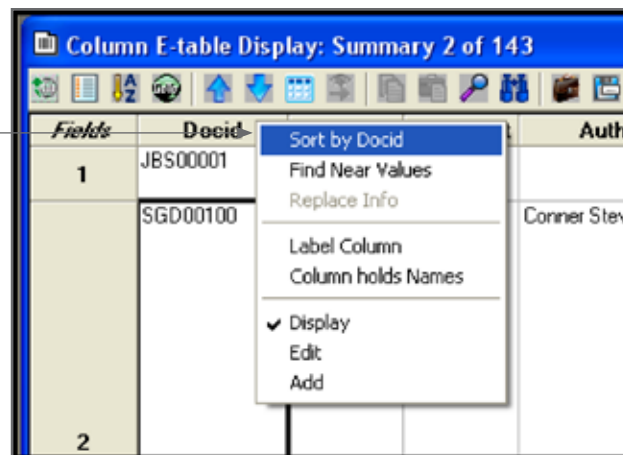
Search Within Column View and Search by File Type

One of the fastest and easiest ways to search the Core Database is to search directly within the Column View window. Use the following the instructions to find and sort information in any field within the Column View. For example, to find all blueprints in the Core Database:

1. Click on the Docid field header and select “Sort by Docid”:
2. Locate the “Document” cell within Row 1 (Docid BDJ0001) and click on that cell.
3. Right-click on the cell. A menu will appear.
4. Select “Search with Doctype eq “Blueprint”” to return the summaries for all blueprints in the Core Database for the selected case.

A list of all blueprints in the Core Database will be automatically generated in the Column View window.

STEP 1



STEP 2

Fault#	Docid	Author	Abstract	Recip	Date	Document	Issues	Original doc id
1	800001	David Jones	THERE IS NOTHING ON THIS PLAN THAT SHOWS THE TILES WERE BOULDERED THE DAY BEFORE THIS IS THE APPROVED PLAN Location: 20000000	Earl Patten Clay Thomas	06/15/1996	Blueprint	Negligence Failure Location of Materials Plan Non-compliance	Original doc id

STEP 3

Document	Issues
Blueprint	Teetering Rock Stigma Damages
Handwritten Note	
Blueprint	Slide Repair plan
	Violation Plan Non-compliance

STEP 4

A list of all blueprints in the Core Database will be automatically generated in the Column View window.

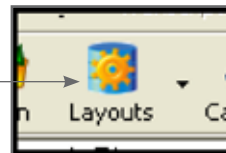
Search Using Boolean Logic

Another way to search documents by specific field type is by using the Boolean Logic feature. Boolean is a search method similar to what attorneys use when searching case law using operators such as “AND,” “OR” and “NOT” to refine or expand a search. For example, by inserting “AND” between search words as in “grading AND drainage AND flood”, the search will return records in which all search terms are present. The operator “OR” is used to find instances in which one word OR another is used as a means of broadening the search and connecting concepts. The operator “NOT” is used to narrow a search as in “grading NOT flood” to allow a search to be more specific.

A search using Boolean operators allows the data set returned by the search to be more selective. To perform a Boolean search:

1. Click the arrow to the right of the Layouts icon in the Toolbar at the top of the screen:
2. Select the “Column and Image Layout” to enable simultaneous viewing of the Column View and file images.
3. Click on the Boolean Search icon (the icon that looks like a pair of binoculars) on the Column View layout.

STEP 2

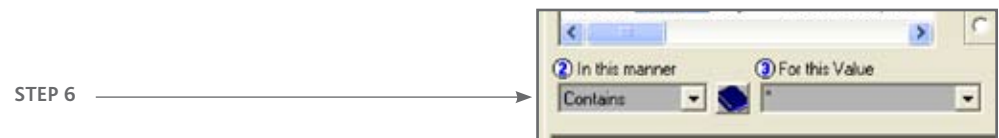
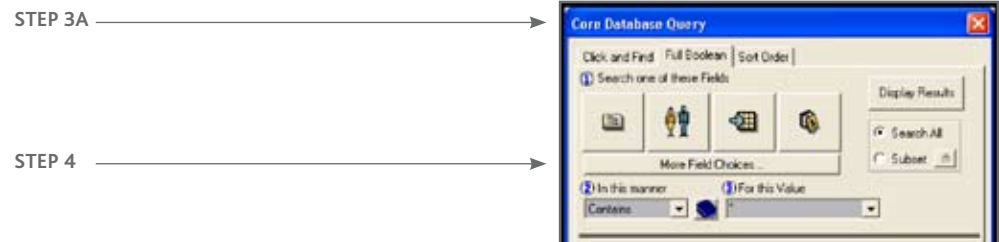


STEP 3



For example, to prepare to depose Sara Moss, the Las Mesas Town Planner noted in the sample case, one might wish to find all correspondence Ms. Moss composed in relation to the case. A standard keyword search would return all files in which Ms. Moss is mentioned, and it would be difficult to quickly sort out which of the many files returned in the search contained correspondence written by Ms. Moss.

- 3A. The “Core Database Query” window will appear.
4. Click on “More Field Choices”.
5. A list of all the fields in the case appears. Double-click the “Author” field.
6. Go to Step 2, “In this manner”, and click on the down arrow to the right of the field to search the Author field. For this demonstration, select “Contains”.

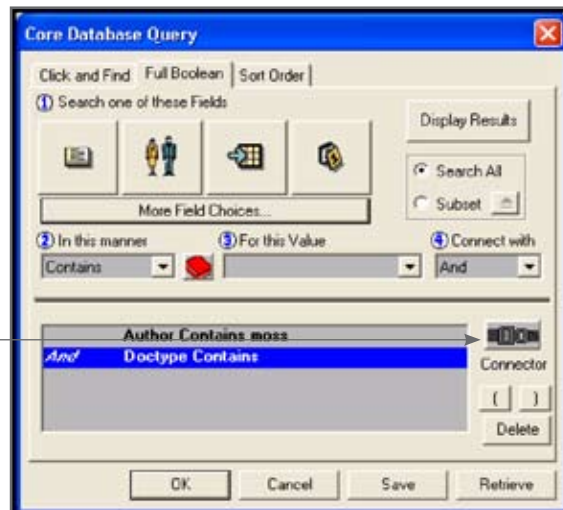


7. Go to Step 3, “For this Value”, and type in “Moss”.
8. Click on the Connector button located in the lower right portion of the Core Database Query box to add another line to the search to further refine the results.
9. Click the More Field Choices box again and this time select “Doctype”.
10. Go to Step 2 “In this manner”, and again select “Contains”.
11. Go to Step 3, “For this Value”, click on the arrow on the right-hand side of the box and select “Moss”.

STEP 7

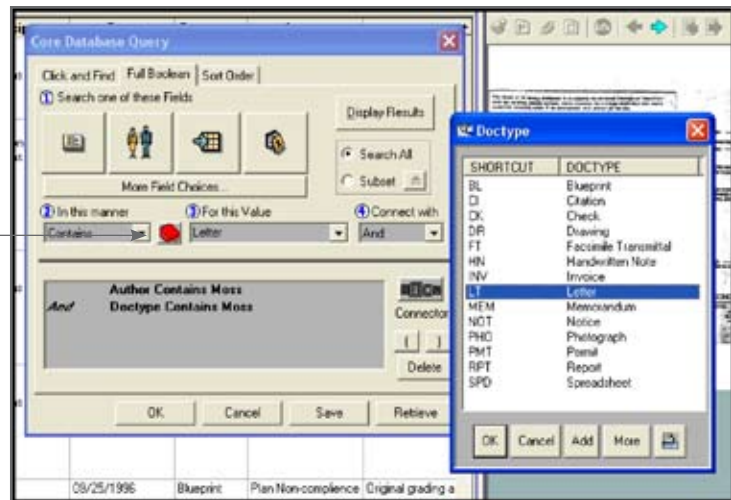


STEP 8



12. Click on the icon that looks like a small, red book to the left of the “For this Value” field. A window will appear listing the types of document in the case:
13. Click on the value “Letter” and click on the “OK” button at the bottom of the Doctype window.
14. Click on the “Display Results” button near the top right-hand side of the Core Database Query box, and the results will appear in the Column View window.

STEP 12

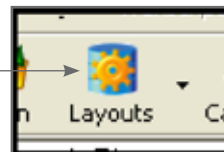


Searching the OCR Database

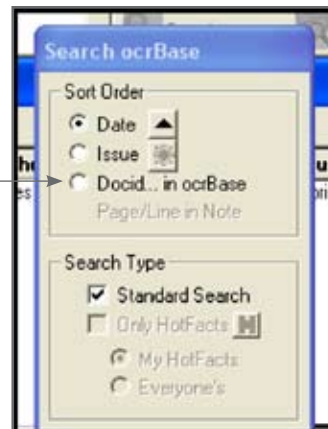
1. Click the arrow to the right of the Layouts icon in the Toolbar at the top of the screen.
2. Select the “Docked Explorer” Layout.
3. In the Case Explorer pane, select the checkbox next to the ocrBase.
4. In the Enter Search Phrase box, type in the name “Stevens”.
5. Once you enter the name Stevens, the “Search ocrBase” window will appear.

Beyond the ability to search Core Database summaries, CT Summation iBlaze users also have the ability to search the full text of any document's full text (OCR text) loaded into the case.

STEP 1



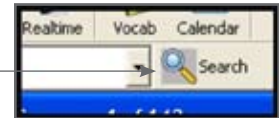
STEP 5



Note: It is important to ensure that the Search ocrBase window is visible when clicking the Search icon. In the above example, if you last clicked in the Column View window and the Search ocrBase window was not visible and you then clicked the Search icon, the search would encompass the entire Core Database and not just the ocrBase. Essentially, the last window in which a user clicks becomes the "live" window and all functions will refer to that window.

6. Select the Date option to sort the search results by date.
7. With the Search ocrBase window still visible on top of the Column View window, click the Search icon next to the search field.

STEP 7



Search Results Reports

Search results appear in the form of document excerpts:



The search terms appear in excerpts from the body of text in which they were found and are highlighted in blue. In the top right-hand corner of each excerpt, the type of excerpt is noted along with the Docid of the document to which the excerpt refers, along with the page number and line in which the search term appears.



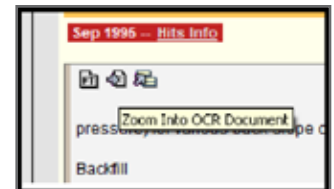
In the left-hand margin, a list of dates organized by month from oldest to newest allows users to quickly access all files within the search results for a given month:



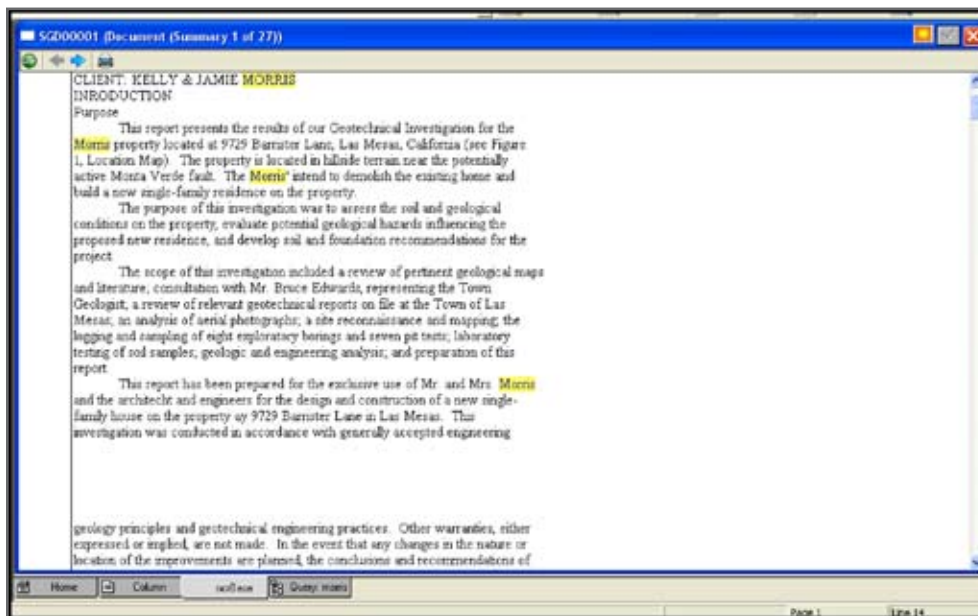
Among other functions, the toolbar along the top of the Search Results report allows users to set up the Search Results display, navigate between records and refresh and print search results:



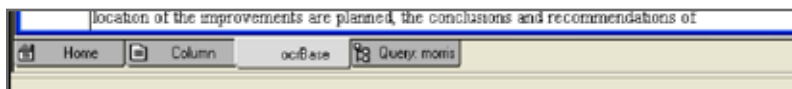
To view the actual document to which the excerpt refers, click on the second icon in the top left-hand corner of the excerpt, "Zoom Into OCR Document":



A new window containing the OCR document will appear, with all instances of the search term within the document highlighted in yellow:



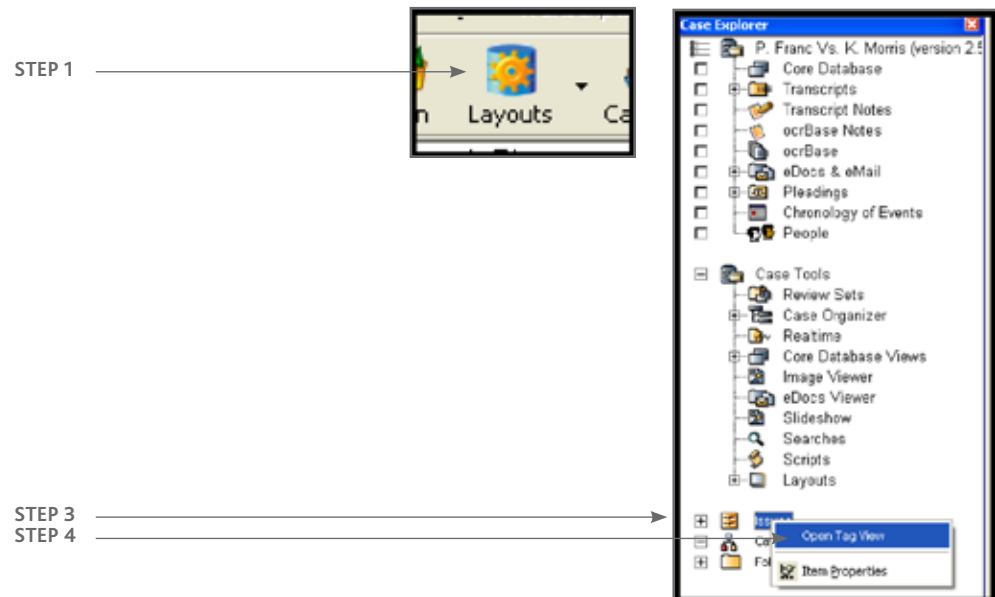
To toggle between the search results and the OCR Document, click on the "Query: morris" tab and the "ocrBase" tab at the bottom of the screen.



Assigning Issue Tags

After files are loaded into the Core Database and basic coding has been performed, users may wish to assign keywords or “tags” to files to further differentiate files or define relationships among a group or groups of files using the Tagging feature:

1. Click on the arrow to the right of the Layouts icon in the Toolbar at the top of the screen.
2. Select the “Docked Explorer Layout” so that the Case Explorer appears on the left –hand side of the screen.
3. Near the bottom of the Case Explorer, right-click on the “Issues” heading.
4. Select the option “Open Tag View” from the menu that appears.

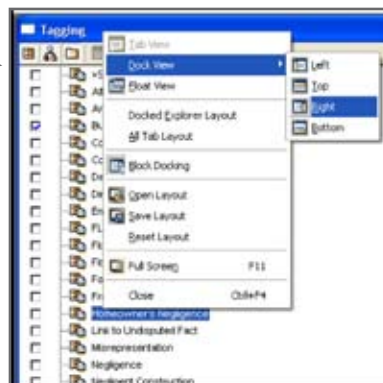


5. This will open the Tagging window in the main viewing pane.
6. Next, right-click on the blue Tagging title bar. A window will appear. Select “Dock View”, in the cascading menu, then select “Right” to move the Tagging window to the right-hand side of the display.

STEP 5



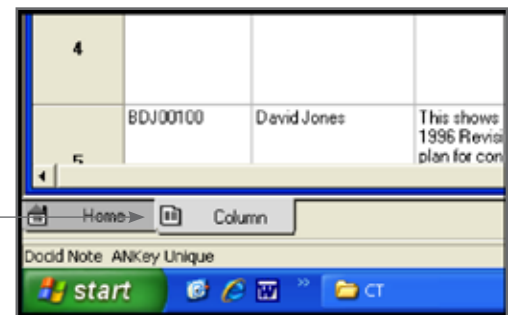
STEP 6



Tags can be added to any field that has Lookup tables associated with it. By default, an iBlaze case has Lookup tables associated with the DocType, Author, Recipient, Issue, Names Mentioned, Sources and Witness fields.

7. Close the Case Explorer window by clicking on the small red box with a white “x” in the top right-hand corner of the Case Explorer window. Next, select the “Column” tab at the bottom of the screen:
8. The Column View should now be on the left-hand side of the screen and the Tagging window on the right.
9. Select the “Issues” field of the first summary in the Column View. Note that the checkboxes in the Tagging window are automatically selected for the issues listed in the “Issues” field.
10. To add tags to the file, select the cell in the “Issues” field within the file summary. Next, select a checkbox next to an issue or issues in the Tagging window. Finally, click on the cell in the “Issues” field once again, and the issue(s) selected in the Tagging window will be automatically populated in the cell.

STEP 7

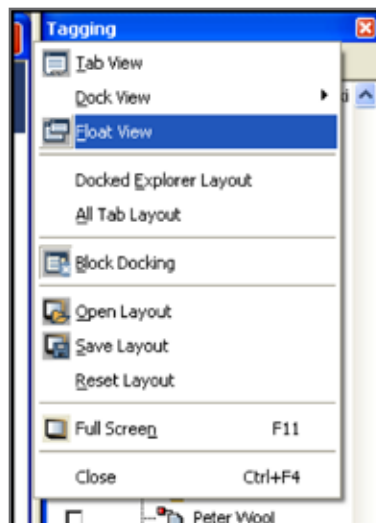


Creating Folders

To create a central repository for documents relating to a particular person, concept or issue within a case, iBlaze allows users to quickly create folders:

1. In the Case Explorer window, right-click on the “Folders” heading.
2. Select “Open Tag View”, and the Tagging window will appear.
3. Scroll to the bottom of the Tagging window to the “Folders” heading.
4. Right-click on the Personal folder and select “Add Folder beneath ’Personal’”. An “Enter new Folder name” window will appear.
5. Type in the name “Stevens” to create a witness folder for Connor Stevens and click the “OK” button.
6. Return to the top of the Tagging window and right-click in the title bar. Select “Float View”.

STEP 6



Additional folders and sub-folders can be added to further organize case materials.

7. This will cause the Tagging window to “float” and enable it to be moved anywhere on the screen.
8. Move it to a location so that both the Column View and the Tagging View are displayed.
9. Open the Column View so that you can see all the documents in your case.
10. Click on the “Retrieve All” button to retrieve all the document in the Core Database:
11. In the Enter Search Phrase box, type in the following: “author CONTAINS morris”. This search, known as a Context Search, will retrieve all documents authored by Defendant Morris.
12. Click on the summary number (the number in the gray column to the left of each summary in the Column View) of any file and drag the document from the Column View to the Tagging window and drop the document into the “Stevens” folder. Add two more files to the Stevens folder.
13. To see the list of documents that have accumulated so far in the Stevens folder, double-click on the “Stevens” folder in the Tagging window view. The documents in the “Stevens” folder will appear in the Column View.

STEP 10

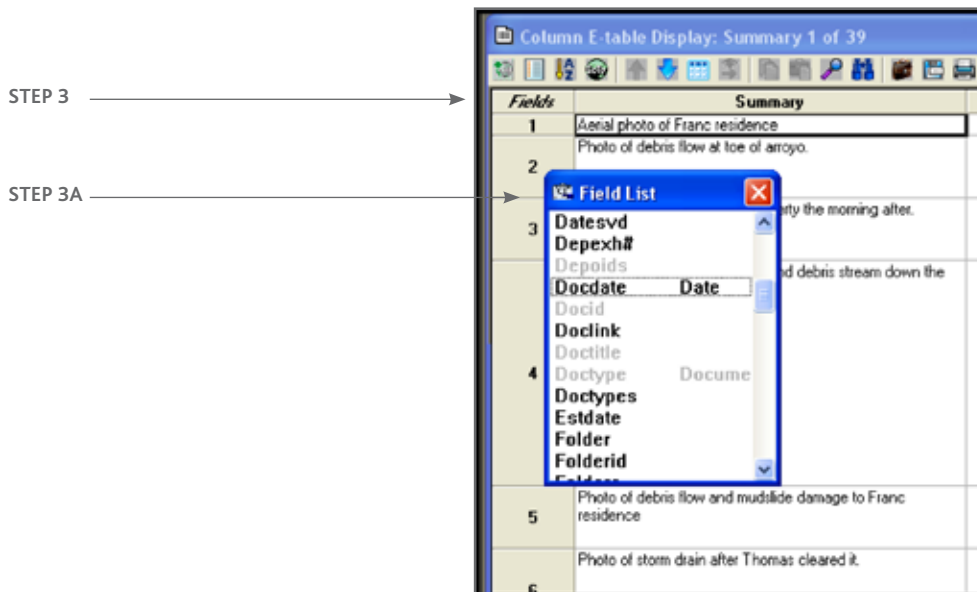
Retrieve All	Docid	Issues	Document	Author	Altynote
2	EML000003	Damages Direct Damages Consequential Damages	Spreadsheet	Peter Franc	We'll need to spring this on them at just the right time.
	EML000002	1/28/14 Creation of	Table App	Case of the Blame	

Document Production

To explore the new features, first create a new Production Set:

1. Click on the arrow to the right of the Layouts icon and select the fourth option, “Docked Explorer Layout.”
2. Type the following search into the Enter Search Phrase Box: “author CONTAINS Franc” and click on the magnifying glass icon to the right of the search field to run the search. The documents will appear in the Column View.
3. Click on the “Fields” button at the top left-hand corner of the Column View window.

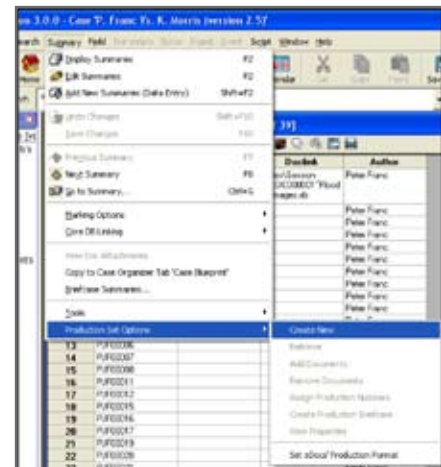
A. The “Fields List” window will appear.



Building on its industry-leading production tools, iBlaze 3.0 adds a number of features to make production even more flexible, giving users greater control over case materials while significantly streamlining the production timeline. With the ability to easily create any number of new production sets, quickly add and remove documents and renumber production sets with just a few clicks, iBlaze 3.0 makes the production process much more streamlined.

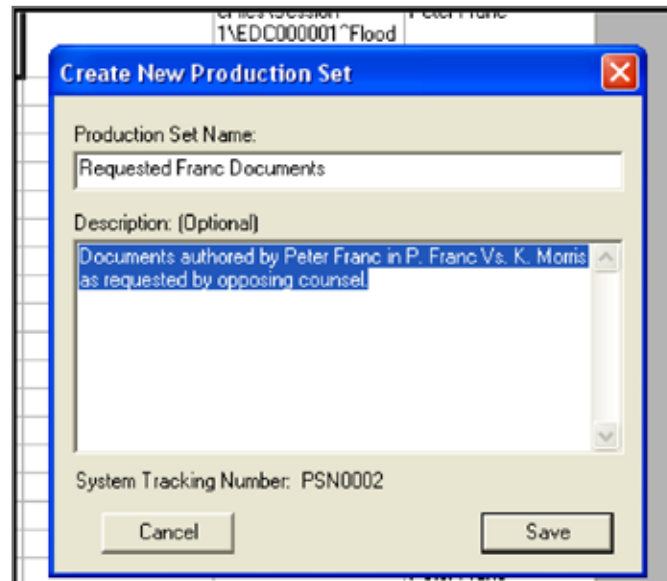
4. Fields already visible in the Column View will be listed in gray and fields in black are fields that contain data, but are not currently visible in the Column View. To select which fields will be displayed in the production, locate the name of the field within the Field List and double click on the field name to add it to the Column View. To remove fields from the Column View, double click on fields in gray in the Field List. The Docid, DocType and DocDate fields are typically the only fields included in a set of files submitted for production, but users are free to add any combination of fields they chose.
5. Sort documents by Docid, by clicking on the field header “Docid” and then selecting “Sort by Docid.”
6. Click on the Summary menu, select “Production Set Options” and then “Create New”.
7. A pop-up will appear asking, “Do you want to add the current results set to the new production set?” Click “No” as this production set will contain only the specific documents requested by opposing counsel.

STEP 6



8. The Create Production Set window will appear, prompting the user to enter a Production Set Name and an optional Description of the set. Type “Requested Franc Documents” in the Production Set Name field. In the Description field, enter “Documents authored by Peter Franc in P. Franc Vs. K. Morris as requested by opposing counsel.” Click “Save”. A window will appear to confirm that “Production All Franc Documents” has been created. Click “OK”.

STEP 8



The screenshot shows a dialog box titled "Create New Production Set" with a close button (X) in the top right corner. The dialog has a light beige background and a blue title bar. It contains the following fields and controls:

- Production Set Name:** A text input field containing "Requested Franc Documents".
- Description: (Optional):** A text area containing "Documents authored by Peter Franc in P. Franc Vs. K. Morris as requested by opposing counsel".
- System Tracking Number:** A label indicating "PSN0002".
- Buttons:** "Cancel" and "Save" buttons are located at the bottom of the dialog.

An arrow labeled "STEP 8" points to the left side of the dialog box.

Adding Documents to a Production Set

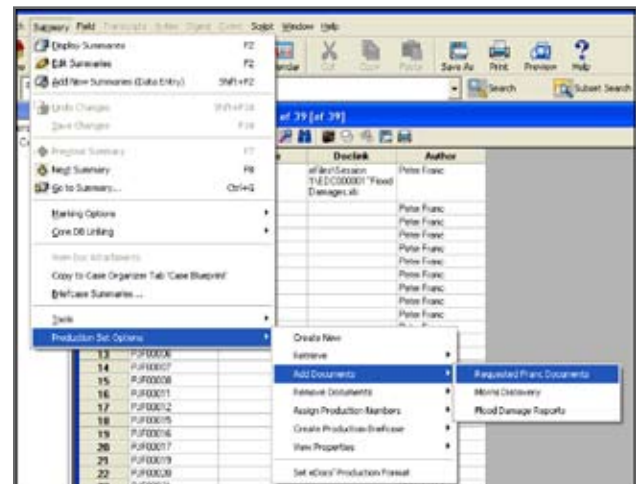
Users can create any number of production sets and quickly retrieve, add, remove and renumber documents for production in seconds using the “Production Set Options” menu.

In this example, opposing counsel has requested copies of checks as proof of payment for debris removal. As a result, the production set only needs to contain copies of the requested documents, not all documents authored by P. Franc. To see which documents are checks, click on the “Fields” button at the top, left-hand corner of the Column View window. The Fields List window will appear. Select “Summary” to insert the Summary column into the Column View in order to view descriptions of the documents.

To add documents to a production set:

1. Click on the Summary menu, select “Production Set Options”, “Add Documents” and then “Requested Franc Documents”.
2. Again, a pop-up will appear asking, “Do you want to add the current results set to the new production set?” Click “No”.

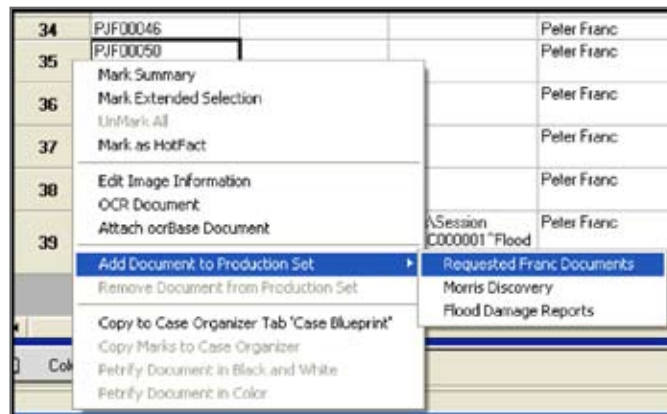
STEP 1



Adding a Single Document

1. To add a single document to this production set, Right click in cell 35 and select “Add Document to Production Set” and then “Requested Franc Documents”. The document will be automatically added to the set.

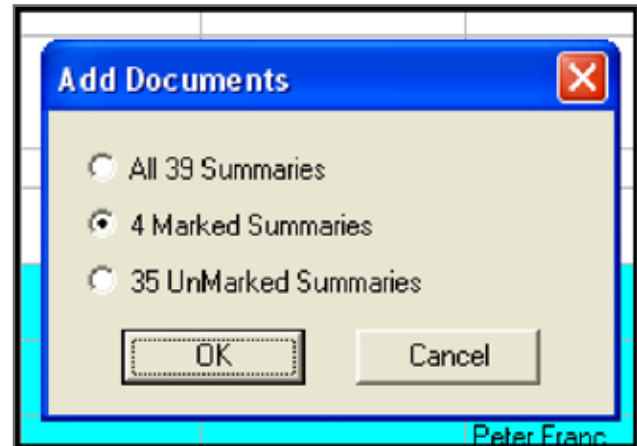
STEP 1 →



Adding Multiple Documents

1. To add several documents at once, click on cell 36, depress the “Shift” key and click on cell 39 to highlight all four rows.
2. Click on the Summary menu, select “Production Set Options”, “Add Documents” and then “Requested Franc Documents”.
3. The “Add Documents” window will appear with the option to select all documents within the search results, only the four selected documents or all unmarked documents. Select “4 Marked Summaries” and click “OK” to add the four documents to the set.

STEP 3 →



Retrieving and Reviewing Production Sets

To retrieve and review production sets to insure all documents have been added correctly:

1. Click on the Summary menu, select “Production Set Options”, “Retrieve” and then “Requested Franc Documents”. The five documents added to the production set should appear within the Column View pane.

STEP 1



Field#	DocId	DocTitle	DocLink	Author	Summary
1	FJF0043			Peter Franc	Photograph by Peter Franc of seat on foot. It ash extended from toes to thigh on both legs. Sideshow.
2	FJF0051			Peter Franc	Check copy - payment for debris removal.
3	FJF0050			Peter Franc	Check copy - payment for debris removal.
4	FJF0053			Peter Franc	Check copy - payment for debris removal.
5	PJF0054			Peter Franc	Check copy - payment for debris removal.

Upon review, it appears that a document that is not a check, PJF0049, has been erroneously added to the production set and needs to be removed.

Removing a Document from a Production Set

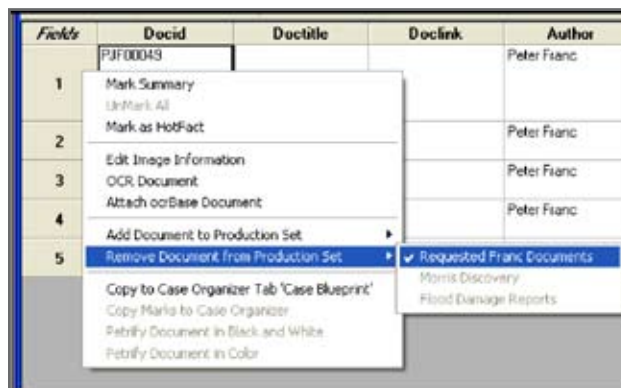
To refresh the production set to show only the documents currently contained in the set, select the Summary menu, "Retrieve Production Set" and then "Requested Franc Documents". The Column View will refresh to show only the four documents remaining in the set.

To remove a document from a production set:

1. Right click on the cell number of the document to be removed, in this case cell 1.
2. Select "Remove Document from Production Set" and then "Requested Franc Documents".

The document is removed from the set but its grayed-out row remains to remind the user that a document has been removed, yet still available in case the reviewer would like to add or alter the document again.

STEP 2 →



Assigning Production Numbers

To assign production numbers to the documents in a production set:

1. Select the Summary menu, “Assign Production Numbers” and then “Requested Franc Documents”.
2. The “Assign Production Numbers” window will appear. In the “Enter New” field, type “0001”. Click “OK”. Production numbers have now been automatically assigned to all documents within the set.

When adding, removing or otherwise editing productions sets, users can quickly edit production numbers within the “Assign Production Numbers” window. Users have the option to continue adding numbers in the sequence for new documents or renumber all documents within a set by overwriting previous production numbers.

Turning Over Production Sets – Briefcase Creation

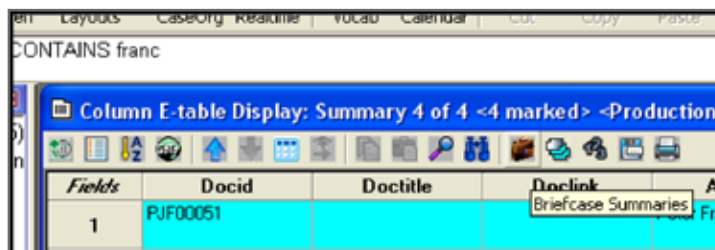
Once all relevant case documents have been added to a production set, the Briefcase feature allows users to quickly turn production sets into production-ready files. The Browser Briefcase allows users to create a Web page with the produced files and/or grant access to the courts as well as outside and/or opposing counsel in .PDF and .TIFF file formats.

To create a Briefcase:

1. Click on the Briefcase Summaries icon in the Toolbar at the top the Column View:
2. A window will appear asking whether you wish to create a Production Briefcase or a standard Briefcase. Click “Yes” to create a Production Briefcase..
3. A “Choose Columns for Briefcase” window will appear prompting users to select the columns they wish to include in the briefcase. Select all four columns and click “OK”.

Note: Only fields in the current Column View will be reported and produced. DO NOT SELECT “Briefcase all columns” at this step. Doing so will include every column in the Core Database Column View including all work product and analysis.

STEP 1 →



4. A “Production Briefcase Image Markups” window will appear asking users whether or not they wish to “Burn-In”—or permanently include—redactions and stamps in the production. Select “Do not copy image Markups” and click the “OK” button.
5. A “Specify Briefcase Purpose” window will appear. Choose the “iBlaze use and review” option and click the OK button.
6. A “Briefcase Documents’ Electronic Versions” window will appear allowing users to choose how they wish to format the documents included in the briefcase. Users may choose to produce documents in “Native” or “Petrified” format. Select “Petrified” for the “eMail default format”, “eMail Attachment default format” and “eDoc default format” options. In the “Package non-Petrified eMails within...” section, select “HTML”. Insure that “Briefcase OCR Text” is not selected and click the “OK” button to start the Briefcase creation process

STEP 6



7. Once the Briefcase creation process has been completed an “SWDBTools” window will appear asking if the user would like to view a log of the process. Click “No”.
8. Once completed, you will see a folder entitled “Requested Franc Documents” listed in your “Collections” folder in the Case Explorer.
9. Double click on the “Requested Franc Documents” Briefcase folder to retrieve the files.
10. Click on the Options menu at the top of the window and select “Export Data and Images to Browser Briefcase”.
11. A window will appear asking if the user wishes to export images in PDF format. Click “Yes”.
12. When asked to select a folder in which to store the Browser Briefcase, select the appropriate folder on your desktop or in your “My Documents” folder and click the “OK” button. The briefcase will be created in the selected folder.

STEP 10



13. To open the Briefcase on your computer, open the “Requested Franc Documents” folder you just created and double-click on the “index” document.
14. Opening the “index” file will open a page in the default Internet browser which contains a list of the produced files with links to each file in PDF format.

Because the Briefcase uses PDF format, the Briefcase folder can be duplicated and transferred to a CD, DVD, memory stick or other storage media and easily accessed by other users without the need to have iBlaze or other CT Summation software loaded on their computer. The only software required to view the files are a web browser and a PDF reader.

STEP 13



STEP 14

Requested Franc Documents					
Linked Doc	Docid	Doctitle	Doclink	Author	Summary
	0001			Peter Franc	Check copy - payment for debris removal.
	0002			Peter Franc	Check copy - payment for debris removal.
	0003			Peter Franc	Check copy - payment for debris removal.
	0004			Peter Franc	Check copy - payment for debris removal.

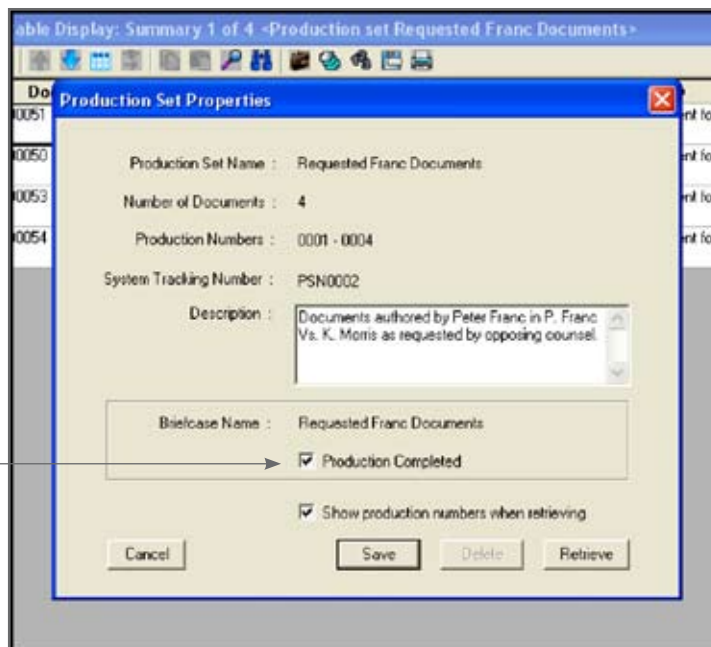
Completing Production

Now the “Requested Franc Documents” set will no longer be available for editing, but the set can be retrieved and/or deleted by users with the proper permissions at any time. Further, users can uncheck the “Production Completed” box if they wish to activate the set again in order to perform additional edits.

Once the production process is complete, users may remove completed production sets from the action menu items so that users can no longer add, remove or otherwise edit a given production set. To complete production:

1. Click on the Summary menu, select “Production Set Options”, “View Properties” and then “Requested Franc Documents”.
2. The “Production Set Properties” window will appear. Click the “Production Completed” check box and then click “Save”.

STEP 2



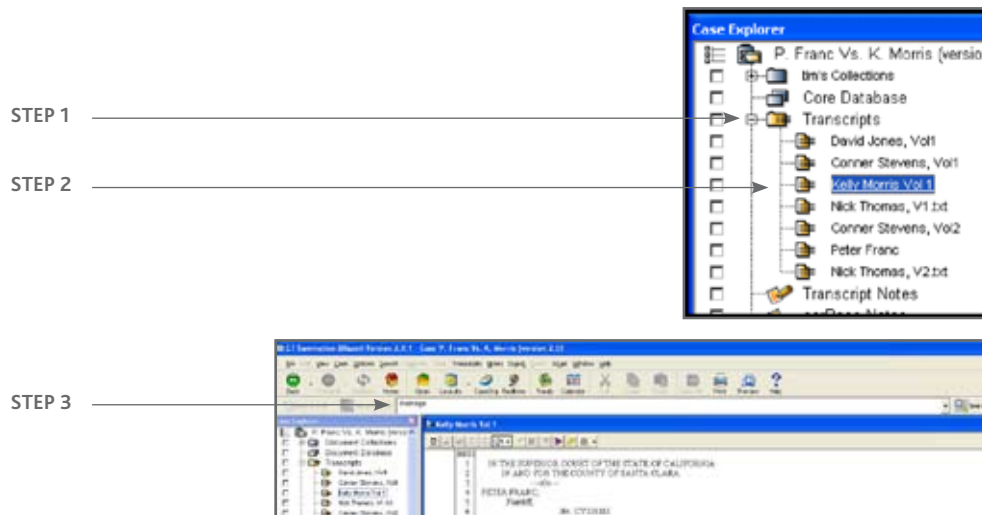
Transcript Manager

1. Open the Kelly Morris deposition by clicking on the “+” box to the left of the “Transcripts” folder in the Case Explorer pane:
2. Double-click on the “Kelly Morris Vol 1” deposition to open the transcript.
3. Type the word “drainage” in the Enter Search Phrase box above the transcript window and click on the Search icon to the right of the search box:
4. The search locates the first instance of with word “drainage” within the transcript.
5. Click the search icon again to find the next instance of the word “drainage” on page 19, Line 6.

(Note: The next demonstration builds on this initial search. Please continue on next page.)

SEARCHING TRANSCRIPTS

One of the most popular features of iBlaze is the Transcript Manager, allowing users to easily summarize, highlight, search and organize transcribed testimony in a variety of formats. For example, to capture and note instances of the word “drainage” in Defendant Kelly Morris’s deposition.



Summarizing, Organizing and Notating Transcripts

iBlaze allow users to quickly analyze, organize and prepare transcribed testimony. One of the primary uses of this feature is to prepare for the cross examination of a witness to ensure that the witness' trial testimony is similar to their deposition testimony. For example, in preparing for the cross examination of Defendant David Jones, his testimony about the drainage plan on the Morris property is of particular interest.

To find this information:

1. Double-click on the “David Jones, Vol 1” deposition from the list in the “Transcripts” folder located in the Case Explorer.
2. In the Search Phrase box, type “drainage & plan” and click the search icon to the right of the search field to perform what is known as a proximity search. This search will locate instances within the transcript where the word “drainage” appears within five lines of the word “plan”:
3. Continue to click on the search icon until the instance located on Page 17, Line 15-16. Note the question and answer dialogue that runs from Page 17, Line 15 to Page 17, Line 25.
4. Click and drag the cursor from Line 15 down to Line 25 to highlight the testimony.

STEP 2

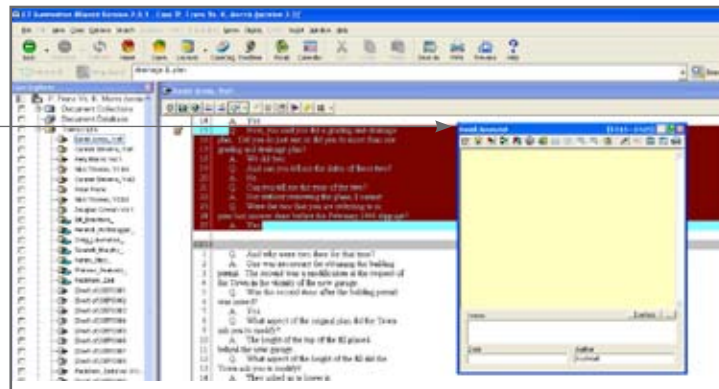


STEP 3



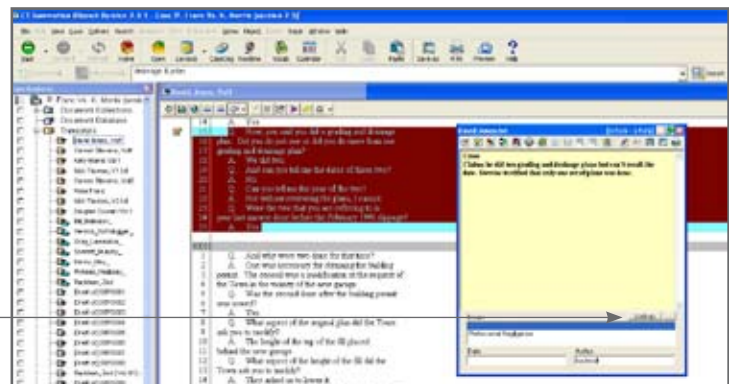
5. Move the pointer to the column to the left of Line 15, until pointer turns into a hand-shaped icon, and double-click to launch the Note tool. A window will appear. The title bar will include the name of the deponent and the range of lines highlighted within the transcript:
6. The Note tool contains several features to allow users to classify and categorize notes. Type the word “cross” into the notation field at the top of the Note, and press Return on your keyboard and continue typing the following text on the line below: “Claims he did two grading and drainage plans but can’t recall the date. Stevens testified that only one set of plans was done.”

STEP 5



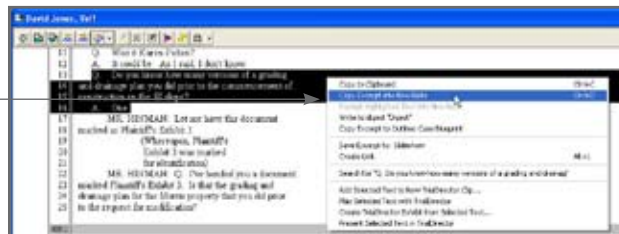
7. Next, click on the “Lookup” button to the right of the word “Issues.” A window will appear. Double-click on the “Professional Negligence” heading to select it as the issue for this Note.
8. The “Author” field will be pre-populated with the user’s login name. Enter today’s date or another relevant date, such as the date to which the testimony refers, in the “Date” field. (Tip: Use the F4 key to insert today’s date.)
9. Close the Note window. A window will appear prompting the user to save the information entered. Click “Yes” to close the window and save the Note.
10. Return to the Search Phrase box and click the search icon key again until the search result on Page 20, Line 14 is reached.

STEP 7



11. Highlight Page 20, Lines 13-16. Right-click to bring up a sub-menu. Choose “Copy Excerpt into New Note”
12. Add the word “Cross” in the Note above the excerpted text. Click on the “Lookup” button and add the “Engineer’s Negligence” issue from the window that appears, enter the desired date.
13. Close and save the Note.

STEP 11



STEP 12



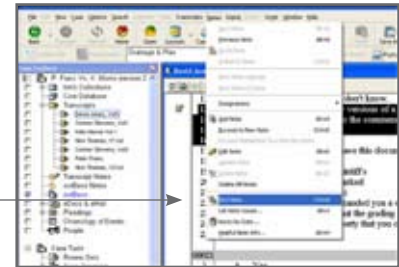
Using Notes for a Cross Examination Outline

By adding Notes to depositions, users can easily summarize depositions and begin to build cross-examination outlines for witnesses. By adding specific words to the body of a Note, users can then search for those terms to produce an outline of the Notes related to that keyword.

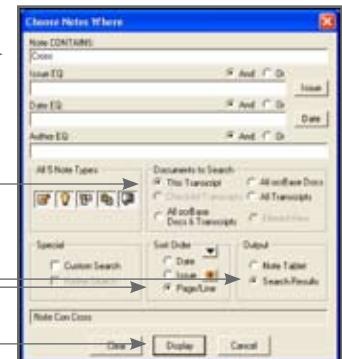
To prepare for the cross examination of Defendant David Jones, search for all the Notes that contain the word “Cross” in the body:

1. With the David Jones deposition open, select the Notes menu from the main menu toolbar at the top of the screen. Select “Find Note”.
2. The “Choose Notes Where” window will appear. In the “Notes CONTAINS:” box, type in the word “Cross” and leave the “Issue,” “Date” and “Author” fields blank. In the “Documents to Search” box, select “This Transcript.” In the “Sort Order” box, select “Page/Line.” In the “Output,” select “Search Results.” Lastly, click on the “Display” button at the bottom of the page to run the search.

STEP 1

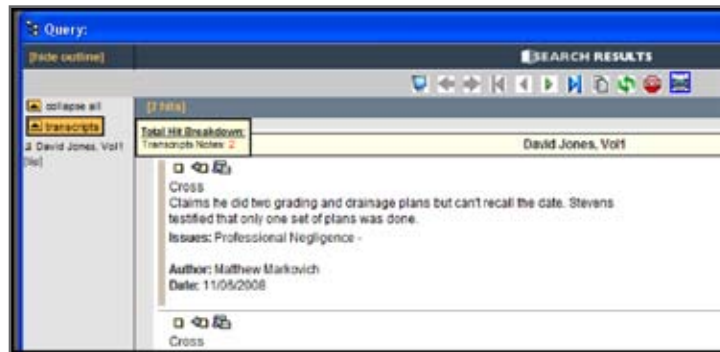


STEP 2



3. A “Search Results” window will appear.

STEP 3 →



Simply print the Search Results report for use as an outline that includes all Notes that contain the word “Cross.” The results include the page and line reference and the body of the Note in deposition page and line order.

Transcript Digests

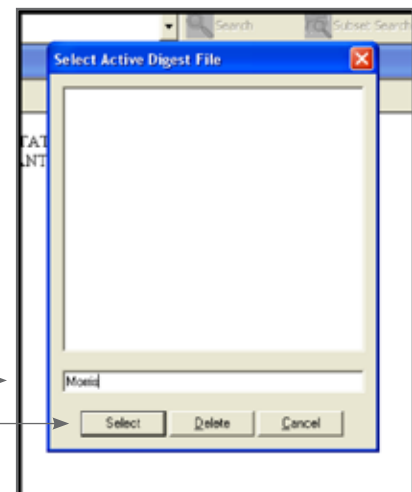
One of the easiest ways to summarize a deposition is to use the Digest feature to simply pull out key testimony and place it into a separate document that can be viewed later. The Digest feature allows users to categorize deposition testimony in a variety of ways.

To pull out key opinion testimony from Defendant Kelly Morris's deposition, search for the word "opinion" in his deposition and extract the testimony to create a digest:

1. Open the Kelly Morris deposition by double-clicking on the "Kelly Morris Vol 1" deposition in the Transcripts list.
2. Select the "Digest" menu from the main menu toolbar at the top of the screen and click on the option "Select Active Digest File." A window will appear that describes the function of the "Select Active Digest File." Click on the "OK" button to continue.
3. The "Select Active Digest File" window will appear. In the bottom field, replace the term "Digest" with the name "Morris" to label the active digest file for all of your excerpts.

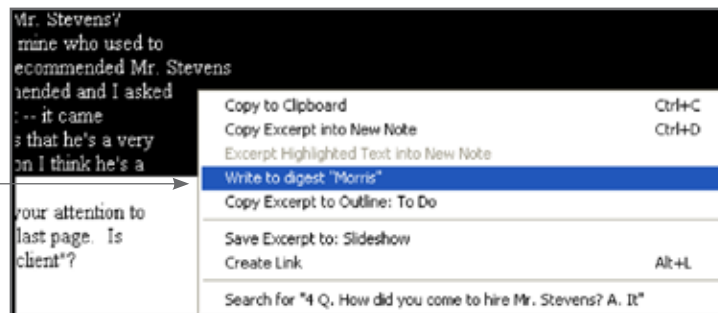
A. Then click the "Select" button to activate the file.

STEP 3 →
STEP 3A →



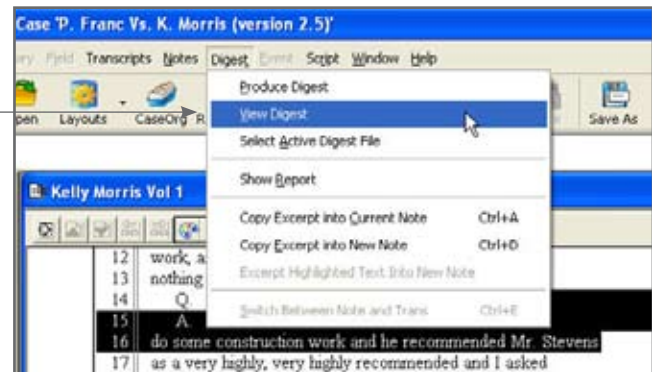
4. In the Kelly Morris transcript, type the search term “opinion” in the Enter Search Phrase box. Click the Search icon to the right of the search box.
5. The first hit should be on Page 17, Line 20. Scroll up through the transcript to Line 14 to view the preceding question and answer in order to “digest” the entire exchange. Click and drag to highlight the entire question and answer, Page 17, Lines 14-21.
6. Once you have the testimony highlighted, right-click in the middle of the highlighted area (now a black background with white letters). Select the “Write to Digest ‘Morris’ ” option. This action will place that testimony in a digest file.
7. Repeat the search again by clicking on the Search button. The next hit should be on Page 24, Line 20. Again highlight the testimony including the full question and answer preceding the hit, Page 24, Lines 11-20.
8. Repeat the steps above to “Write to Digest ‘Morris.’”

STEP 6

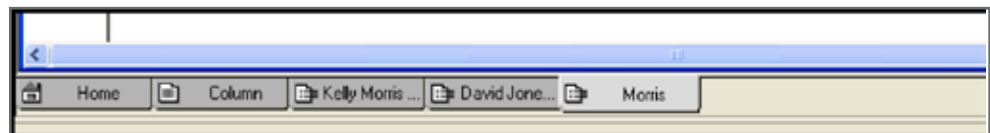


9. Go to the Digest menu and select the View Digest option.
10. The “Open Digest” window will appear. Click on “Morris” and then click the Open button.
11. A summary of all the deposition excerpts placed in the “Morris” digest will appear, containing the deponent’s name and the page and line at the beginning of each excerpt.

STEP 9



Users can quickly toggle between digests and transcripts using the tabs at the bottom of the main viewing pane.

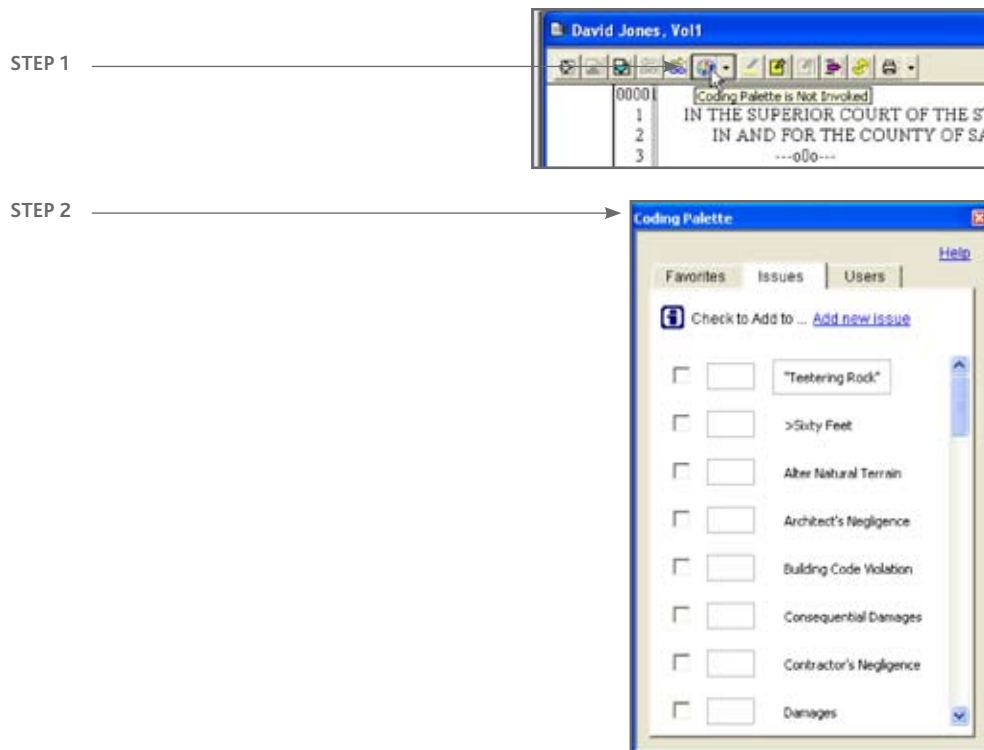


Highlighting Transcripts

Follow the steps below to use the Highlighting tool to color-code a transcript by issue:

Open the David Jones deposition by double-clicking on the “David Jones, Vol1” deposition in the Transcripts list.

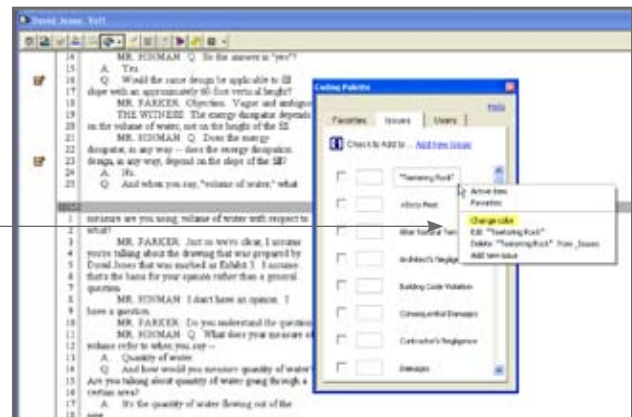
1. Click on the Coding Palette button to activate the highlighting feature:
2. The “Coding Palette” window will appear



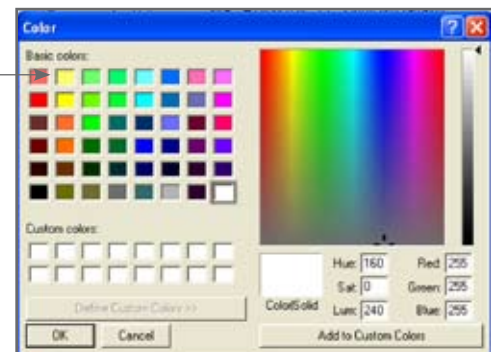
The Highlighting tool allows users to color-code transcript passages and assign colors based on issues or members of a review team. Users can create Favorites to quickly access frequently used issues, change highlight colors “on-the-fly”, filter and print transcript excerpts by color. These Highlighting features can be used to summarize depositions, note party designations for trial or assist in creating an outline for cross-examination.

3. Right click on the first issue, “Teetering Rock”. A menu will appear. Select the “Change color” option from the menu:
4. The “Color” window will appear. Click on the yellow square to select yellow as the color for this issue, and click the “OK” button in the bottom left-hand corner to close the window:

STEP 3

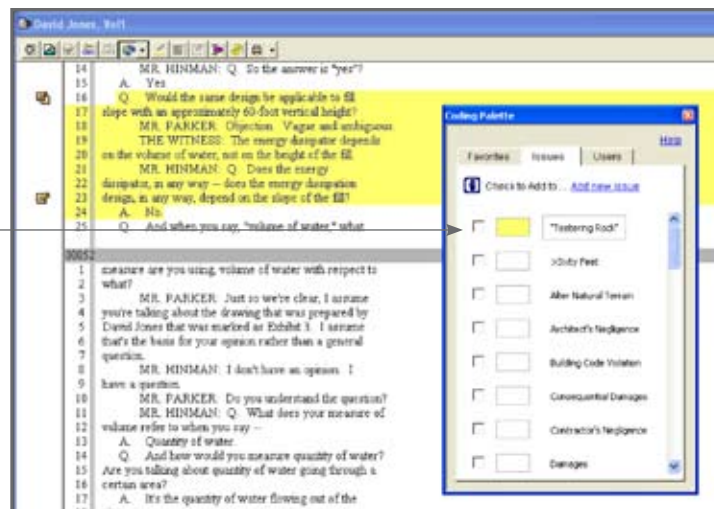


STEP 4



5. Next, type the word “design” in the Enter Search Phrase field above the Transcript window. Click on the Search icon to the right of the search box. The first hit should occur on Page 51, Line 16.
6. Click and drag the cursor over the question and answer on Page 51, Lines 16-24 to highlight the exchange. Click on “Teetering Rock” in the Coding Palette window to highlight the text with the color assigned to “Teetering Rock”.

STEP 6

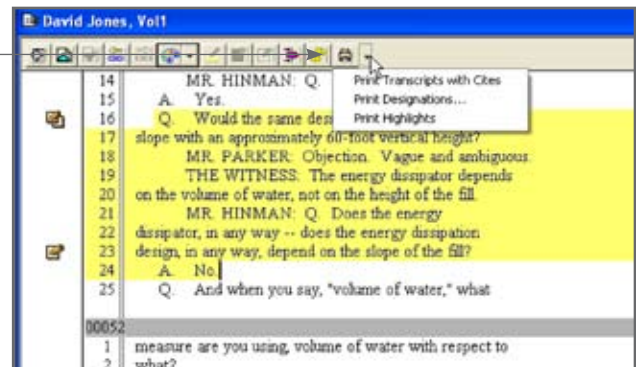


7. Click on the down arrow to the right of the Print icon in the Transcript View toolbar and select the option “Print Highlights”.
8. The “Print Highlights” window will appear. Select “With Highlights”, “With Notes” and “This Transcript” and click the “Preview” button.

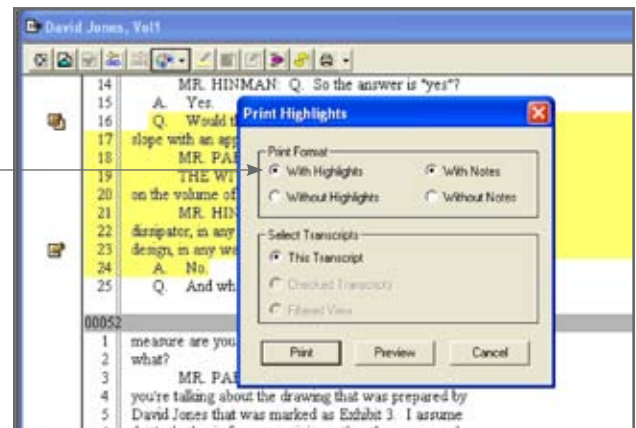
Print Preview demonstrates how the document will appear when printed. Note that when scrolling through the Print Preview, all highlights and notes added to transcript are included.



STEP 7

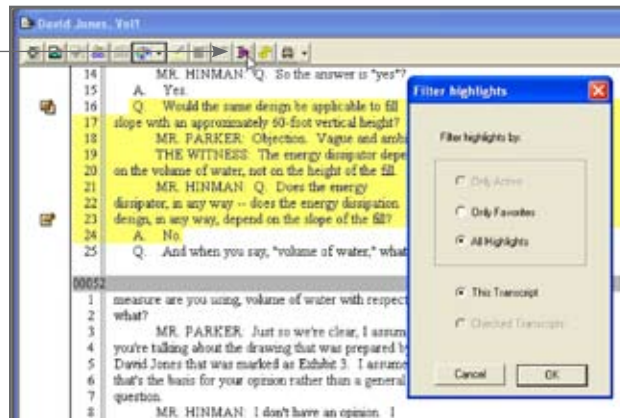


STEP 8

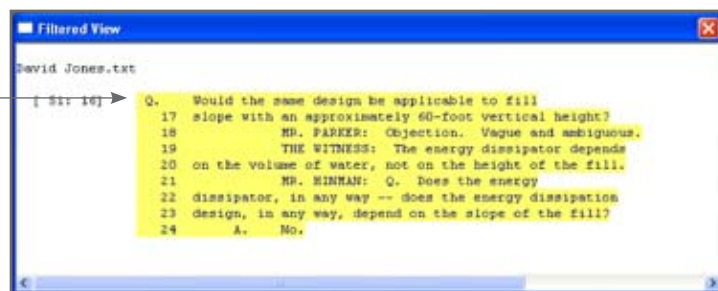


9. To filter the transcript to display specific highlighted portion(s), go to the toolbar and click on the Filter icon at the top of the Transcript View.
10. The “Filter highlights” window will appear. You have the option to filter “Only Favorites” or “All Highlights”. Select “All Highlights” and click the “OK” button.
11. The results will display all highlighted testimony in the transcript.

STEP 9



STEP 11



Redaction

iBlaze 3.0 adds a number of tools to the platform's already robust Redaction and Review tools including:

- Reason for Redaction: Enables users to create a label for each redaction so they can quickly see why specific items within a document have been redacted. Users may also adjust redaction settings to enable up a pop-up window to prompt users to provide a reason for each redaction each time a new redaction is created.
- Transparent Redaction: Allows users to simply mouse-over redacted information to reveal the image or text below for quick review.
- Global Redact: Redact the same section of each page across an entire document. Search for all redacted documents

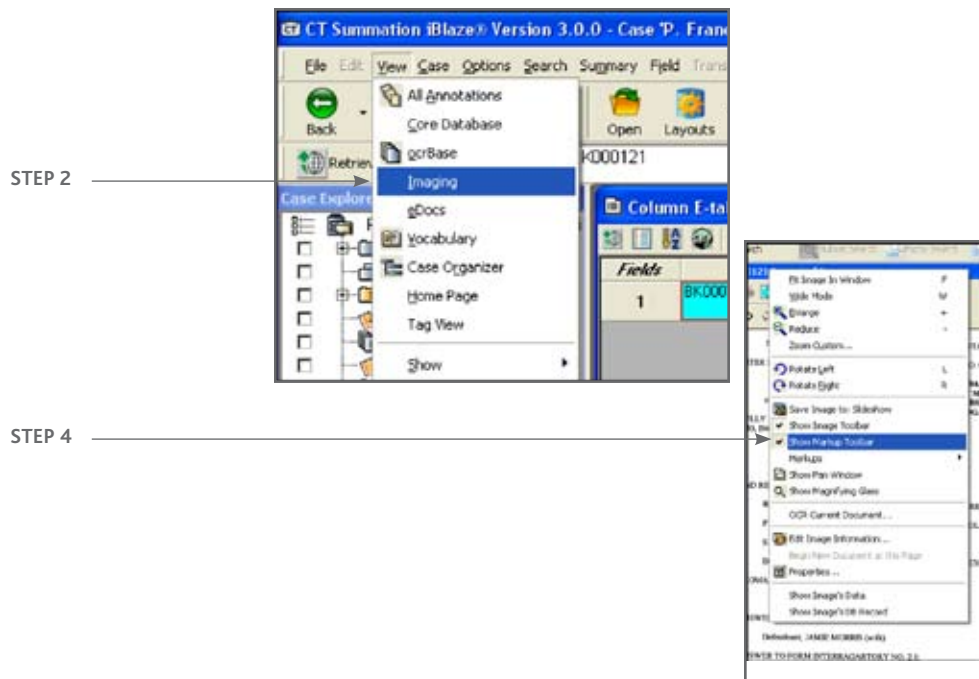
To begin exploring the new features of the iBlaze 3.0 Redaction and Review Module, follow the steps below:

1. Double click on the Core Database in the Case Explorer pane. In the Search Phrase box, type "BK000121" and click the Search icon to the right of the search field to retrieve document BK000121.

STEP 1



2. Go to the View menu and select Imaging.
3. The Image pane will appear next to the Column View pane displaying a copy of a six-page document. To make the document easier to view, widen the pane and click on the “Enlarge” icon (the magnifying glass with a plus sign) in the icon bar at the top of the Image pane.
4. To enable redactions, place the cursor over the document, right-click and select “Show Markup Toolbar” from the menu that appears.



5. The Markup Toolbar will appear at the top of the Image pane. Click on the “Redact” icon in the Markup Toolbar. Within the document the cursor will now appear as a plus sign, allowing users to click and drag to create redaction boxes.
6. Locate the Bates Stamp (BK000121) in the lower right-hand corner of the page. Click just above and to the left of the Bates stamp and drag the cursor to create a box that covers the number.

STEP 5



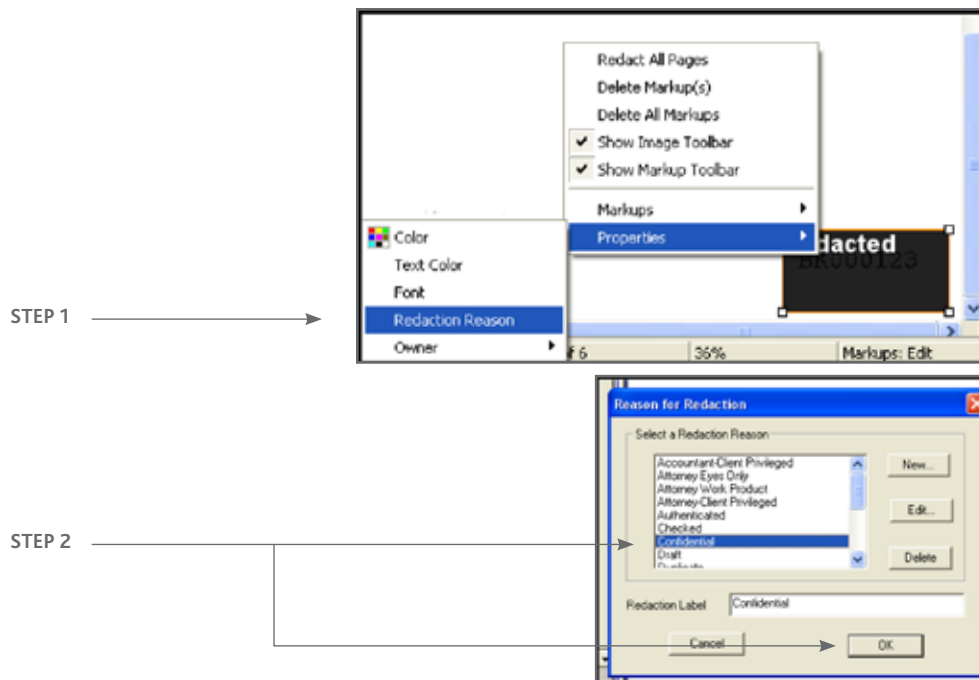
STEP 6



Reason for Redaction

To insert a specific reason for a redaction or set of redactions::

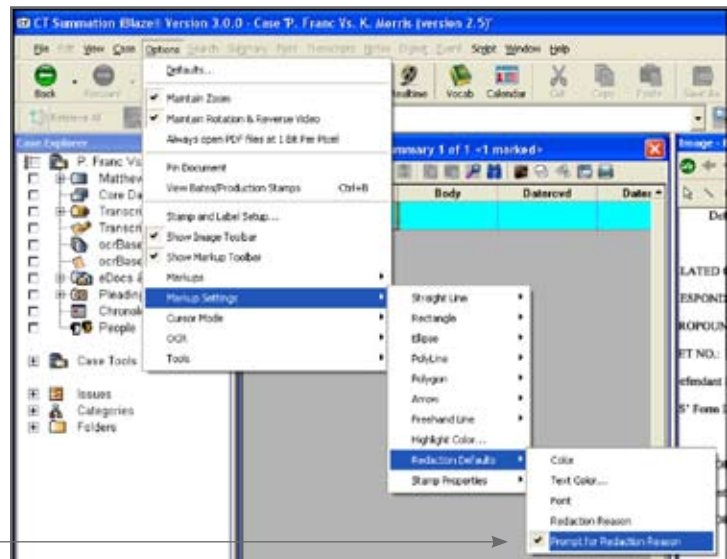
1. Right-click within the redacted portion of the page, mouse over “Properties” and select “Redaction Reason”.
2. The Reason for Redaction window will appear offering a list of frequently used reasons, as well as the ability for users to add their own in the “Redaction Label” field. For the purposes of this demonstration, select “Confidential” from the list and click the “OK” button.



- The word “Confidential” should now appear within the redacted portion of the page. Users can assign individual reasons to each redaction or use the Global Redact feature (see below) to assign the same reason for all redactions within a Global Redaction set.

Tip: As a reminder to enter a Reason for Redaction each time a redaction is added, administrators and individual users can adjust the Markup Settings to automatically launch a “Prompt Redaction Reason” window.

- From the Options menu, select “Markup Settings”, the “Redaction Defaults” and then “Prompt for Redaction Reason”.



Search for Redacted Documents

Along with the new redaction features, iBlaze 3.0 automatically creates a #RDCTD field and assigns each redaction a unique number within that field each time a new redaction is added. This new field allows users to quickly find all redactions within a set of documents, or an entire case, simply by selecting the material to be searched, typing “#rdctd exists” into the Search Phrase field and clicking on the Search icon. A list of redacted documents will automatically appear in the Column View.

Transparent Redaction

Note: When documents containing redactions are produced, all redactions are automatically rendered opaque.

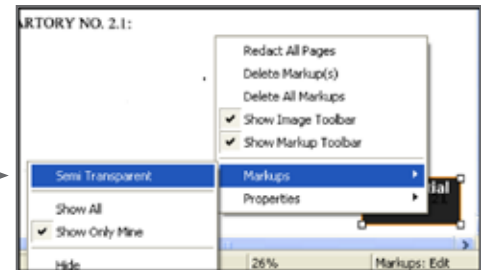
Users can adjust the settings for redactions to allow them to be opaque or shift to become semi-transparent when moused over. To adjust the transparency of redactions:

- 1A. Right click on the redacted portion of the page. Select “Markups”, then “Semi Transparent” to make the redaction semi-transparent when moused over.

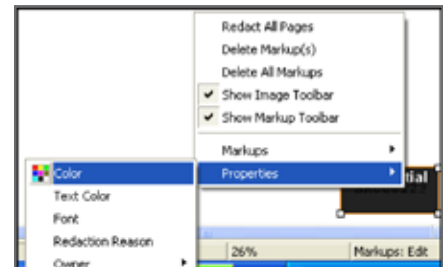
To make redacted information easier to view in a semi-transparent state, it can be helpful to alter the color of the redaction field. To adjust the color of redaction fields:

- 1B. Right click on the redacted portion of the page. Select “Properties”, then “Color” and a color palette will appear. Select the red square to change the color of the redaction to the color red.

STEP 1A



STEP 1B



Global Redact

To use the Global Redact feature to hide all Bates Stamps within the document:

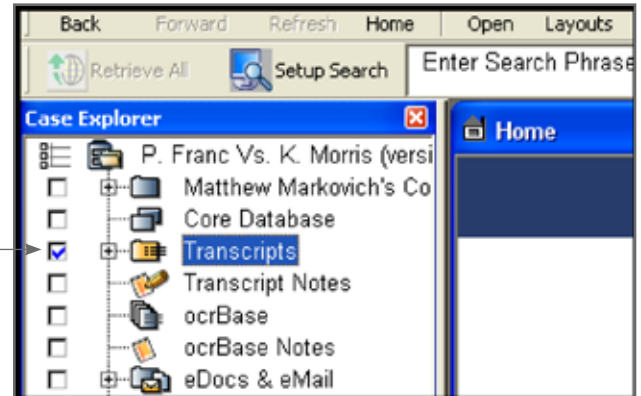
1. Right-click within the redacted section of the page and select “Redact All Pages” from the menu that appears
2. A pop-up window will appear asking the user to verify that they wish to apply the redaction to all pages. Click “Yes”. If you wish to verify that the redaction has taken place correctly, click on the blue arrow icon in the menu bar of the Image pane to scroll through the pages of the document.

Tip: All formatting and settings are copied from the initial instance of the redaction used in a Global Redact set. Please ensure all formatting (color, font, Reason for Redaction, etc.) and settings (semi-transparent, user permissions) are correct before using the Global Redact feature. Changing formatting or settings and selecting “Redact All Pages” again will overlay multiple, additional redactions on top of existing redactions.

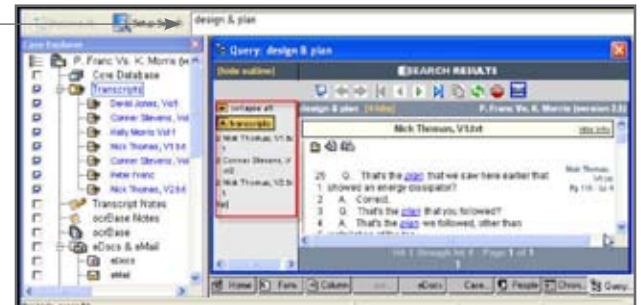
Searching Multiple Transcripts

1. To include all transcripts, select the check box to the left of the Transcripts folder in the Case Explorer pane:
2. In the Enter Search Phrase box, type in “design & plan.” Click the “Search” icon to the right of the search field.

STEP 1



STEP 2

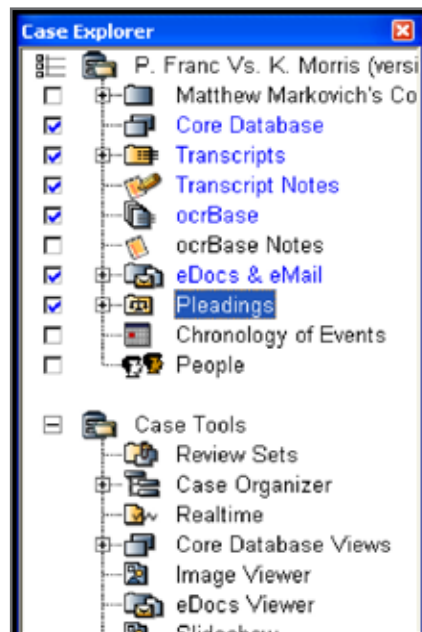


The Search Results report will display all the instances in which the word “design” appears within 5 lines of the word “plan” in every transcript in the case.

In addition, it may be helpful to quickly find key words not only in the testimony portion of your case, but also in the overall database of files, Notes and coded or indexed summaries of case files. iBlaze is the only case management software system which allows users to perform a Blended Search—the ability to run searches on all areas and categories of a case in a single search. Building on the last example, search the entire case for the words “design” and “plan”:

1. In the Case Explorer pane, click the checkbox to the left of the folders “Core Database,” “Transcripts,” “Transcript Notes,” “ocrBase,” “eDocs & eMail” and “Pleadings.”

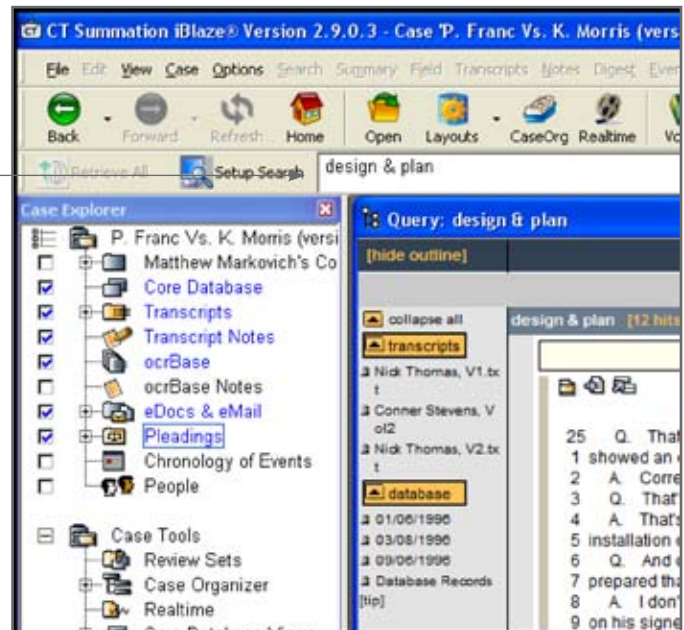
STEP 1



2. In the Enter Search Phrase box, type in “design & plan.” Click the Search icon to the right of the search field.

The Search Results report will show all of the hits in each category. Users can easily navigate through the different kinds of documents by clicking on the quick links in the outline view in the column to the left of the Search Results report.

STEP 2



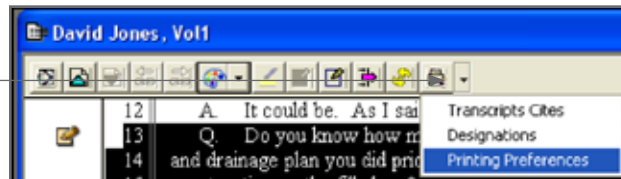
Condensed Transcript Printing and Display

iBlaze 3.0 includes the ability to print two or four pages of a transcript on a single sheet of paper, as well as view multiple pages on a single screen within iBlaze, making it easier to visually scan transcripts without having to shuffle papers or repeatedly click back and forth between individual pages. Users can also choose to print condensed transcripts with or without Notes and Highlights. Users can now significantly reduce the use of paper as well as the overall size of cumbersome hard copies, while retaining the ability to include, or exclude, customized formatting, highlighting and Notes.

To adjust the format of a transcript:

1. Click on the small black arrow next to the Print icon at the top of the Transcript View and select “Printing Preferences” from the dropdown menu.
2. Select the “Condensed” tab as shown below.

STEP 1



STEP 2



Within this tab, users may set options for the “This Transcript” or “Checked Transcripts”, which applies changes to all transcripts selected in the Case Explorer. Users may then select the “Page Format” (two or four pages), control the orientation of the pages with “Style Format” and adjust the “Print Format” to include highlights and notes.

Evidence Links

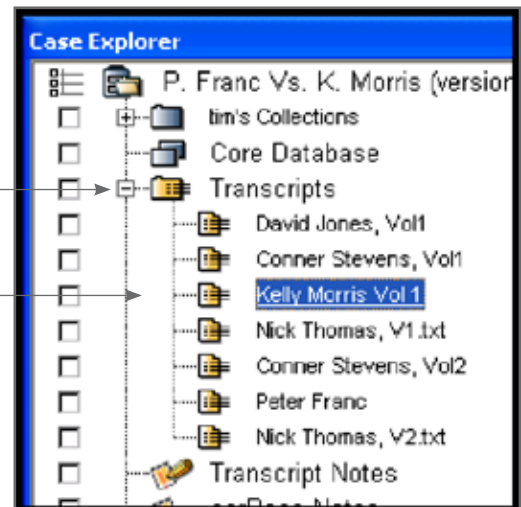
While reviewing transcripts, users may wish to view corresponding exhibits to which deposition testimony refers. iBlaze allows users to create links between testimony and any file in the case and view them simultaneously. The “Evidence Link” feature is similar to a hyperlink on a web page.

To create an Evidence Link, follow the instructions below:

1. Open the Kelly Morris deposition by clicking on the “+” box to the left of the “Transcripts” folder in the Case Explorer pane.
2. Double-click on the “Kelly Morris Vol 1” deposition to open the document.
3. Scroll down Page 11, Lines 15-22 to where the attorney, Mr. Hinman, assigns the title “Plaintiff’s Exhibit 28” to a site development permit in order to have it entered into evidence. To find the document to which this refers, click the checkbox to the left of the ocrBase folder in the Case Explorer Window and type the search term “site development permit” in the Enter Search Phrase box. Click the Search icon to the right of the search box.

STEP 1

STEP 2

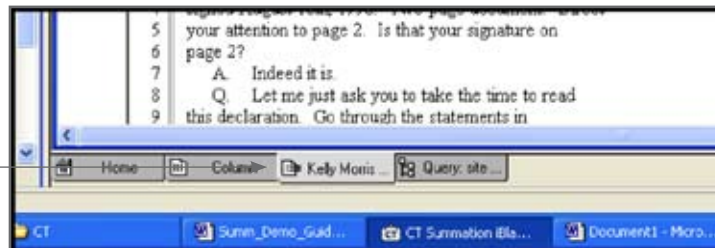


4. The “Search Results” report will contain four hits. Locate the final result for Docid CLM00006, Document Type: Building Permit. At the top left-hand side of the excerpt, click on the “Zoom into Core Database Record” icon.
5. This will bring up the Column View record for Docid CLM00006. Using the tabs at the bottom of the main viewing pane, select the “Kelly Morris...” tab to return to the transcript.

STEP 4

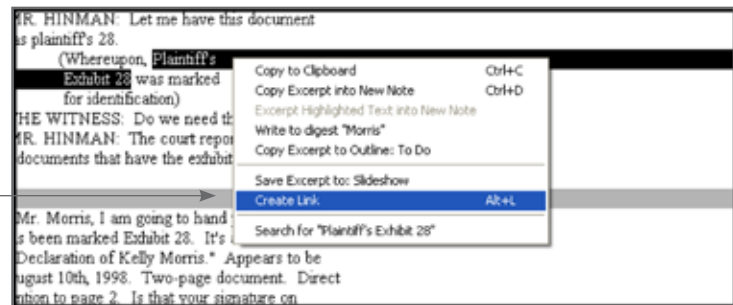


STEP 5

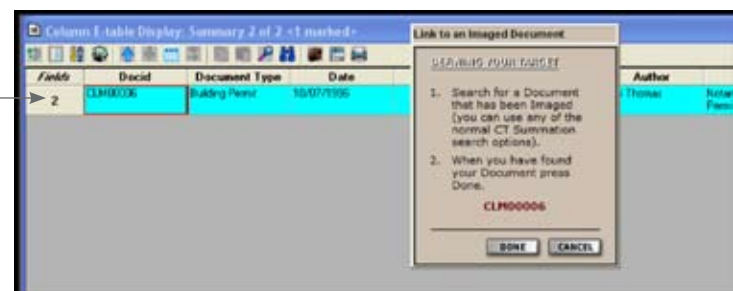


6. On Page 11, click and drag to highlight the words “Plaintiff’s Exhibit 28.” Right-click within the highlighted text and select “Create Link”.
7. The “Link To:” window will appear. Select “Document Image Tag.” The view will automatically shift back to the Column View and the “Link to an Imaged Document” window will appear. Click on the number in the “Field” column to select the entry, then click the “Done” button in the “Link to an Imaged Document” window.

STEP 6

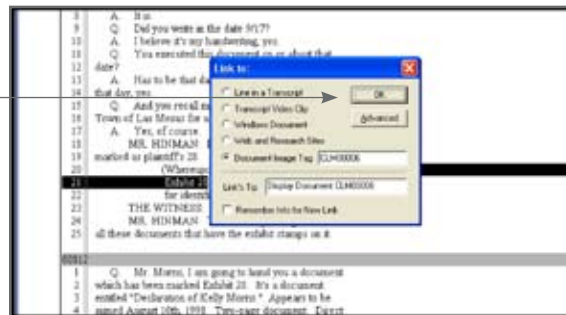


STEP 7



8. The view will automatically shift back to the Transcript View with the “Document Image Tag” field of the “Link to:” window populated with the Docid for the file. Click the “OK” button in the “Link to:” window to complete the linking process.
9. Note that the text is now underlined and highlighted in blue like a hyperlink. Click on the link, and the Image Viewer will appear next to the transcript.

STEP 8



STEP 9



By viewing the transcript and the deposition exhibit side by side, the tasks of adding notes, summarizing testimony in digests, creating highlights, or preparing cross examination outlines can be significantly enhanced.

Realtime Transcriptions

The ability to quickly review testimony moments after it is spoken in a deposition or open court has many advantages. The “Realtime” feature allows users to receive a direct, realtime court reporter feed (Computer-Aided Transcription or “CAT”) directly in iBlaze and immediately view, edit, notate and automatically highlight and tag particular keywords in testimony within seconds of its utterance.

To use the Realtime tools:

1. Open “Realtime” tools by clicking on the “Realtime” icon in the Primary Toolbar.
2. The “Filename for Realtime Transcript” window will appear. In the “Description” field, enter “Cowan Depo” and click the “OK” button.
3. Next, the “Get Connected!” box will appear. Click the “Next” button to continue.
4. In the “Setup Options” screen, select the option “I want to try a demo of Realtime using a simulated transcription”. Click the “Next” button.
5. The simulation will begin running immediately, with transcribed testimony appearing as it would during a realtime court reporter feed.

STEP 1

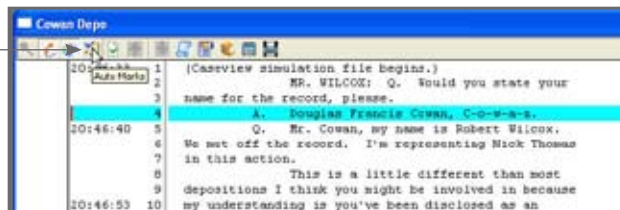


STEP 2

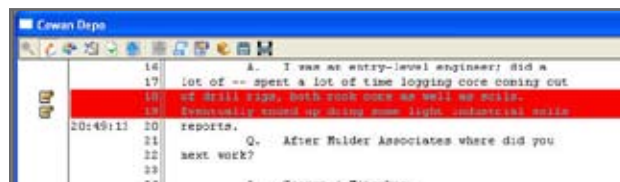
 A screenshot of a Windows-style dialog box titled "File Name for Realtime Transcript". The dialog has a blue title bar with a close button (X) in the top right corner. It contains three text input fields: "File Name:" with the text "DEPO001.RTT", "Description:" with the text "Cowan Depo", and "Initial Page#:" with the text "1". Below these fields is a "Warning:" section with the following text: "This is not a certified original. It's a rough and unscoped draft. There will likely be differences between the text in the rough and final copies. There could be differences in pagination and location of text relative to that in the final." At the bottom of the dialog are two buttons: "OK" and "Cancel".

6. Click on the “Auto Marks” icon in the toolbar of the Realtime window.
7. The “Realtime Automarks” window will appear. Type the word “soils” in the blank box in the lower left-hand corner of the window and click the “OK” button.
8. Notice that as the testimony proceeds, whenever the word “soils” is mentioned, the line in which the word appears is automatically highlighted and marked with the “Note” icon in the left-hand margin.

STEP 6



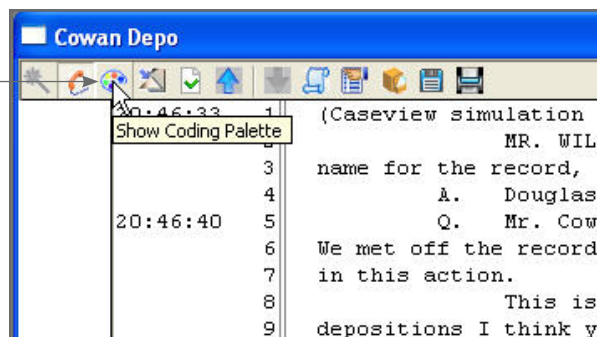
STEP 8



In addition to the “Auto Marks” feature, users can use color-coded highlighting to identify important issues in the testimony:

1. Click the “Show Coding Palette” icon in the Realtime window toolbar:
2. The “Coding Palette” window will appear.
3. Click the Coding Palette’s Issues Tab. All of the existing Issues are displayed, with no highlight colors assigned.
4. Assign a color to a specific issue and make it a Favorite, by first clicking the white color swatch for Negligence. The Color Palette will appear. Click on the Color Palette’s pink color, and the pink color indicates as selected. Click OK, then check the box next to Negligence as a Favorite.
5. Assign a color to four additional issues to and make them Favorites, by repeating Step 2. For example, for Negligent Construction, assign a brown color; for Negligent Design, assign a green color; for Negligent Supervision, assign an aquamarine color; for Professional Negligence, assign a blue color.
6. Click the Favorites Tab. The selected issues are displayed as Favorites with the specified colors.

STEP 1

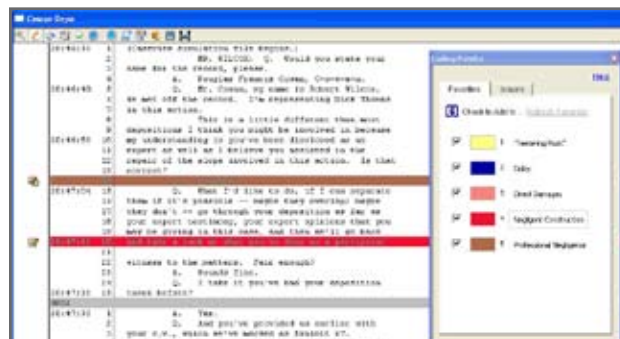


7. Click on a line within the body of the transcript. The line will be highlighted.
8. Next, click “5: Professional Negligence” in the “Coding Palette” window. Then click another line of text in the transcript and click “4: Negligent Construction”. Note that the lines selected are now color-coded by issue and a “Note” icon appears in the left-hand margin next to the highlighted text to allow users to add comments.

STEP 7



STEP 8



Using the color highlighting tool in realtime, users can immediately identify important transcript passages for later review. The color highlights made in realtime are saved in iBlaze for more comprehensive review after the deposition.

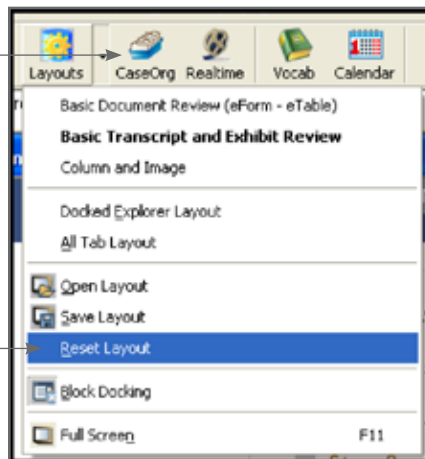
Case Organizer

Using the Case Organizer tool, users can quickly create an area in which to store exhibits and testimony as well as notes and categories.

Follow the steps below to build a witness notebook for Defendant Kelly Morris that contains deposition testimony, key documents and notes.

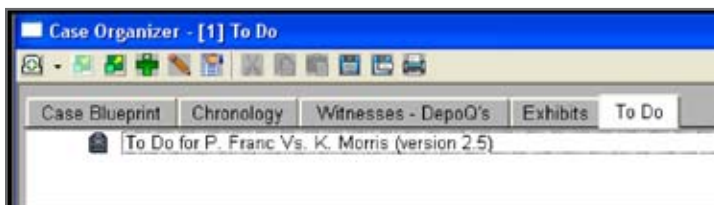
1. Return to the default view by clicking on the arrow to the right of the “Layout” icon in the Primary Toolbar at the top of the screen and select “Reset Layout”.
2. Open the Case Organizer by clicking on the “Case Org” icon in the main toolbar at the top of the screen.
3. Notice the default categories and the toolbar at the top of the Case Organizer. Click the “Case Blueprint” tab.

STEP 2



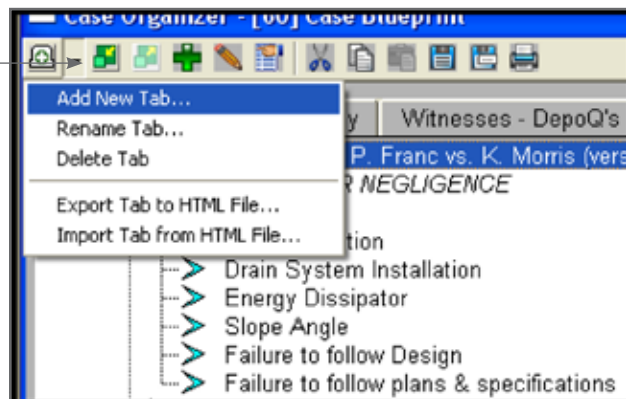
STEP 1

STEP 3



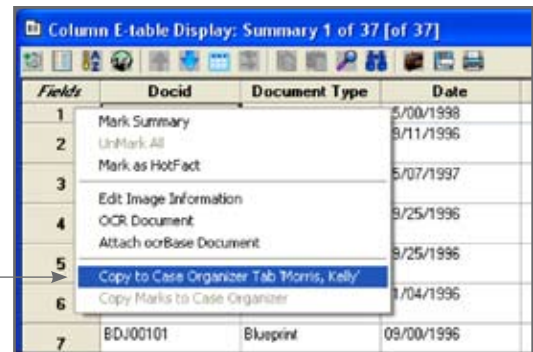
4. Click the “Setup Tabs” icon at the top left-hand side of the toolbar and select “Add New Tab”.
5. The “Enter Name for New Outline’s Tab” window will appear. Type in “Morris, Kelly”. Click the “OK” button to close the window.
6. Click the new “Morris, Kelly” tab, then double-click on the Core Database heading in the Case Explorer to locate files to add to the “Morris, Kelly” notebook.
7. To return all documents received by Mr. Morris, type “recip contains morris” into the Enter Search Term box and click on the Search icon to the right of the search box. The search should return a list of 37 documents in the Column View.
8. Sort the results by Docid by clicking on the Docid field column header and selecting “Sort by Docid”.

STEP 4

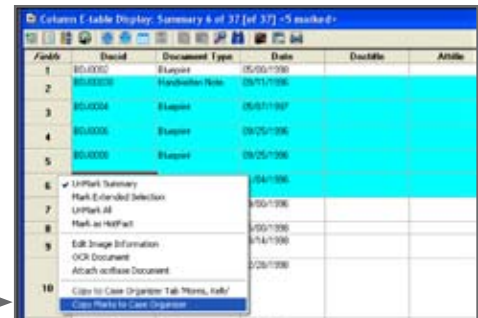


9. Right-click on the first summary in the far left column that indicates the summary number. A menu will appear. Click on the “Copy to Case Organizer Tab ‘Morris, Kelly’”.
10. Right-click on the summary number for the next documents, summaries 2-6. Select “Mark Summary” from the menu for each of the summaries.
11. When done, right-click on the summary number of any “marked” summary and select “Copy Marks to Case Organizer” from the menu to place all of the marked documents into the Case Organizer.

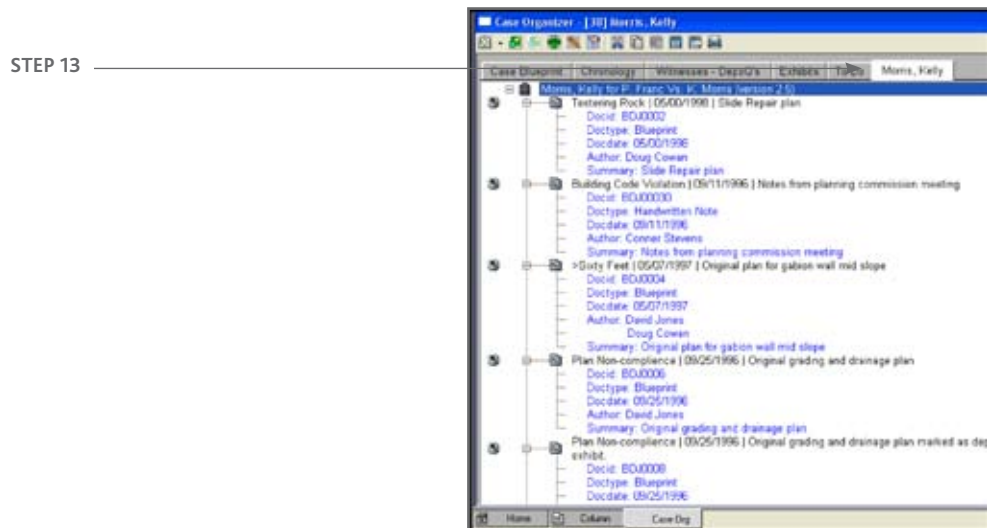
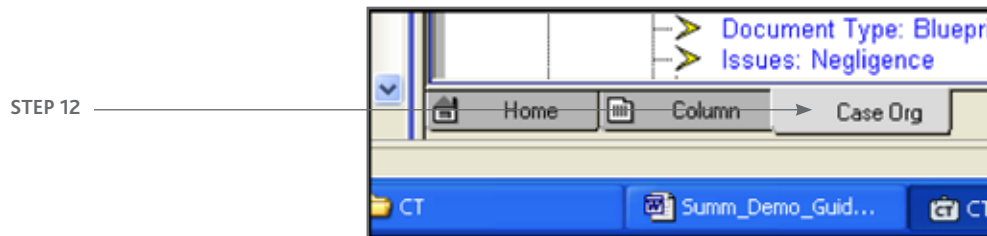
STEP 9



STEP 11



12. View the contents of the Case Organizer by clicking on the “Case Org” tab at the bottom of the screen.
13. To view the files in the “Morris, Kelly” notebook in the Case Organizer, click the “Morris, Kelly” tab near the top of the Case Organizer window.



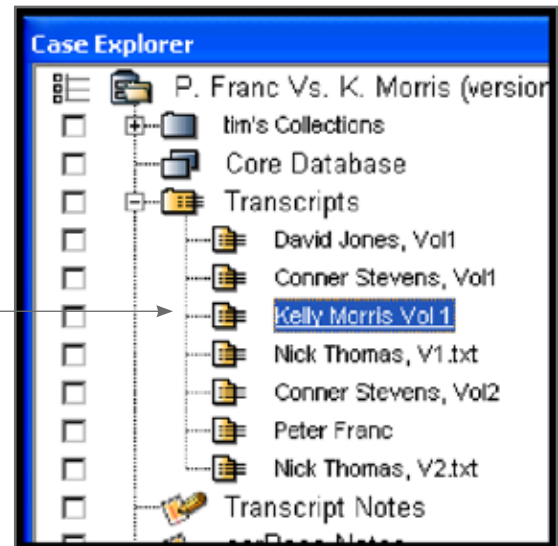
Note that each entry lists the Docid, Document Type, Date, Author and a Summary. Click on arrow button to the left of each file to view an image of the file.



Next, locate some of Kelly Morris' testimony add to the Case Organizer.

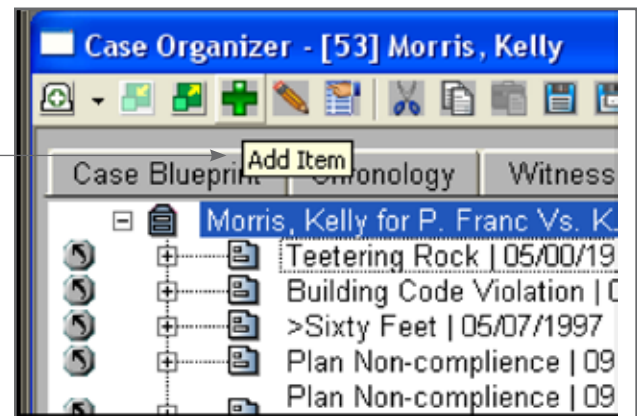
1. Open the Kelly Morris deposition by clicking on the "+" box to the left of the "Transcripts" folder in the Case Explorer pane.
2. Double-click on the "Kelly Morris Vol 1" transcript to open the document.
3. Type in the word "arroyo" in the Enter Search Phrase box above the transcript window and click on the search icon to the right of the search box.

STEP 1

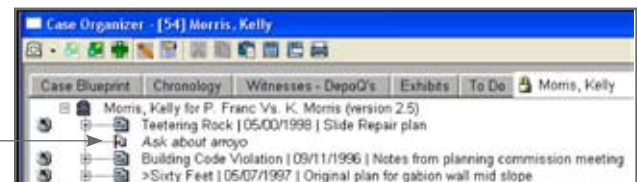


6. From within the Case Organizer, in Morris, Kelly's Tab, insert a comment by clicking on the "Add Item" icon in the toolbar above the Case Organizer.
7. Select "Insert Comment". A new field will appear with a cursor blinking inside. Type in "Ask about arroyo".

STEP 6



STEP 7



eDiscovery

iBlaze 3.0 updates its industry-leading eDiscovery tools by incorporating the latest Oracle Outside In technology, enabling users to view documents in hundreds of different formats directly in iBlaze. From Microsoft Office documents (Word, Excel, PowerPoint) to Adobe .PDFs to a wide range of email platforms, “near-native” viewing allows users to see documents in their original format without the need to have the native applications installed on their computers. For a complete list of supported formats and applications, visit: http://www.oracle.com/technology/products/content-management/oit/ds_OitFiles.pdf.

To use the Near-Native Viewer:

1. In the Case Explorer, click on the “+” box next to the “eDocs & Email” to expand the category. Double click on the “eMail” subcategory to open all emails in the Column View window. A set of six emails will appear in the Column View along with the eDocs Viewer set to “View as Text” mode.
2. Modify the Column View to show the metadata fields by clicking on the “Fields” button in the top left-hand corner of the Column View. Add the following fields to the Column View by clicking and dragging the field labels into the column header area to the right of the Docid field: Body, Datercvd, Datesent, Folderid, From, Msgid, Storeid, Subject, Timercvd, Timesent, To and Subject.

The information for each of these fields is drawn from the metadata of the original email. For example, the “Datercvd” field displays the date an email was received, the “Body” field contains the full text of the email, the “Subject” field contains the subject line of the original email, etc. As with all Column View fields in iBlaze, users can easily sort, edit and organize summaries.

The Federal Rules of Civil Procedure were amended on December 1, 2006, opening the floodgates of electronic discovery to accommodate the admission of email, including any attachments an email might have. Due to the sheer volume of information represented by such evidence, the ability to quickly and effectively search and organize eDiscovery evidence can be critical to the success of a case and can save hours, if not months, of costly and laborious review. The eDiscovery tools in iBlaze allow attorneys to view eDiscovery evidence including e-mail, email attachments and metadata.

To view other kinds of eDocs in the case:

1. Double-click on the “eDocs” subcategory under “eDocs & eMail”. Again, the eDocs View of the document will appear next to the Column View.
2. Docid EDC000001 is a Microsoft Excel file. To view it in near native format, click on the “Preview in Near Native Mode” icon in the toolbar in the eDocs View.

STEP 2



Viewing Email Attachments

To view eMail attachments:

1. Double-click on the “eMail Attachments” subcategory under “eDocs & eMail”. Again, the eDocs View of the document will appear next to the Column View.
2. Toggle between the text and near native views to see the documents in Microsoft Word or plain text format. To view other eDocs in the set, click the “Next eDoc” icon—the blue arrow pointing to the right—at the top of the eDocs View.

Tip: In the “View as Text” window, users can view the properties of a document by scrolling to the bottom of the last page of the document:

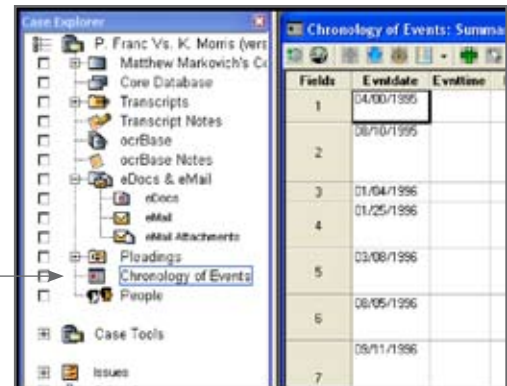
Document Properties	
Index:	0
Author:	charlie
Template:	Form2
Last saved by:	charlie
Revisions:	2
Application:	Microsoft Word 9.0
Total editing time:	00:15:00
Created:	2001/07/13 16:50:00
Last saved:	2001/07/13 23:00:00
Company:	Summation Legal Technologies, Inc.

Chronology of Events

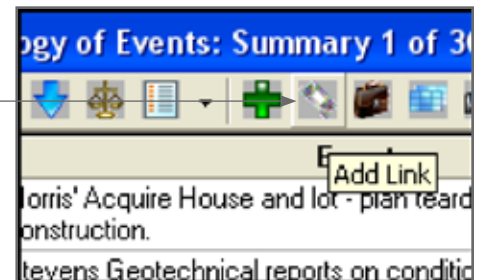
The “Chronology of Events” tool in iBlaze allows users to organize the events in a case into a simple table that can reflect the start and end time of an event and the date range associated with an event. Users can also add notes and link documents and testimony to events.

1. Open the “Chronology of Events” table by double-clicking on the “Chronology of Events” heading in the Case Explorer window.
2. As with all information in the Column View format, users can add, edit and organize fields, including the date range of an event, the specific time an event occurred and whether an event is disputed. Other fields allow users to add comments and a full summary of an event.
3. By clicking the “Add Link” icon in the toolbar, users can add a link to any document in the case or a page and line from the text of a transcript.

STEP 1



STEP 3



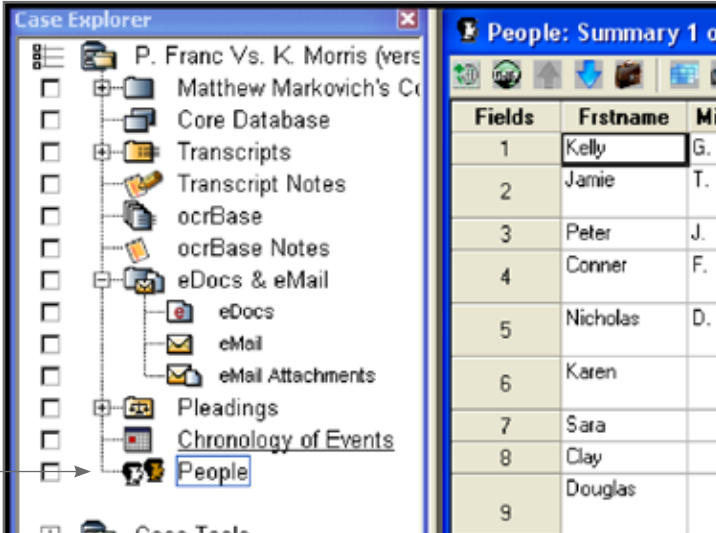
People or Cast of Characters

To keep track of all the individuals in a case, iBlaze offers a “People” table that allows users to create a list of everyone involved in the case

1. To open the People table, double-click on the “People” heading in the Case Explorer window.

As with other Column View tables, users can add, edit and organize fields any way they chose. Basic information includes the names of individuals, the organization to which they belong and their role and title. Users can insert additional comments and note whether or not person is a witness in the case.

STEP 1



The screenshot shows the 'Case Explorer' window on the left and the 'People: Summary 1 of 9' table on the right. The 'People' table is selected in the left pane, and an arrow labeled 'STEP 1' points to it. The table on the right has the following data:

Fields	Frstname	Mi
1	Kelly	G.
2	Jamie	T.
3	Peter	J.
4	Conner	F.
5	Nicholas	D.
6	Karen	
7	Sara	
8	Clay	
9	Douglas	

Exporting Summaries

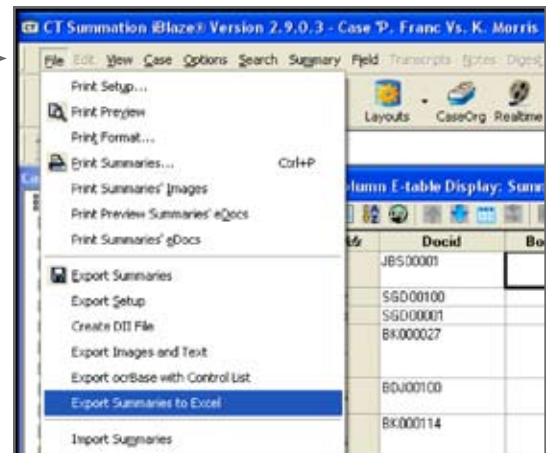
Feature requires that Microsoft Excel is installed on user's computer.

Users can quickly export any table of summaries from the Column View into an Excel document; e.g., a report of trial exhibits, a privilege log, a list of produced documents, etc.:

1. Open the Column View in the case by double-clicking on the Core Database category in the Case Explorer.
2. From the top menu bar, click on the “File” heading and select “Export Summaries to Excel” from the drop-down menu.
3. A dialog box will appear asking “Do you want to send the displayed data form the core database into excel?” Click the “Yes” button.
4. Assuming Microsoft Excel is loaded on your computer, Excel will open and the document summaries, including the fields listed in the Column View, will be sent to Excel.

From here the user can then use the spreadsheet capabilities of Excel to manipulate the list for any of the above-stated reasons.

STEP 2 →



Conclusion

As this demonstration guide shows, CT Summation iBlaze is much more than a simple database or evidence repository. iBlaze provides users with powerful search capability, and its broad range of tools allows legal professional to more effectively manage information and specifically tailor search results to their needs. The demonstration guide has shown only a fraction of the features available in iBlaze. Additional features include:

- Annotation tools modeled after hard-copy post-it notes
- One-click hot-fact flagging and issue/date coding
- One-click segregation of important search results
- Rapid-fire digesting and evidence-linking tools

Transcripts and associated exhibits, document abstracts and images, email and electronic evidence can be quickly searched, analyzed and exported to allow multiple users to examine key evidence wherever they are. From the office to the boardroom, in court or in flight, iBlaze puts the world's most powerful case management system in your hands.

CT Summation iBlaze remains the industry leader in case management software because it consistently evolves to meet the needs of today's legal professionals. iBlaze allows the masses of information from all sources of a case to be sorted, presented and produced in concise, intuitive and useful formats specifically designed by legal professionals to help fellow legal professionals win cases.

Appendix: Integrated Architecture

For the IT professional, iBlaze has developed a system to deliver “search, organize and orchestrate” functionality in an integrated architecture using desktop-based, browser-based and ASP-hosted tools. In addition to optimizing existing systems, its integrated architecture reduces a firm’s total cost of ownership.

CT Summation iBlaze provides a single, central repository of core case information that can be accessed in a number of different configurations or combinations of configurations. It may be used as:

- An economical, concurrent-user LAN workstation;
- A Web server-mediated, browser-exclusive application;
- A LAN, Web-hosted and transportable data access system; e.g. when a network or Internet connection is unavailable. iBlaze also offers:
- Objective, independent, third-party hosting of common evidentiary information for use in complex, multi-party litigation;
- The industry’s most cost-effective combination of solutions that can be tailored to end-user needs and location.

In addition, peripheral document and transcript repositories, such as expert witness transcript and document archives, can be searched concurrently with the core case information via a simple, unified interface. Users may:

- Provide remote or local access to a peripheral database;
- Access information remotely from either the central repository or a peripheral repository that can be “Briefcased” -- downloaded for later, offline litigation support if no network or Internet connection is available;
- Easily promote or merge data with the central core case repository. iBlaze Browser Briefcases serve as a simple, non-proprietary means to share information with disparate systems using XML, HTML, PDF, Multipage TIFF, PST and native file formats for EDD.

Multiple system database engine alternatives for both core case document repository and peripheral repository engines include:

- CT Summation’s Saturn/Blaze Engine
- Microsoft SQL Server 2000
- OLEDB-compliant database engines.

For more information, white-papers and knowledgebase resources for the IT/MIS professional, visit <http://www.ctsummation.com>.

To find out how CT Summation can help you with your next case or to schedule a demonstration, call Inside Sales at 800 735 7866, or email sales@ctsummation.com



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