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B

Briefcasing

With AD Summation iBlaze you can create Briefcases, or record subsets (i.e. all records and images to be used for a particular witness in an up coming deposition) of your main document population. Using Briefcases, Remote Databases record subsets and related images can be stored locally. This was helpful for situations when they did not have internet access (i.e. deposition) but would still need to have access to the information. Briefcases can be created from local or remote databases and can be edited by the user just as the Core Database can.

Browser Briefcases

You can export Briefcased data and images to an HTML-friendly format. These Browser Briefcases are accessible by anyone using an Internet browser such as Microsoft's Internet Explorer or Netscape's Navigator. Images can either be saved as multi-page TIFFs or as PDF files. The Browser Briefcase is a great feature for providing Experts with information.

C

Case Organizer

AD Summation's Case Organizer gives you the ability to place case data (i.e. transcript testimony, document records, images, etc.) and your own comments into an outline-style staging area. You can use the Case Organizer to craft a case blueprint, a deposition roadmap and a chronology. Up to 100 different outlines can be created to help develop your strategy over the course of a litigation.

Companion Databases

AD Summation LG Gold and iBlaze allow you to have multiple databases in a single case in addition to the Core Database. These databases are known as Companion Databases and reside within the firm either on the network or local to the user.

CopyCase

CopyCase gives you the ability to copy an entire case, or portions of a case, to another network location, a laptop, another computer or to removable media. CopyCase will also allow you to merge cases back together.

E

eDocs

eDocs are evidentiary electronic documents (such as Microsoft Word documents). When you load them into a case, a document database record is created for each eDocument. Special fields on your e-form store information regarding your eDocs such as the document title; date created, and document type. You can view eDocs as plain text or in their original format using the program in which they were created (i.e. Microsoft Word) as long as the necessary program is installed on your system. eDocs are searchable and are automatically Blazed (indexed) each time you load them.

Electronic Evidence

In today's information era, the importance of electronic evidence in a litigation cannot be understated. As clients documents are increasingly generated and stored in electronic format, firms, clients and the courts are fast recognizing the need to exchange electronic information as part of standard discovery procedures.

Few question the evidential value of the type of information electronic evidence such as e-mail discussions can reveal. However, the process of how best to manage and winnow the very large portions of electronic data provided by clients to firms is usually the most difficult part of the process.

AD Summation CaseVault's revolutionary and flexible way of handling either native or image format electronic evidence provides a cost efficient means for teams to winnow relevant data and continue to manage only that which is relevant. The expert staff at AD Summation CaseVAult will guide you through each step of the process and advise you as to the most cost effective means of managing your electronic evidence.

eMail

When Email is load into a case a new document database record is created for each Email. If the Email has attachments (electronic files), a document database record is created for each attachment as is done with eDocs (described above). You can then add your own notes to these records. eMail attachments are searchable and are automatically Blazed (indexed) each time you load them. You can view eMail attachments as plain text or in their original format using the program in which they were created (i.e. Microsoft Word) as long as the necessary program is installed on your system.

I

Image Viewer

The image viewer allows you to view the document image associated with a database record. While viewing the image you can annotate on the image to redact portions of the image, highlight, annotate, etc.

Integrated Search

An integrated search allows you to search more than one data type. For example, you can search your document database, key transcripts and OCR from your document images for a key word or term. The results are provided in one organized report.

N

Native Format

AD Summation's unique solutions for managing eDiscovery gives you an opportunity to winnow masses of electronic documents and other content down to that which has at least some threshold significance or possible relevance to the case. This way you won't bear the costs for converting irrelevant or non-responsive documents to .TIFF/.PDF format. The AD Summation CaseVault secure online repository allows Case Teams to host e-mail messages, their attachments and other types of Windows-based electronic documents (collectively 'edocuments') in a centralized location for search and retrieval purposes. Teams can expeditiously assign categories such as relevant, irrelevant, privileged and responsive to search results, while reviewing the documents in a native format viewer. This means users can see documents in the exact format they were created. For example, rather than trying to view an Microsoft Excel spreadsheet as a .PDF file, users can view the spreadsheet in Microsoft Excel – brilliant! No more lost or hidden cells! Unveil from behind the scenes (or at least become aware of) metadata, formulae and annotations!

In addition, AD Summation's unique native format review enables users to winnow out the relevant documents and only petrify documents identified for production. This ensures firms save large amounts of money by not paying for irrelevant documents to be petrified. AD Summation CaseVault's low cost petrification tool will ensure that even when documents do need to be petrified, firms will only be charged a small fee. The ability to access and review documents in their native format, rather than being forced to review .TIFF or .PDF files means no information within the document is lost. Microsoft Excel spreadsheets can be viewed so that users can tab from sheet to sheet and cell to cell.

O

ocrBase

Optical Character Recognition (OCR) is the process which takes an image (electronic photocopy) and converts it into text giving you the ability to search within a document. Because OCR'd documents commonly contain misinterpreted characters (i.e., an e instead of an a), the use of Summation's ocrBase provides a fuzzy search option that is well-suited for OCR'd documents. Fuzzy searches give you the ability to search for near-matches to your search term(s). Using Summation's image viewer in conjunction with the ocrBase, you can view your documents in their original form (the image) and conduct full-text searches (OCR). This combination helps to reduce labor intensive document coding. Summation's iBlaze edition gives you the ability to create OCR documents from images within AD Summation products.

P

Paper Paradigm

(Image Format) In addition to hosting native format eDiscovery, AD Summation also manages electronic discovery processed pursuant to the scanned paper paradigm with aplomb (conversion to .TIFF images or .PDF with text extraction for searching). This class is geared toward traditional paper discovery service bureaus that scan paper documents and use Optical Character Recognition (OCR) technology on the resulting imaged documents. Also, in this model, e-mail messages and electronic documents (received in either in paper or native, electronic format) are converted or petrified by a service bureau to .TIFF or .PDF image formats, and the text and metadata are extracted. When loaded into AD Summation products, the image information is loaded into the Image table, the full-text is loaded into the full-text base, and

generated metadata is loaded into the Document Summary Table. Any data processed by a bureau in this manner and provided to AD Summation CaseVault must comply with the Class I DII file, in order for CaseVault to maintain the parent/child relationships of compound documents.

Parent/Child Relationship of E-mail Messages & Attachments

An e-mail message or other electronic file that has a file attached is referred to as a compound document. An email message that has an attachment is called the parent document and the attachment is called the child document. It is important to preserve the parent/child relationship of electronic data, which can be reflected in CaseVault document database summaries.

In AD Summation CaseVault, the separate database summaries that are created for an e-mail message and its attachment(s) constitute a complete compound document. For example, when a user views an e-mail message in Microsoft Outlook or Lotus Notes, the attachments are an essential part of that e-mail message. In AD Summation CaseVault, although a compound document is separated into several database summaries – one for each member that is part of the compound document – the entire compound document is considered to be one unit.

Pleadings

Pleadings are non-evidentiary documents, or the law firm's own documents. You can have multiple sets of Pleadings documents loaded into your case. You provide a descriptive name for each set. Pleadings are searchable and are automatically Blazed (indexed) each time you load them. You can view Pleadings as plain text or in their native format (using Microsoft Word, for example).

Production Tools

For discovery purposes images can be renumbered for individual productions. Rather than have the original document identification number appear on the image, a "production number" appears instead. This may be the case when irrelevant documents have been removed from the production set. Without renumbering, gaps would appear in the numbers. This is frequently the situation when a core set of documents is produced in multiple cases. Summation's production tools now make that task easy through the use of the Production Tools Wizard. Summation can track the production ID for every production created.

R

Realtime

A Realtime session is one in which the witness testimony is transcribed by the court reporter, and the court reporter's transcription appears on connected laptop computers at nearly the same moment. This allows attorneys to mark key testimony during the deposition and have the testimony immediately available after the deposition without having to wait.

Remote Databases

AD Summation iBlaze allows you to access Remote Databases which resides outside of your local or network system. The Remote Databases are accessed using a modem or high-speed Internet connection. A Remote Database requires an Internet connection because the database is maintained at a remote location (i.e. a repository, your client's offices, another law firm's system).

S

Slideshow

The Slideshow feature in Summation allows you to create a Microsoft PowerPoint-like slide of key testimony from a transcript. The slide is then stored as a picture in a .JPEG file. The

Slideshow folder can store a combination of testimony slides and images which can be set up and then presented for hearings, depositions and/or trial. Structured Database A structured database is a repository in which pertinent information relating to documents, people or events in a case is input. In a Document Database information such as: issues in documents that relate to the case, authors of documents, recipients of documents, names mentioned, dates, and Bates numbers are included in the record for each document. Other databases may consist of Expert information or the chronology of your case. Records can be searched, sorted, viewed and printed.

T

Transcript

A written record of legal proceedings taken by a court reporter or stenographer. The transcript is typically provided by the reporter as an ASCII file on a floppy disk or via email.

Transcript Manager

Software program used by attorneys and their staff to load, summarize, search, annotate and produce reports of key testimony and/or attorney note contents.

24x7 Processing Services

For firms who do not have the tools in-house, or a vendor to assist with processing their eDiscovery, or for some other reason, such as confidentiality or convenience, AD Summation CaseVault can provide processing services to extract meta data (such as FROM, TO, SUBJECT, TIME SENT, TIME RECEIVED, READ, BC, CC) and prepare data for import into CaseVault.

CaseVault can extract PST or NSF files and can offer either native format or scanned paper paradigm processing. AD Summation CaseVault can also load common format electronic files such as .MS files, .PDF and .MSG files. When .PST, .NSF or common files are loaded into CaseVault and any extracted metadata together with the entire text of the document is indexed for search and retrieval purposes.

Any attachments to emails will be numbered sequentially after the parent email and at all stages the parent/child relationship is retained. When in an attachment, the user can quickly switch screens to view the host e-mail, or when in an e-mail, can quickly switch screens to view an attachment.

AD Summation CaseVault does not provide onsite data collection, file restoration or forensic recovery services.