



Summation Scripting Information

(as of July 20, 2006)

Scripting Discussion Group

<http://groups.msn.com/SummationScripting/>

This group is not very active. It is recommended that if you would like to join the group, you should add something in the comment field of the "application" to indicate you are a real user in order to avoid having your message filtered out as spam.

Available Summation and Related Scripts

For the most current versions of scripts developed by CTSummation, contact Summation's Scripting Department at scripting@summation.com. (Please take note of Summation's disclaimer at the beginning of each of its scripts.) For scripts developed by VeBridge, contact pengel@vebridge.com or visit the website www.vebridge.com. For scripts developed by Emanuel (Nino) Borges, go to his website at <http://ninosystems.com>. Scripts listed here that are developed by VeBridge are on a fee-basis. Scripts listed here developed by Summation and by Nino Borges are available at no charge. Other miscellaneous utilities and scripts listed here may also be useful. Check the referenced websites for pricing information.

Scripts are also available to enable add-in functionality for such programs as TrialDirector, Sanction, CaseMap and IPRO, among others. See the add-in program's website for more information.

Please Note: By listing a script or utility in this document, Evans Training & Consulting is neither recommending nor warranting the functionality of the listed script. This document is intended for informational purposes only. You should perform your own testing and due diligence, and always maintain current backups of your data before running any script.

Script Name	Source	Purpose	Comments
Attach marked document images to an email	VeBridge (Paul Engel)	This script allows the user to mark several items in their document database and enclose the images in an email. The script checks to make sure there is an image in the ImgInfo table, bundles all the pages into a single multi-page tiff, names the file the same thing as the docID, opens a new email and attaches the tiff file.	
Attach checked Transcripts to an email	VeBridge (Paul Engel)	This script allows the user to check one or more Transcripts in their Case Explorer and enclose the images in an email. The script encloses the transcripts in an Outlook email which the script creates (requires the user has Outlook on their client, and sets the attachment description as the same thing as the Transcript Description. (This one is under development for a client.)	

Script Name	Source	Purpose	Comments
Automated Transcript Exhibit Links	VeBridge (Paul Engel)	This script allows the user to check multiple transcripts on their Case Explorer and automatically add links to exhibits based on multiple exhibit descriptions that could be in the transcripts. (i.e. Exhibit 53, Exhibit No. 53, Exhibit Number 53, simply "53".) When searching for the exhibit number alone, as in "Why don't we refer back to 53.", the script prompts the user to make sure that the "53" is an exhibit reference instead of an unrelated term. This eliminates hours of paralegal work summarizing transcripts and preparing them for attorney review. See also Summation's free script: Transcript Links	Developed in conjunction with Evans Training & Consulting. Primary difference between this script and Summation's script is that this script gives the user the opportunity to apply the link to disparate references to the same exhibit (e.g. Ex. 1, Exh. 1, Exhibit 1, etc.)
Auto-populate Enddoc# and Pageamt fields	VeBridge (Paul Engel)	This script allows a firm to have their service bureau only code the beginning document number during scanning. The script automatically calculates the ending number and number of pages and populates the appropriate fields in the Core database. It provides an audit report that details any overlapping numbers and gaps so that they could be manually corrected. This can save a firm tens of thousands of dollars in coding costs. The script can be made to focus on Begdoc#/Enddoc# or bates number fields and can be run on new document collections or existing databases to inspect the numbering sequence for problems.	
BatesFill	Summation Scripting Dept.	Calculates and fills BatesRng by adding PgCount to DocId	
Change Carriage Return/Line Feeds to Carets and visa versa in Multi-Entry fields	VeBridge (Paul Engel)	This script deals w/ the need to both import and export into and out-of Summation. Multi-Entry fields use carriage returns and line feeds w/in the field to delimit the list of data values. If you export multi-entry fields from Summation with the expectation of importing the data into other packages, like Excel or Access, you will not have the right number of fields in each line and will have records broken up across multiple lines in your text output. Running the first script replaces the carriage return/line feed with a delimiter of your choosing prior to export. After importing data into Summation with multi-entry field data delimited, the other script is run to replace the delimiters with carriage return/line feeds. The delimiter can be set to any ASCII character desired.	
CheckAllPermissions	Summation Scripting Dept.	Generates a report to indicate what permissions current user has on the general level	
Convert Alpha Numeric DocID to Zero-Filled Numeric	VeBridge (Paul Engel)	This script converts the value in the default DocID field to zero-filled numeric. It removed the alpha component. It will make the change in the core database and the imginfo table.	

Script Name	Source	Purpose	Comments
Convert a Browser Briefcase to loadable files (fielded text and DII load file)	Summation	The script is designed to produce two types of files through the processing of a Summation Browser Briefcase ("BBC"). A .txt for loading the coded data into Summation as records, and a .dii for loading the associated images, OCR and eDocs.	
Copy E-Docs to Directory	VeBridge (Paul Engel)	This script extracts the edocs and attachments from the currently found set and copies them to a directory in the Program directory.	
Copy Marked Images to Directory	VeBridge (Paul Engel)	This script allows the user to mark one or more database records and have the associated images copied to a directory. The script 1) checks to see if an image exists, 2) merges all the pages of the image into a single, multi-page Tiff file, 3) creates a new directory, copies the tiff file(s) named after the docID(s). The user has the option to include annotations. (This feature is only supported under releases after and including 2.5.)	
Copy Transcript Shortcuts to Transcript Groups	VeBridge (Paul Engel)	This script allows the user to check multiple transcripts, right-click on a Transcript Group folder and have the shortcuts for the checked transcripts created in that folder. This eliminates the tedious single drag-and-drop approach that is required today.	
CopyImagesAndTxt	Summation Scripting Dept.	Copies a subset of images out of a Summation case, preserving their original file names (or using ProdNo.). Also looks for text files that have the same name as the image file and are located in the same directory as the image.	
DII From Multi-Page Images	VeBridge (Paul Engel)	Writes a DII file from a directory structure with the DOCID as the name of the Multi-Page Tiff file.	
DII From Single-Page images	VeBridge (Paul Engel)	This script is designed to operate with single-page images within directories whose names are the DocID. The script creates a DII file with entries for each Directory under the root.	
DiiFromDisplayedRows	Summation Scripting Dept.	Create a DII from an existing summation database. Option to extract the OCR text at that time.	
DisplayCasesInformation	Summation Scripting Dept.	Runs through the .ci files in selected cases directory and pulls out the the 'Case Customize' information for each case. This information is written to a text file and displayed.	

Script Name	Source	Purpose	Comments
Document Reunitization Script	VeBridge (Paul Engel)	The purpose of the Re-Unitization Dashboard script is to help the user change document breaks for incorrectly unitized documents. Summation handles images on a document by document basis (rather than a page-by-page basis, as many image viewing programs do). Sometimes, documents may be incorrectly combined so that multiple documents are associated with a single record in Summation. This is generally considered a poor practice. In Summation, each document stands on its own. It is important, however, to correlate related documents. This script provides a user-friendly HTML dashboard that allows a user to designate new documents, parents, children and documents that must be combined. It produces a DII file that will update the database AND update the OCRBase, assuming the original txt files have not been deleted. It also provides a button that allows the user to delete any orphan records (due to combined documents). Other features: Validation prior to producing new DII and on-the-fly validation to ensure the user does not create illogical groupings, like a parent designation without children.	Prepared in conjunction with Evans Training & Consulting
Document Summary Consolidator	VeBridge (Paul Engel)	This script was written for a firm that had allowed coders to enter document summaries on a page, rather than document, basis. When the work was completed, they wanted to consolidate all of the page records into the document record and delete the obsoleted page records. The script handles note, multi-entry and date fields differently in order to properly preserve the detailed records without violating the data type rules and with good visual clues to indicate which data was associated with different pages. Upon completion of each consolidation, the script simply marks the page records complete so a search can be performed after QA and the page records deleted.	
Edocs Batch Print	Summation Scripting Dept.	Print Text view of edocs in batches. Optional Docid footer on printout, 10/03 = most recent version.	
E-Docs Print Script	VeBridge (Paul Engel)	This process combines multiple scripts to accomplish a tedious task. The first script allows a group of marked or found records to be marked for printing. The second script collects the emails and edocs and creates a text file, with proper "page of pages" footer, for printing. This script overcomes the Internet Explorer "feature" that plagues the Summation script intended to provide this functionality.	Prepared in conjunction with Evans Training & Consulting

Script Name	Source	Purpose	Comments
FixPageCount	Summation Scripting Dept.	Earlier versions of Summation sometimes had a problem with multi-page tifs, where the PAGES field in the ImgInfo table always held a value of '1'. This script queries the actual image files and updates the ImgInfo table's PAGES field accordingly.	
Generic Export	VeBridge (Paul Engel)	This script exports all the columns currently displayed for all records in the current found set. It replaces carriage return/line feeds with semicolons and replaces double quotes with carets. This allows them to be properly imported by other programs. The characters can then be changed back in the program into which the data is imported. (This is similar to the replacement scripts described elsewhere, but is designed to work with other fields, like Summary or Attorney Notes, which may contain carriage returns and line feeds.)	
Image Info Table To DII (ImgInfoToDII)	Emanuel Borges (aka Nino)	A free utility to convert an imginfo table export into a loadable Dii file	
Images_Archiver	Emanuel Borges (aka Nino)	A free utility that helps you archive a Summation IMAGES directory	
Jump to Image Page by Bates Number	VeBridge (Paul Engel)	This script allows a user to enter the bates number of a document and be taken to that page in a document. The script runs the search to find the appropriate document, opens the document in the image view and jumps to the appropriate page. The script assumes that the bates numbers are being used as the BegDoc#/DocID. It does NOT adjust for suffixed pages, so there may need to be some adjustment once the "logical" page is presented.	
LFPTOXREF 1.0	www.tryingbuying.com	Extracts Bates ranges from IPRO LFP load files. A very convenient utility for litigation support professionals who work with litigation databases. It quickly creates a file of beginning/ending Bates number pairs from an LFP. The extracted Bates number pairs can then be imported into a database such as Concordance or Summation.	IPRO-related utility

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Mass Sort Script	VeBridge (Paul Engel)	This script was written for a client who had to perform hundreds of "AND" and "OR" searches on their database in accordance with a request for production. Once they conducted a search, they had to enter the search phrase in a field to record the positive hit on each record, then begin the next search. Since they were updating the database after each search, the searches became impossibly slow. (The Blaze database was not being updated.) This script uses a text file with a list of valid search strings to conduct all of the searches in a batch mode. Once all of the searches are complete, the script runs through the database and populates the list of sort phrases in a multi-entry field. Conducting thousands of searches on a large database can be completed in a highly compressed time with little human intervention.	
MergeOCR 2.01	www.tryingbuying.com	MERGEOCR offers an easy, repeatable, affordable utility that assembles multipage OCR text files from their single-page components. It uses an IPRO load file as a template to guide the file consolidation. MERGEOCR effectively captures best-practices with regard to OCR text file manipulation, making this otherwise tedious task simple and its outcome consistent, regardless of operator skill level.	
Missing Image Detector	VeBridge (Paul Engel)	This script checks all the records in the Core database and determines if it has a matching image record in the ImgInfo table. A report is generated. It also checks the page count field against the actual number of pages reported in the ImgInfo table and reports on variances. These variances can, optionally, be corrected.	
Multientry Sort	VeBridge (Paul Engel)	This Multientry Sort script automated sorts the contents of displayed multi-entry fields. The user can run the script on the results of a document summary search. It sorts the values in the multientry fields being displayed in Column View. It optionally deletes any duplicate values in any field.	
Notes2Outlook 1.051	www.tryingbuying.com	Notes2Outlook is a client based tool that leverages existing Lotus Notes and Outlook client libraries to offer a simple Notes to Outlook email migration capability.	Summation's eDiscovery Console will accept Lotus Notes files, but this utility may help overcome some issues that some have reported with the eDiscovery Console.

Script Name	Source	Purpose	Comments
OCR Search from DB Results	VeBridge (Paul Engel)	This script builds an HTML file with search results from OCR documents associated with a found set of Core database records. The HTML report provides a summary of the total number of database records in the original found set, the number of total OCR hits, the DB search phrase and the OCR search phrase. Each hit shows DocID, page number/line no. of hit and 10 line excerpt.	
OCRControlListFromBC	Summation Scripting Dept.	Exports OCR text, if it exists, and a matching control list from a briefcase that has been loaded into the Case Explorer window. User will need to browse to the briefcase folder's physical location within the case directory structure. OCR can then be loaded into the coredb ocrBase so that it is searchable.	
OCRExportWithControlList	Summation Scripting Dept.	Export OCR at document level and create associated control list	
Orphan Image Deleter	VeBridge (Paul Engel)	This script checks all the records in the ImgInfo table and deletes those that do not have a related record in the core database. It has the option of either deleting the orphans or simply providing a report with a list of orphans. It also checks the page count field against the actual number of pages reported in the ImgInfo table and reports on variances. These variances can, optionally, be corrected.	
PgCntFill	Summation Scripting Dept.	Tries to fill the PGCOUNT/number of pages field by calculating difference between beginning and ending number values.	Available in the Custom Tools section of the Case Explorer tree
Populate Lookup Table On-The-Fly	VeBridge (Paul Engel)	This was a special script written for a client that needed to fill in an objections field in the database with the bates numbers of the specific pages to which there were objections. They did not want the bates numbers typed for fear of data entry errors. By creating a look-up table "on-the-fly" based on the beginning and ending document IDs, they could have pages to which there were objections selected from the look-up table. This script is run from a context menu when the user is ready to edit the field. It determines the document ID or Bates numbers from the appropriate fields (based on the case's defaults) and automatically populates the look-up table with a complete list of "page" numbers after clearing the contents from the previous record. The script reports when the number of pages in the image differ from the calculation based on the document ID range. (This is usually due to suffixed bates.) These records must be manually coded.	

Script Name	Source	Purpose	Comments
Production DII with Images to Directory	VeBridge (Paul Engel)	This script was written for a client that was required to produce from Summation in a format that could be imported into opposition's version of Summation. A production set was not acceptable. The script will take a found or marked set of records containing images and create a production set. The production set will include an index file derived from the columns in the current column view, a DII file that utilizes iteration, and copy the images from their current location to a unique directory under the case directory path. If the user does not wish to provide the coding information, they can delete the single file in which this information is stored, since it is NOT provided in the DII file.	
Reunitize	Summation Scripting Dept.	Allows user to correct document break problems. Right-click on an image and split it on that page. A new record is generated for new section of images.	
SpellCheck	Summation Scripting Dept.	Use the spellchecker function of Microsoft Word to search your coded records for misspellings	
Summation Extension	Emanuel Borges (aka Nino)	A free image extraction utility for Summation	
SummationToExcel	Summation Scripting Dept.	Writes the topmost SWDBGrid or core db view data into the worksheet of an open Excel spreadsheet	
Tally Multiple Fields	VeBridge (Paul Engel)	This script allows the user to select multiple fields on which to run a tally. The script was originally designed to provide a tally of all the Name fields for a case, but has been expanded to support all fields. The report can be sorted by the field value or the number of hits. It can even provide a report with separate two listings, one sorted by value and the other by the number of hits.	Prepared in conjunction with Evans Training & Consulting
Transcript Links	Summation Scripting Dept.	Create transcript links on a batch basis. See also VeBridge script: Automated Transcript Exhibit Links	Available in the Custom Tools section of the Case Explorer tree. NOT a standalone script.
Unattended Daily Backup and Maintenance	VeBridge (Paul Engel)	This script can be run on a daily basis. After launching, no operator intervention is required. The script does the following: <ul style="list-style-type: none"> * Cycles through all the cases in the case list, including those nested in sub folders. After opening them it will... * Backup DB and Notes database in the same manner that Summation does it. * Run the check, pack, blaze (If there are no records in the database, it will skip this step and record a message in the run log) <p>Upon completion, the operator is notified if there were any errors reported so they can review the detailed logs.</p>	

Script Name	Source	Purpose	Comments
Verify Image Page Count	(Part of Summation's internal toolset)	Examines the current table's PGCOUNT field. If the number of pages is incorrect, the PGCOUNT field will be updated. Option to also verify whether the image files actually exist.	In the Column view of the database, select SUMMARY – TOOLS – VERIFY IMAGE PAGE COUNT.

TIP FOR WORKING WITH SCRIPTS

Depending on the script's function, the scriptwriter may include a file that already exists in the [X:]\[Summation Program Directory]\PROFILES\ALL USERS\SCRIPT folder. This might happen, for example, with the files called COREROW.MXS or IMAGES.MXS. In the case of the COREROW.MXS file, the purpose of the file is to populate the context menu accessed by right-clicking on a row number. DO NOT OVERWRITE any existing file that may already contain menu choices. Instead, using a text editor program, copy the contents from the new file and append it to the existing file.

Example of a populated COREROW.MXS file:

```
Send To CaseMap, Script LocateFile("Script\CaseMapImage.vs")
Email Marked Record Review List, Script LocateFile("Script\EmailRecordListHTML.vs")
Print Current EDoc, Script LocateFile("Script\OnDemandDocPrint.vs")
Mark EDocs for Batch Print, Script LocateFile("Script\SetMarkedEDocsToBatchPrint.vs")
Run EDocs Batch Print, Script LocateFile("Script\BatchPrintEDocs.vs")
Open Unitization Dashboard, Script LocateFile("Script\LoadUnitizationDashboard.vs")
```

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