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## **ETC's Best Practices Series: Tips and Tricks for Summation LG Gold/iBlaze**

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### **General Tips**

- ❖ **Use the Online Help file:** Use either the Contents or the Search tab. The Index tab probably isn't going to be very helpful. When you enter a search in the Search tab that consists of a phrase (e.g., lookup table), surround the phrase with quotes (e.g., "lookup table"). Summation doesn't require quotes, but Microsoft (the software used to develop the help system) does.
- ❖ **Favorites in the Help file:** When you locate a topic of interest, open the topic and then save it to the Favorites tab. That tab is specific to you, so you can easily get back to it. You can even rename the topic to a more meaningful name for you, if you want. (Note for 2.8 and subsequent versions: We no longer have a Favorites tab, so you'll have to save your favorite topic pages using Internet Explorer's Favorites menu. Make sure you have "clicked" on the right side of the Help window.)
- ❖ **User Rights:** Although IT staff may object, it is important that users have full read/write network rights to the Summation program directory and to the subdirectories. Summation writes to several files when a user implements an option. If you see odd behavior (crashes, etc.), it could be a rights issue. If the IT staff is uncomfortable with setting that broad a permission, have them call me so we can discuss some possible workarounds.

### **Databases**

- ❖ **Review Sets:** If you're not seeing the ability to add Review sets, then the ability to create new review sets has not been granted in the Administrator Console.
- ❖ **Review Sets:** This is NOT a Summation saved search and, as such, uses a somewhat different context than you may be used to. You may have to use quotes around search phrases, use asterisks for wildcards, spell the connectors using the short names (see appendix in training manual)
- ❖ **Review Sets:** Make sure the Reviewer field is updated (or whatever other field you want to use) in order to "update" the Review Sets status.
- ❖ **Column View Limit:** Summation can display 23 lines of text in a cell in Column view. To view more than that, hit F9 to zoom into the cell.
- ❖ **Searching for an ampersand (&):** Sometimes (primarily when you are searching in the Column view, not in OCR or eDocs), you can insert a carat (^) before the & symbol to force Summation to search for the &.
- ❖ **Copying a Form from One Case to Another:** You can't copy a single form. Sorry. That's the bad news. When you copy, you are copying ALL forms in a database. If you think you might want to use a form from an existing case in new cases, there are several options IF YOU DO SOMETHING BEFORE ANY DATA IS ENTERED IN THE NEW CASE! If you wait until data has been entered in the new case, then your options are much more limited. You might be able to clone one case's forms to a brand new case. You can also set up forms so that all cases that open use the same set of forms. Both of these techniques should be done by advanced users (e.g., IT or Lit Support staff) to avoid possible destruction of data.

## Transcripts

- ❖ **Tranform:** Consider turning off Tranform (located in the transcript loading dialog) before loading a transcript, particularly if, no matter what you do, transcripts just don't seem to load accurately. Tranform can sometimes "mess up" an otherwise perfectly good load. If the transcript doesn't load correctly, and the troubleshooting tips don't help, then run the transcript through the Tranform process (right-click on the transcript, choose that transcript's utilities option, and select Tranform).

## Lookup Tables

- ❖ **Issues Lookup Table:** Try repeating the shortcut in the expanded name of the Issue. This way, users who may have memorized the shortcuts can search either by the shortcut or by the longer issue name. So, for example, the issue for Compensatory Damages may have a shortcut like COMPDMG, so the Issue itself would be entitled *COMPDMG – Compensatory Damages*. Then users can search for either COMPDMG or Compensatory or Compensatory Damages and retrieve records and notes assigned with that issue.

## Images

- ❖ **"Tiptoe" through the Database Faster:** If you're not going to be working with the images but just need to scan the records, with the Column and Image view open, tab the Image window and make sure the Column view is on top. Summation won't try and locate the next image then, making navigating through the records much faster. This works, too, if you don't have a lot of documents in your case imaged (or if the majority of them are eDocs). Or if you're using version 2.7 or later, you can "unpin" the image window. (Click on the pushpin button in the upper right corner of the Image view so that it's on its side. Then, as you scan through the database, the image won't refresh until you click once again on the pushpin button.)
- ❖ **Don't FLOAT the Image View!:** There is a bug in the program (even as of version 2.7.2) that seems to occur when users float the Image view. Some users have reported lost data. Others have reported an inability to type a capital H. (It seems that SHIFT+H, in Summation, is used to hide image mark-ups so, depending on the status of various things such as position of the view, position of the mouse cursor, and maybe even position of the planets!, SHIFT+H won't actually type "H".) So at least for now, keep the Image view docked, and you should be okay.

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