

Summation Extended Features

Advanced • One-Day Instructor-Led Course

For more information contact: info@syntricate.com

The Summation Extended Features course is a one-day course which takes Summation end users to the next level. In our ever-changing world of legal review, Summation offers industry leading tools such as Visualization, Predictive Coding, and the Case Organizer which will propel users into Review. “Review” is the most costly phase of the EDRM. These tools require an advanced mindset and workflow, but will assuredly bring you up-to-speed with industry trends and provide a significant return on your investment. At the conclusion of the course, students will earn a certificate of completion.

Prerequisites:

- It is required that candidates for this course attend *Summation Reviewer* and/or hold the Summation Certified End-User (SCE) credential that assures basic knowledge of Summation.
- Able to understand course curriculum presented in English
- A working knowledge of Windows and exploring Windows and menus
- Using “My Computer,” and managing files and folders

Class Materials and Software:

You will receive any associated materials prior to the course.

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Module 1: Introduction

Topics:

- Student Introductions
- Helpful Information
- Additional Training
- AccessData Summation Certifications
- Updates and Support
- Course Outline

Module 2: Uploading Transcripts

Objectives:

- Defining Transcript Groups
- Managing Transcript Groups
- Identifying Transcript Formats
- Uploading Transcripts
- Uploading Video Transcripts
- Uploading Exhibits

Module 3: Working with Transcripts

Objectives:

- Viewing Transcripts
- Transcript Layouts
- Printing Transcripts
- Searching Transcripts
- Using the Transcript Vocabulary
- Adding/Removing a Note
- Adding/Removing a Highlight
- Creating Reports
- Adding/Removing a Link
- Filtering Notes and Highlights

Module 4: Realtime

Objectives:

- Understanding Realtime
- Starting a Realtime Connection
- Working in Realtime
- Disconnecting from Realtime
- Updating a Transcript

Module 5: Predictive Coding

Objectives:

- Understanding Predictive Coding
- Teach the System
- Run Confidence Scores
- Apply Predictive Coding
- Apply Filters

Module 6: Visualization

Objectives:

- Define Visualization
- Working with File Visualization
- Working with Email Visualization
- Culling with the Social Analyzer
- Working with Geolocation
- Working with Heatmap
- Organizing Data
 - Labels
 - Document Groups
 - Review Sets

Module 7: Case Organizer

- Understanding the Case Organizer
- Navigating and Using Layouts
 - Case Organizer Details
 - Filters and Facets
 - Tags Panel
- Managing and Creating Objects
- Adding & Removing Project Evidence
- Managing Properties
 - Comments
 - Details
 - Tags
 - Files
 - Current Record
- Understanding and Using CO Filters/Facets
- Using Case Organizer Columns
- Creating Reports

