

# Summation Specialist Program (SSP)

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

The Summation Specialist Program is a 5-day comprehensive training and certification program which covers the entire Summation interface including Administration, Case Management, Advanced Processing and Review. Immediately following each course, students will be provided the opportunity to take the corresponding certification exam, while maintaining direct access to the AD Summation software and the instructor for any questions along the way. Take this opportunity to receive comprehensive training on AD Summation and finish your week as a Summation Specialist, the highest level of Summation certification available.

### Prerequisites:

- Able to understand course curriculum presented in English
- A working knowledge of Windows, exploring Windows, working with Windows and menus
- Using “Computer,” and managing files and folders.

### Class Materials and Software:

You will receive the associated materials prior to the course.

### Please Note:

To be considered a Summation Specialist, you must take and pass all three certification exams: Summation Certified Enduser (SCE), Summation Certified Case Manager (SCCM), and Summation Certified Administrator (SCA). This certification is good for 2 years and may be renewed by taking the most current SCE, SCCM, and SCA exams. \*As of Feb 1, 2015, Advanced Processing content is part of the curriculum for the SCCM Certification.

(Continued on other side)



# Summation Specialist Program

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

(Continued)

### ADMINISTRATION

#### Module 1: Introduction

Topics:

- Course Offerings
- Course Outline
- Upgrades and Support

#### Module 2: Users

Objectives:

- User Tab: Creating Users and Associating to a Group and/or Admin Roles

#### Module 3: Groups

Objectives:

- User Groups Tab: Associating users to a Group and/or Admin Role

#### Module 4: Admin Roles

Objectives:

- Accessing Summation
- Admin Roles Tab: Creating Roles and Associating User or User groups to an Admin Role

#### Module 5: System Configuration

Objectives:

- Configuring Active Directory
- Configuring an eMail Server
- Creating Notifications
- Managing Certificates
- Setting Project Defaults
  - Project Paths
  - Time Zones
  - Processing Options
- Identifying Export Options
- Setting Processing Priority Options
- Managing Notes Certificates
- Configuring KFF Replication
- Identifying Export Options
- Settings for:
  - Configuring GeoLocation
  - Configuring the ThreatBridge Server
  - Viewing Alert Rules Engine

#### Module 6: Work Manager Console

Objectives:

- System Console Tab
- Overall System Status
- Work Managers
- Validating Active Work Orders

#### Module 7: KFF

Objectives:

- Define KFF
- KFF
- KFF Tab

#### Module 8: System Log Tab

Objectives:

- System Log Tab
- Tracking Internal Events
- Filtering Events
- Page Tools
- Clearing and Exporting log

#### Module 9: Activity Log Tab

Objectives:

- Activity Log Tab
- Tracking Internal Events
- Filtering Events
- Page Tools
- Clearing and Exporting log

#### Module 10: Data Sources

Objectives:

- Navigating the Data Sources Tab
- Adding People
- Deleting People
- Managing People
- Custom Properties



# Summation Specialist Program

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

### CASE MANAGEMENT

#### Module 1: Introduction

Topics:

- Course Offerings
- Course Outline
- AD Support & Resources

#### Module 2: Getting Started

Objectives:

- Introducing the Summation Interface
- Navigating the Home Page
- Identifying the Case/Project Manager Workflow
- The Home Page – Pre-Review Processes
- The Home Page – Review Processes

#### Module 3: Navigating the Project List

Objectives:

- Identifying Elements of the Project List
- Identifying and Displaying Columns
- Working with Page Attributes
- Filtering and Sorting the Project List
- Deleting a Project
- Managing Custom Properties
- Exporting the Project List to a CSV File
- Cloning Project Properties

#### Module 4: Creating a Project

Objectives:

- Initiating Project Planning
- Identifying & Understanding Project Information
- Managing People/Custodians
- Identifying Processing Options
- Working with KFF Libraries
- Creating a New Project
- Cloning a Project

#### Module 5: Permissions

Objectives:

- Understanding Project Level Permissions
- Navigating the Permissions Tab
- Associating Users and Groups to a Project
- Managing Project Roles
- Assigning Roles to Users and Groups
- Disassociating Users, Groups and Roles
- Managing Access Level Permission

#### Module 6: Managing People/Custodians

Objectives:

- Defining People
- Navigating the People Tab
- Adding People during Project Creation
- Manually Creating People
- Editing People Information
- Using the Global People List
- Importing People from a File
- Adding People during Evidence Processing
- Editing People Associated w/ an Evidence Item
- Managing People on the Data Sources Tab
- Using People in Project Review

#### Module 7: Evidence Processing

Objectives:

- Planning for Processing
- Identifying Data Types
- Creating Custom Properties
- Understanding Import Methods
- Adding and Processing Evidence Items
- Viewing Processing Results
- Organizing Data
  - Labels
  - Doc Groups
  - Review Sets
- Initiating Cluster Analysis

#### Module 8: Importing Evidence

Objectives:

- Defining Importing Data
- Identifying Accepted File Types
- Identifying the Field List
- Managing Document Groups
- Understanding Additional Import Options
- Loading DII Files
- Loading Generic Files
- Loading Concordance / Relativity Files
- Working with Error Logs
- Initiating Cluster Analysis



# Summation Specialist Program

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

### Module 9: Document Unitization

Objectives:

- Understanding Unitization
- Deleting Pages
- Re-ordering Pages
- Adding Pages
- Viewing Unitized Documents
- Best Practices

### Module 10: Configuring Review Tools

Objectives:

- Configuring Markup Sets
- Configuring Redaction Text
- Configuring Highlight Profiles
- Creating Custom Fields
- Configuring Tagging Layouts
- Creating and Managing Review Sets

### Module 11: Global Replace

Objectives:

- Understanding Global Replace
- Identifying Field Types
- Identifying Available Fields
- Committing Global Replace

### Module 12: Production Sets

Objectives:

- Identifying Workflows
- Identifying Label Options
- Creating a Production Set
- Managing Production Set Permissions
- Creating and Managing Production Templates
- Viewing Production Set History and Reports
- Identifying Export Formats
- Exporting a Production Set
- Creating and Managing Export Templates
  - Viewing Exported Files and Reports
- Deleting a Production Set
- Viewing Print Job Status

### Module 13: Exporting Data

Objectives:

- Understanding Export Sets
- Identifying Export Formats
- Creating an Export Set
- Creating and Using Export Templates
- Navigating the Export Tab
- Viewing Export Files

## ADVANCED PROCESSING

### Module 1: Introduction

Topics:

- Course Outline

### Module 2: Creating a Project Overview

Objectives:

- Project Planning
- Project Folder Structure
- Project Creation
- Managing Custodians

### Module 3: Processing Evidence

Objectives:

- Process Modes: Options
- Evidence Processing Results

### Module 4: Processing Options: OCR

Objectives:

- Optical Character Recognition
- OCR Options
- OCR in Project Review

### Module 5: Other Processing Options

Objectives:

- General Email Options
- Email Body Caching
- Advanced Options
- Standard Viewer
- Miscellaneous Options
- Indexing Options

### Module 6: Final Processing Options

Objectives:

- Deduplication
- Cluster Analysis
- Language Identification

### Module 7: Workflows

Objectives:

- Review Workflows
- Working with duplicate and similar items
- Using Email Threading in the Conversation Panel
- Using Bulk Coding to Label and Code Documents



# Summation Specialist Program

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

### REVIEW

#### Module 1: Introduction

Topics:

- Course Outline

#### Module 2: Getting Started

Objectives:

- Workflows
- Logging into Summation
- Logging out of Summation
- Working with the Case/Project List
- Opening a Case/Project
- Default Layouts
- Exiting a Case/Project

#### Module 3: Case Review Page and Panel Navigation

Objectives:

- Default Layouts
- Transcripts & Exhibit Panels
- Moving Viewers to New Window
- Pinning / Unpinning Panels
- Saving a Custom Layout

#### Module 4: Searching Techniques

Objectives:

- Search Terms/Definitions
- Filters/Facets
- Column/Sorting/Clear
- Quick Search
- Highlight Profile
- Search Operators
- Boolean Logic
- Advanced Search
- Searching Natural View
- Searching Using Virtual Fields
- The Searches Tab

#### Module 5: 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 6: Predictive Coding

Objectives:

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

#### Module 7: Document Review Coding/Tagging Documents

Objectives:

- ObjectID's vs. DocID's
- Tags
- Document Groups
- Review Sets
- Coding Documents
- Actions

#### Module 8: Annotations

Objectives:

- Understanding Annotations
- Navigating the Annotations Toolbar
- Working with Highlights
- Working with Redactions
- Working with Notes
- Working with Links



# Summation Specialist Program

## Beginner • 5-Day Instructor-Led Training & Certification

For more information contact: [info@syntricate.com](mailto:info@syntricate.com)

### Module 9: Uploading Transcripts

Objectives:

- Defining Transcript Groups
- Managing Transcript Groups
- Managing Transcript Group Permissions
- Uploading Transcripts
- Uploading Exhibits

### Module 10: Working with Transcripts

Objectives:

- Viewing Transcripts
- Printing Transcripts
- Searching Transcripts
- Adding/Removing a Note
- Adding/Removing a Highlight
- Creating Reports
- Adding/Removing a Link

### Module 11: Realtime

Objectives:

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

