

# Copy Case Merge

## Summation Express/Pro

- Merging a Copy Case

After you have made your changes to the copied case, you can merge the case back into the network application.

Note: You can merge a copied case only ONCE. Once you have merged a copied case, you cannot merge that copy again. You will need to make another copy of the network case to merge the case again. If conflicts appear in a merge, you will be presented with the choice to keep the network version or the copied case version of the conflict. Choosing the copied version will overwrite the network version. The laptop where you copy your case may also be referred to as the "local machine."

- Ensure your laptop is connected to the network.
- Open the Copy Case utility on your laptop.
- In the *Provided Network Login Information* group box, enter the following:
  - A) **Network URL:** Enter the URL for the network Summation application.
  - B) **User Name:** Enter a user with rights to the network.
  - C) **Password:** Enter the password for the user you entered.
- In the *Provide Mobile Login Information* group box, enter the following:
  - A) **User Name:** Enter a user that has access to the case you want to merge.
  - B) **Password:** Enter the password for the user you entered.
- Browse to a Shared Directory. This directory needs to be a location where both the network and local machine has Read/Write access (used to store data temporarily during the merge process).
- Click **OK**.
- In the *Copy Case Modes* group box, select **Merge Changes** from Mobile Case to Network Case.
- In the *Mobile Case* group box, select a copied case from the local machine. The respective *Network case Name* and *Network case Path* will be populated automatically.

## Summation iBlaze

- Copy Case Merge

1. Open the case you wish to copy.
2. From the **Case** menu, select **Tools**, then **Copy Case**. The **CopyCase Wizard** opens to the **Source Case** screen.
3. The name of the current case is displayed. Click **Next** to continue.
4. The **target** is the location to which you are copying the case. If necessary, click **Browse** to find the location of the AD Summation program on the target computer. Except in cases where you are copying to removable media, the **Target Program Directory** must be a directory in which the program files reside.
5. Choose one of the following copy selections:
  - A) **Copy All Elements of Case:** This option copies the Core Database, Transcripts, ocrBase documents, Transcript and ocrBase Notes, the Case Organizer outlines, saved searches, saved layouts, and shared Slideshow folders. If you choose this option, click **Next** to continue. The **Copy Summary** screen is displayed.
  - B) **Copy Designated Elements:** This option allows you to select specific case elements to be copied. If you choose this option, click **Next** to continue.
6. Select the options you want to use for this merge:
  - A) **Allow merge to delete notes**
  - B) **Append modified case organizer tabs**
7. Click **Next**.
8. In the **Transcript** portion of the screen, select the transcripts to copy. If you select **Take only those you want**, a cue card opens. Click **Choose Transcripts** to select the transcripts to copy. Click **Done** on the cue card when finished.
9. In the **Other Selections** portion of the screen, select the items you want to copy.
  - A) **Copy Transcript Links:** If this box is checked, then links associated with the selected transcripts will be copied. To

- In the *Case Elements* group box, select one of the following:
  - A) **Entire Case:** Select this to merge the entire case copy to the network application.
  - B) **Designated Elements:** Select this to choose what elements you want to merge. You can specify to merge the following: Transcripts, Documents, Review Sets, Saved Searches, and Labeled Documents.  
Important: Ensure that you check all the items that you want to merge because you will not be able to merge anything again after the merge is complete. You can only merge a case once.  
Note: What you select in the Case Elements group box will determine the next screen you see.
- Click **Next**.
- If you selected to copy the *Entire Case*, skip to the Summary step.
- If you selected to copy *Designated Elements*, you will see the *Transcript Selection* screen.
- In the *Transcript Selection* screen, make selections among the following and click **Next**.
  - A) **Include Transcript:** Check this to include transcripts in the merge.
  - B) **All Transcripts:** Select this to include all the transcripts in the case, in the merge.
  - C) **Selected Transcripts:** Select this to include only the transcript groups that you check in the merge.
- In the *Documents Selection* screen, make selections among the following and click **Next**.
  - A) **Include Documents:** Check this to include documents in the merge.
  - B) **All Documents:** Select this to include all the documents in the case, in the merge.
  - C) **Documents Assigned to the Labels:** Select this to include only the documents assigned to labels that you check in the merge.
- In the *Review Sets* screen, make selections among the following and click **Next**.
  - A) **Include Review Sets:** Check this to copy no transcript links, click once in the checkbox to deselect it.
  - B) **Copy Notes Database:** If this box is checked, all notes will be copied. It is not possible to copy only notes associated with selected transcripts. To copy no notes, click once in the checkbox to deselect it.
  - C) **Copy Case Organizer Files:** If this box is checked, all Case Organizer outlines will be copied. It is not possible to copy only particular Case Organizer outlines. (See [Exporting Outlines](#) if you wish to copy only selected outlines to another location.)
- 10. A summary displaying your selections in graphical and textual context appears in the lower right corner of the **Database Selection** screen. Click **Next** to continue. The **Image Selection** screen is displayed.
- 11. Select the images associated with the case that you want to copy, and click **Next** to continue. The **Copy Summary** screen is displayed.
- 12. Click **Finish** to begin the copy process.
- 13. The CopyCase Wizard will remind you that the target case already exists and summarizes a list of tasks to be performed. Click **Yes** to continue with the merge process, click **No** to cancel.
- 14. If you continue, the CopyCase Wizard will remind you that any ocrBase, eDocs, Pleadings and Transcripts may need to be re-blazed in the Target case. Click **OK** to continue. The **Case Replication** window is displayed, showing the merge progress.
- 15. When the case replication gets to the **Database records** element, you are prompted to make the target database addable. For this procedure, click **Yes** to add new records to that copy in future merge processes. If you click **No**, you can always modify this setting at a later time if you decide to merge databases. Click **OK** when **CopyCase** is finished.

include review sets in the merge.

B) **All Review Sets:** Select this to include all the review sets in the case, in the merge.

C) **Selected Review Sets:** Select this to include only the review sets that you check in the merge.

Note: Production sets cannot be changed. You will not be able to merge production sets back in to the network case. You can copy them for viewing purposes only.

- In the *Summary* screen, review the selections you have made and click **Start**.
- Click **Yes** to perform another copy or **No** if you are done.
- Click **Close**.