

Loading Data in Express vs. iBlaze

Summation Express/Pro

- Adding Evidence Using the Evidence Wizard
 1. Open the *Add Evidence Wizard* for the case.
 2. Select **Evidence Data Type and Import Method**.
 3. Adjust appropriate setting selections for CSV Import or Immediate Children method.
 4. Specify Custodian and Time Zone.
- Importing Evidence Using Import
 1. Open the Import window for the case.
 2. Select **DII** or **CSV** file type.
 3. Select **Import Destination for Existing Document Group** or **Create New Document Group**.
 4. Map the fields in the document. May need to create Custom Fields prior to loading.
 5. Choose **DII** or **CSV** options for loading.
- Uploading Transcripts
 1. Open *Case Review* for the case.
 2. Select **Upload Transcript** from the Transcripts folder.
 3. Enter **Deponent** and select **Deposition Date**.
- Uploading Exhibits
 1. Open *Case Review* for the case.
 2. Open **Upload Exhibits** from the Transcripts Folder.
 3. Select **Transcript Group**, **Exhibit File**, and enter **Description** for loading.

Summation iBlaze

- Import Summaries
- Loading DII
- Load OCR Control List
- eDiscovery Console to load Native files.
- Load Transcript
- Load Briefcase