



COMMONWEALTH LEGAL

Commonwealth Legal's Summation "Tip of the Month" for January

Tally Feature

Use the highly underutilized Tally feature (available in programs such as Summation) to:

1. Familiarize yourself with key characters, timelines and documents in record time:

Obtain an "aerial view" of the contents of a given field, either for your client's documents or for the other side's by simply clicking on the Field Header and selecting Tally.

- Tallying the *Docdate* field will reveal key periods of activity leading up to the action.
- Tallying the *Doctype* field will reveal the volume of, e.g., emails involved in your file.
- Tallying names fields (e.g., *Author*, *BCC*, etc.) will give you a sense of the people involved, how they have authored documents, and their various corporate affiliations.

2. Drill down to key search results without having to type or master complicated searching language:

Simply Tally a given field (e.g., *Doctype*) and select the item for which you wish to search. The Tally Dialog navigates directly to those entries in the sorted database. Follow up with a Context (right-click) search on that entry in the Column view and review your results.

Continue using the Tally feature in combination with the Context search to perform further subset searches (i.e., refine your current search) using values from another field (e.g., *Docdate*) and drill down even further into this set of documents. Revert back to the previous set of results using *Search | Previous Subset*.

For further training tips or to arrange for a Summation training session, contact your Account Representative or one of our Certified Trainers at 1-866-LAW-SCAN (529-7226.)

You can also view previous "tips of the month" at www.commonwealthlegal.com

