

AccessData® iBlaze Case Management

Intermediate – Two-Day Instructor-Led Course

The AccessData® iBlaze Case Management course provides the end user with the tools to go to the next level in iBlaze and focuses on some of the bells and whistles for an end user outside of just getting started in iBlaze together with more technically advanced features. The course is geared toward a strong legal assistant, litigation support specialist or paralegal.

Prerequisites:

Although not required, it is *strongly recommended* that candidates for this course attend iBlaze Fundamentals and/or hold an SCE certification which assures basic knowledge of iBlaze. Candidates should have a working knowledge of Windows, exploring Windows, working with Windows and menus, using "My Computer", and managing files and folders. It should also be noted that candidates working toward the Summation Certified Case Manager (SCCM) credential should also participate in the iBlaze Loading Data course in order to prepare for the exam.

Class Materials:

You will receive the student training manual and CD containing the training material, lab exercises and class-related information.

Module 1: Introduction

Topics:

- End User Prerequisites
- Course Outline
- Upgrades and Support

Module 2: Backing up the Database

Objectives:

- Define a database backup
- Backup a Database
- Restore a Database
- Delete Backups

Student Practical and Review

- Create a Backup
- Restore a Backup
- Delete a Backup

Module 3: Review Sets

Objectives:

- Review Set Discussion
- Create a Review Set
- Open/Close Review Sets
- Edit Review Sets
- Copy/Delete Review Sets

Student Practical and Review

- Create a Review Set
- Open and Close a Review Set
- Edit a Review Set
- Copy a Review Set
- Delete a Review Set

Module 4: Global Search/Replace

Objectives:

- Global Replace Discussion
- Perform Basic Replacements
- Apply Templates with Global Replace
- Replace a Field with Values from Another
- Place Data with an Incremental Value
- Insert Data at the Beginning of a Field
- Append Data to the End of a Field

Student Practical and Review

- Replace Text in a Field
- Replace Words in a Field
- Replace the Entire Contents of a Field
- Replace a Field with Values from Another Field
- Replace Data with an Incremental Value
- Insert Data at the Beginning of a Field
- Append Data to the End of a Field

Module 5: Form Editor

Objectives:

- Access and Select Forms
- Create a Form Based on an Existing Table
- Create a form based on a New Table
- Edit an Existing Form
- Edit Field Properties
- Delete a Column, Form or Table

Student Practical and Review

- Open and Switch Forms
- Edit an Existing Form
- Create a New Form Based on an Existing Table
- Edit Field Properties
- Add a Lookup Table to a Field
- Remove a Lookup Table from a Field
- Delete a Column from a Form
- Delete a Column from a Table
- Delete a Form

Module 6: Cloning a Database

Objectives:

- Clone a Database Discussion

Student Practical and Review

- Clone a Database

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Module 7: Merging Lookup Tables

Objectives:

- Merge Individual Lookup Tables
- Merge All Lookup Tables
- Export Lookup Tables

Student Practical and Review

- Merge a Single Lookup Table
- Merge All Lookup Tables
- Export Lookup Tables from a Case

Module 8: Production Sets

Objectives:

- Outline Production Set Workflow Best Practices
- Create Production Sets
- Retrieve Production Sets
- Review Production Sets
- Delete Production Sets
- Create and Modify Production Properties
- Set the Production format for eDiscovery

Student Practical and Review

- Create a Draft Production Set
- Create a Production Set from a Search
- Create a Production Set from Marked Records
- Retrieve Production Set Documents
- Add Documents to a Production Set
- Remove Documents from a Production Set
- Number and Renumber Documents
- Create a Production Set Briefcase
- Retrieve Omitted Documents
- View and Modify Production Set Properties
- Delete a Production Set
- Set the Production Format for eDiscovery

Module 9: Briefcases

Objectives:

- Create a Briefcase
- Export a Briefcase
- View Briefcases
- Import Briefcases
- Export Briefcases

Student Practical and Review

- Create a Briefcase
- Create and View a Browser Briefcase
- Export a Briefcase (SBF)
- Import a Briefcase

Module 10: Highlighting Tools

Objectives:

- Highlighting Tools
- Coding Palette
- Using Highlights and Transcript Notes
- Filter and Search Highlights
- Setting Highlight Defaults

Student Practical and Review

- Use the Highlighting Tool
- Change the Highlight Color
- Color Code by Issue
- Add a New Issue Using the Coding Palette
- Add Issues to the Favorites List
- Delete Individual Highlight Sections
- Delete All Highlights
- Filter Highlighted Excerpts

Module 11: Transcript Designations

Objectives:

- Assign Designations
- Set up Transcript Designations
- Navigate Transcript
- Change or remove Transcript Designations
- Print Designations

Student Practical and Review

- Create Transcript Notes and Assign Issues to the Notes
- Assign Transcript Designations
- Set Up Transcript Designations
- Navigate Transcript Designations
- Change Transcript Designation Types
- Remove Transcript Designations
- Print Transcript Designations

Module 12: Custom Tools

Objectives:

- Update Table Structure
- Add Columns to Tables
- Auto-Fill EndDoc
- Add Transcript Links

Student Practical and Review

- Update Table Structure
- Add Columns to a Table
- Auto Fill Endoc#
- Add Transcript Links

Module 13: Saved Searches

Objectives:

- Work with Saved Searches
- Save an Integrated Search
- Save a Document Group
- Save a Boolean Search
- Run a Saved Search
- Share a Saved Search

Student Practical and Review

- Save a Search from a Document Group Search
- Save a Search from an Integrated Search
- Save a Search from a Boolean Search
- Run a Saved Search
- Share a Saved Search

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Module 14: Petrification Tools

Objectives:

- Petrify individual documents
- Petrify marked documents
- Petrification Error Handling

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- Petrify Individual Documents
- Petrify Marked Documents

Module 15: Chronology of Events

Objectives:

- Chronology of Events Overview
- Working with Events
- Customize the Chronology of Events
- Mark Events for Searching or Printing
- Work with Event Links

Student Practical and Review

- Add an Event
- Edit an Event
- Search Events
- Add Event Columns
- Remove Event Columns
- Reorder Event Columns
- Mark Events
- Unmark Events
- Create Core Database Links
- View Links

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