

Trial Presentation Software: Coding Database

As paralegals, we sometimes have to improvise. We don't always have the right tools for the job, but if we bend what we've got, often we can do the job right.

Many of us do not have robust litigation database programs such as Summation or Concordance at our disposal. Small and mid-sized cases and firms generally cannot justify the cost. More firms, however, are purchasing trial presentation software (e.g., TrialDirector or Sanction) as juries increasingly come to expect some electronic display of evidence in court. Using these programs to manage discovery instead of only using them at trial time can make you a more efficient paralegal.

Ask vendors to provide a load file containing some coded fields, such as "produced on", "produced by", "confidential", "privileged", "response to xyz discovery request", etc. As long as they do not have to do detailed coding (meaning in this context that there are not numerous document breaks only a few pages apart), it should be inexpensive (or even included in the scanning pricing) to provide this page level coding. Even if you do your scanning in-house, a vendor can use a disk of your images to provide a load file with objective data at a reasonable price. You can create a *.csv from Excel or litigation database software and the vendor can use it to marry up the images to the coding so you can import them into your trial presentation software. Prior to importing the data, however, make sure your coding table already has fields for this information, and it can save you hours of time coding this basic information.

Why code such information in Sanction (or TrialDirector), a trial presentation software

program? You have to track production information anyway, so why not make the most of a program your firm has already purchased. If you have a program that captures the information you need more efficiently, by all means, use it. This article is geared toward those who are limited in the types of software programs to which they have access.

Speaking from experience, centralizing as much information as possible into one location sure beats having to look at multiple files, word processing documents, databases, pleadings, or notebook indexes to figure out when something was produced and by whom, whether a document is an exhibit to one or more witness depositions, whether it's a key document used as evidence

supporting a summary judgment motion, etc. If you have trial presentation software, why not use it? Is someone reviewing the notebook you need? View the document electronically to see if it contains the information you need, rather than having to track down a file and thumb through the pages.

If you set up a standard coding template with fields to track various information paralegals collect throughout litigation, you can dramatically increase your efficiency and ease litigation management. See sample Master Coding Template created in Sanction.

TIP

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The image shows a screenshot of a software interface for a Master Coding Template. The form contains several input fields and checkboxes. At the top, there are fields for 'Doc_Date', 'Doc_Type', 'Source', 'Event_Date', 'CheckTest', 'ProdBy', and 'ProdOn'. Below these are checkboxes for 'Exhibit', 'MTD', and 'MSI'. There are also text input fields for 'Description', 'Summary_KeyText', and 'RevisedNotes'. At the bottom, there are dropdown menus for 'Issues' and 'Witnesses'.

The template can be copied from case to case and you can code as much or as little information as the case merits. Further, exporting data into word processing software is a breeze with the Report Writer Add-In for Microsoft Word (included with Sanction software).

ID	Description
0001	Please read this document
VS0005	General information concerning common image file types used in Sanction.
VS0006	The cute kid is our own Jennifer's son Zach.
VS0009	Load Files - basic information about load files.
LFSMA	Law Firm maintenance agreement.
LFSMA-002	
LFSMA-003	
LTR0001	These are a series of letters from clients.
LTR0002	
LTR0003	
LTR0004	
LTR0005	
LTR0006	
LTR0007	
LTR0008	
LTR0009	
LTR0010	Air National Guard Donation
MEULA	End-user license agreement.
MEULA-002	
Online Video Synch	Media Kit online video services page.
SANCTION PDF Plug-in	Media Kit PDF Plug-in page.
SANCTION Software	Media Kit Sanction Software page.
SMART Training	Media Kit Training Services page.
Video Conversion	Media Kit video services page.
OS0001	Order confirmation email from online synch.
OS0002	Billing confirmation email from online synch.
OS0003	Order complete email from online synch.
Sanction Order Form	Sanction II Order Form
Training Order Form	Training Order Form

Add a title and you have a notebook index or a chronology. Add a caption and you have an exhibit list. For answers to your questions or for more information, call or email Litgistix.

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(Reagan is an advanced certified trial practice paralegal with over 10 years experience. She has focused on complex business litigation and medical malpractice defense, while specializing in the efficient use of litigation support software).