

# Summation 6.2 and Patches

## Release Notes

Document Date: 6/21/2017

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## Introduction

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This document lists the new features, fixed issues, and known issues for this release. All known issues published under previous release notes still apply until they are listed under “Fixed Issues.”

- See [6.2 Patch 3](#) on page 1.
- See [6.2 Patch 2](#) on page 3.
- See [6.2 Patch 1](#) on page 3.
- See [6.2 Release Notes](#) on page 5.

## 6.2 Patch 3

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Document Date: 6/21/2017

### Patch 3 New and Fixed Issues

The following have been added or fixed in this release:

- A new project-level permission *Export Production Set* has been added. (8720)

# Patches Important Information

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## General

- Summation does not support Internet Explorer 8. Make sure that you are running Internet Explorer 9 or higher.

## Patches Upgrade

- Before applying a patch release, backup the \ProgramFiles\AccessData folder. The patch will update DLL and CONFIG files under this folder. If you have a problem with the patch, you can simply revert to your backed-up files.
- After upgrading, it is important to clear your Internet Explorer cache before using the upgraded version's web console.

## Known Application Issues in 6.2 Patch 2

- Native text extracted from a PDF may be inaccurate or absent if the PDF's security settings specifically disallow Page Extraction. No error or warning message will be displayed in the application or its logs. (8474,8679)

## Known Application Issues in 6.2 Patch 1

- Dashboard
  - Some columns cannot be filtered. (6955)
  - In Summation, the View Dashboard permission is not available when configuring an Admin Role. (8503)

## Other Important Information

See [6.2 Important Information](#) on page 13.

## Comments?

We value all feedback from our customers. Please contact us at [support@accessdata.com](mailto:support@accessdata.com), or send documentation issues to [documentation@accessdata.com](mailto:documentation@accessdata.com).

## 6.2 Patch 2

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Document Date: 6/2/2017

### Patch 2 New and Fixed Issues

The following have been added or fixed in this release:

- Error logs are written correctly when importing certain files. (8401)
- Users that have been de-activated can be re-activated. (8306)
- The LawDrop page is available to the appropriate users. (8622)

#### Evidence

- LX01 files are supported as evidence images. (8201)

#### Review

- Bulk Printing no longer causes a “userid not set” error. (6869)
- A “Session Timed Out” error is not displayed when using Case Organizer and opening *Review*. (8083)
- The View Dashboard permission is available when configuring an Admin Role. (8305)

## 6.2 Patch 1

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Document Date: 4/24/2017

### Patch 1 New and Fixed Issues

The following have been added or fixed in this release:

#### Dashboard

- If you are using an Integrated Windows Authentication (IWA) environment, Active Users are displayed in the Dashboard and no error is displayed. (7507, 7762)

#### Project Creation

- In certain circumstances, the following error is no longer generated in the System Log: "The case id provided is not valid, or you do not have the required permissions to access it." (4230)

#### Clone Project Properties

- When cloning project properties, *Issue Values* and *Labels* are cloned properly. (8016)

#### Transcripts and Exhibits

- You can add or change a date for a transcript note. (7973)
- When exporting a transcript to PDF, the PDF no longer has a red “Evaluation” watermark on it. (7975)

## Redactions and Branding

- Text-based redactions work correctly when drawn over text that has both single quotes and double quotes in the same redaction. (7957)
- The font size used for branding is correct when the default font size was selected. (7959)

## Bulk Print/Imaging

- When using a distributed processing environment, bulk printing and creating SWF images on-the-fly for the Standard Viewer work correctly. (7547)

## Geolocation

- ElasticSearch is no longer required in order to display the location of photos with EXIF data.
- Geolocation works properly after multiple sets of evidence have been processed. (7863)

## LawDrop

- When logged in as a SubAdmin, the LawDrop icon is displayed correctly. (7687)

# 6.2 Release Notes

Document Date: 4/3/2017

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## 6.2 New and Improved Features

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The following items are new and improved features and feature enhancements for this release:

### System

#### Platforms

The following are changes in supported platforms

- Windows Server
  - eDiscovery is now officially supported on Microsoft Windows Server 2016
- Database
  - eDiscovery is now officially supported on Microsoft SQL Server 2014
  - Official support for Microsoft SQL Server 2008 R2 is being deprecated
- Agent Support
  - Enhanced Support on Windows 8, 8.1, and 10
  - Official support for Mac OS 10.11 and 10.12
  - Official Support for Windows Server 2008 R2, 2012 R2, and 2016
  - Official support for Red Hat Linux 6.x and 7.x  
The 6.2 Linux Agent requires GLIBC 2.17 or newer. Collection from a system running an older GLIBC version can be attempted using the 6.1 version of the Agent, which can be obtained by contacting AccessData Support. A system's GLIBC version can be determined by running the following command: `ldd -version`.

#### Encryption

- *Federal Information Processing Standard (FIPS)*  
Summation has been updated to use FIPS-compliant encryption classes, enabling its installation and functionality in environments that enforce FIPS 140-2 compliance.

## Installation/Upgrade

- Microsoft .NET

Microsoft .NET version 4.5.2 is now a pre-requisite. If a previous version of .NET is installed, it will be silently and automatically updated.

After .NET is upgraded to version 4.5.2, a reboot is required.

## Case List

The Action column in the Case List has been moved to the left of the Project Name column.

## Dashboard

Summation 6.2 introduces a Dashboard that provides a single, comprehensive window into the status of many of the software's core functionalities through a series of "widgets", each focused on specific aspects of the product:

- A *Collections* widget which displays a graphical summary of the status of collection jobs performed over the previous week
- A *Processing Jobs* widget which displays a graphical summary of the status of processing jobs performed over the previous week
- An *Active Users* widget which displays a list of the users who are currently logged into the system.
- A *System Overview* widget which displays information on the number of Cases in the system, as well as the total number and total size of the records contained within those Cases
- A *Review Set Status* widget which displays a graphical representation of the Review Sets within the system.
- A *Litigation Hold* widget which displays a graphical representation of the Custodian acknowledgement status of the Litigation Holds that exist within the system.
- A *Litigation Holds - Top 10* widget which displays a list of the top ten Litigation Holds contained within the system based on the number of Custodians

The chart type for the graphical widgets can be customized to display data in a pie chart, horizontal bar chart, or vertical bar chart format.

Selecting any of the widgets opens a Details window that provides users with the ability to sort, filter, and export the widget's information, as well as links to the data in their standard interface.

Users with the Application Administrator role will have full access to the new Dashboard. A new View Dashboard global permission has also been made available to allow non-System Administrators access to the new Dashboard.

# Projects

## Processing Options

### Entity Extraction

This processing option is now disabled by default.

### Standard Viewer Options

The Enable Standard Viewer processing option has been renamed to *Default Standard Viewer* and its behavior has been updated in the following ways:

- When the *Default Standard Viewer* option is disabled, the *Alternate File Viewer* will be the default viewer in the *Review* interface.
- When the *Default Standard Viewer* option is enabled, the *Standard Viewer* will be the default viewer in the *Review* interface.
- A new *Default Standard Viewer* setting has been made available in the *Review* interface's *Layout* drop-down. This setting is initially set to match the processing option that has been selected for that project, but can be changed by individual users at any time.  
When the *Default Standard Viewer* option is enabled, native files will be displayed in the *Standard Viewer*. SWF files are automatically generated (if they do not already exist) on-the-fly when records are first viewed with the *Standard Viewer*.  
When the *Default Standard Viewer* option is disabled, native files will be displayed in the *Alternate File Viewer* and SWF files are not generated when records are viewed.
- A new *Pre-generate Standard Format* setting has also been provided to instruct the system to pre-generate SWF files for display in the Standard viewer, eliminating the need to generate SWF files on-the-fly.
  - The following file categories are available for SWF pre-generation:
    - Documents
    - Email
    - Presentations
    - Spreadsheet
    - Graphics
    - Mobile Phone
  - When the Pre-generate Standard Format option is selected, the system will initiate an imaging job for the chosen file categories after the evidence has been processed. A message containing the imaging job's ID will be displayed in the evidence's Processing Status Messages and the progress of the imaging job can be monitored on the Project's Work List.
  - The default timeout value for SWF generation is 5 minutes, but is configurable. Please contact AccessData Support for assistance changing the value of this timeout.

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**Note:** When upgrading from a previous version, if a project had the Enable Standard Viewer option enabled it will operate as if the Default Standard Viewer option is enabled. It will also enable the Pre-generate Standard Format option for Documents, Email, Presentations, Graphics, and Mobile Devices file categories.

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## Processing

- Cancellling and Rolling Back Evidence Processing

Prior to version 6.2, the ability to cancel evidence ingestions was limited to the FTK line of products. A *Cancel Processing* option has been added to the *Project Evidence* tab, which provides users with sufficient permissions the ability to cancel an active evidence ingestion directly from the web interface.

When an evidence ingestion is cancelled, the system will attempt to "rollback" any changes made to the Project by the cancelled evidence ingestion, including the removal of records from the database and any related indexing.

**Important:** The rollback process will run as a separate job in the background. Other jobs will continue to process based on priority. If the canceled evidence ingestion is large, the rollback process may take several hours to complete. If the rollback does not succeed within 24 hours, it will be cancelled automatically by the system.

- Entity Extraction - People

The list of source names used to identify proper names within a data set when processing with the *Entity Extraction* option for *People* selected has been increased significantly.

- The Processing Manager (ProcessingHost.exe and Distributed Processing Manager) will now allow for updating the database more efficiently and increasing the threading capabilities.

## KFF

- The NSRL data has been updated to version 2.54.

## Litigation Hold

- The Custodian Acknowledgement page has been updated to display a message clarifying that "No Attachments" exist when no supporting documents have been attached to the Litigation Hold.

## Review

### Conversation Panel

- The grouping and display of email conversations has been changed in the following ways
  - Processing time has been improved.
  - Conversations are now grouped using the ConversationTopic (email heading) and then split into threads using additional metadata (such as, To, From, CC, BCC, Subject, SentDate, ReceivedDate, ConversationIndex, InReplyTo, Messageld, etc.).
  - The behavior of the *Conversation Panel* is similar as before, but no longer displays *Emails In Cluster* data. The *Conversation* view (from the *Views* options) has been removed from the *Review* interface.

### Standard Viewer Option

- Individual end-users are now provided the ability to select either the *Standard Viewer* or the *Alternate Viewer* as their default Native file viewer for a project using the *Default Standard Viewer* option in the *Layout* drop-down within the *Review* interface.

Enabling the Default Standard Viewer option will result in native records being displayed in the Standard Viewer. Disabling the Default Standard Viewer option will result in native records being displayed in the Alternate File Viewer.

## Search

- The Quick Search bar within the *Review* interface now supports that ability to search for Bates numbers. This search functionality supports the use of wildcards.



## Bulk Print

- The behavior of the system's Bulk Print functionality has been modified to better leverage any existing TIF and PDF images associated to a record. In situations where no images are associated to a record, the system will now generate PDF images for printing instead of TIF images, which is a faster back-end process and is expected to decrease the amount of time necessary to generate a printable image format.

## Case Organizer

- There is now an Expand All / Collapse All option for Case Organizer Notes.

## Exports and Production Sets

### Exporting PST/NSF

- In previous versions, exports and productions of NSF data using the "Output to PST/NSF" option would export the records in PST format only.  
Exports and productions of NSF data using the "Output to PST/NSF" option will now export the records in an NSF format. Data from a PST file will still be exported in a PST format.

### Browser Briefcase

- The columns in the Browser Briefcase can now be sorted.

### Default Export Templates

- Four new default field export templates have been made available for use with Production and Export jobs:
  - Summation Export Template
  - Summation Email Export Template
  - Relativity Export Template
  - Relativity Email Export Template

These templates contain the fields most commonly associated with DII (Summation) and OPT/LPT (Relativity) loadfile formats and will allow users to quickly and accurately configure loadfiles associated with Production and Export jobs. These templates are not editable, but can be modified and saved as a custom template if desired.

### Export Logging and Reporting

- Logging and reporting have been improved for failures or errors during export:
  - If there was an issue during the export, the final status now shows Completed with Errors
  - Specific information is recorded in the reports and logs.

## 6.2 Fixed Issues

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The following have been fixed in this release:

### System

#### Performance

- Changes have been made to reduce load times on the Users tab. (39886/3131)
- The performance of indexing on distributed systems has been improved when the *Geolocation* processing option is enabled. (42535/3048)
- Small Print jobs no longer get delayed waiting for other large jobs. (2323/4649)

#### DB Control

- DB Control properly restores projects that were archived in earlier versions. (41850/2018)

### Project Management

- Project Role Permissions can now be added/modified for a group when the User belongs to the group being granted permissions. (4491/41652)
- Project folder paths may now contain a period. (29327/4676)
- The Standard Viewer setting is now applied properly for cases created in FTK/LAB. (42550/2062)

### Data Sources

- When creating a new *Custodian Field* under *Data Sources*, and selecting a custodian, and then putting information in that field for that custodian, the data is now saved. (41779/4482)

### Lit Hold

- Deactivating or reactivating a Litigation Hold will not automatically send out notifications to Custodians and IT Staff. (31032/2106)
- When you click *View in eDiscovery* from the *Approvers* page, it opens up the LitHold page with a filter applied that lists the correct hold. (37448/2096,4848)
- After selecting to acknowledge a Lit Hold, the *Accept* button is now the default button, not the *Cancel* button. (3336)
- Some terms on various pages have been clarified. (3229)

### Import

- Incorrect pathing in a DAT file is properly identified and reported. (30848/4095)
- "The Process Files to Extract Metadata option is handled properly. (39394/4236)
- "Improvements to the speed of large imports. (35543/4622,6286/4668)

### Processing

- EX01 and LX01 image formats are ingested correctly. (36219/2120,4609)
- The speed of indexing during the processing of MacOS hard drive images has been improved significantly. (41648)

## Review

### Evidence

- Attachments to MSG files are properly downloaded from the evidence link. (29829/4012)
- WAV files are properly downloaded from the evidence link. (28560/4675)

### Search

- All search hits are highlighted, even characters in foreign languages. (2009)
- A simple search report generates correctly when reporting on search hits that are a subset of labeled objects. (42664/3133)
- If you try to download a search report that has been deleted, you will now get a message to generate the report again. (3132)

### Transcripts and Exhibits

- When uploading a large exhibit and it initially fails, it no longer continues to automatically fail. (4880)

### Coding

- The Labels displays correctly when added to the coding panel. (30800/3995)
- Read-only Custom Fields are no longer editable in the Coding Panel. (6121)
- Coding in the Pop-Out Viewer window will now save more reliably. (34949/6438)
- The number of records coded manually and using predictive coding is correct in the worklist. The count of records skipped are also correct. All records not coded either manually or using predictive coding are counted as skipped records. (4995)

### Case Organizer

- Improved functionality of the Case Organizer action. (3684)

### Bulk Print/Redacting

- When using Local Bulk Print, redaction reasons properly display on pages of multi-page native documents if you have 2 or more redaction reasons for all the pages. (40142/3023, 41784/4929)

### Other

- When in Review, and clicking the Current Object ID number, and then selecting to save the file, and the file has a non-Latin filename, the saved filename contains the correct text. (42239/2036)
- When you click "Current Object ID" and save document to a local disk, the Chinese filename will maintain correct characters. (4321)
- Chinese characters display properly in msg and eml evidence files and attachments. (42727/2167,6297)
- In a Chinese BSC environment, you can set the OverrideSystemCulture to be "en-us", and English words appear correctly. (2139)
- Chinese characters are highlighted correctly following a search. (37016/2009)
- LawDrop - You can now upload any document with Chinese filename or special symbols. (2043)
- If a deposition transcript fails to upload successfully, subsequent exhibit uploads are no longer adversely effected. (38736/3005)

## LawDrop

- Files with special symbols or Chinese characters in the filename will upload correctly. (42240/2043)

## Exports and Imaging

- “Current Date” formats are preserved when imaging files. (3732)
- Ringtail exports now properly display the correct page numbers. (2272)
- Branding works properly for TIFF or MPTIFF image files. (3680)
- Fixed an issue causing branding images to be different sizes on the same page. (32992/3984)
- When producing to PDF with page level branding, data in the forms is properly produced. (30709/3992)
- Fixed an issue that required large DII files be split in order to load successfully. (4688)
- When creating a production set and using the Single-Page TIFF imaging format, and adding a Center Footer and Far Footer in the branding, branding is carried over correctly for image on TIFF and PDF. (4825)
- Production sets can be manually deleted. (2086)
- Produced records generate redactions correctly rather than slipsheets. (3763)
- Improved scaling of images with header and footer branding. (41468/4047)
- The scaling of redaction text has been improved. (29412/4010)
- ANSI RTF emails image correctly. (29507/2987)
- Records are imaged correctly when excluding a label from the export. (41456/4493)
- Image branding has been modified to reduce the chance of inadvertently covering the contents of the document. (33714/3001)
- PDFs containing unusual data are imaged correctly. (33318/4632)
- Text near redactions on PDF files is maintained correctly during imaging. (6459)
- The system log does not report a file conversion error for a PST container file when the .pst record is not included in the label for creating the production set. (40976)

## FTK Compatibility

- Cases that are archived and detached from FTK are now removed from Summation. (2094)

## 6.2 Important Information

### General

- Summation does not support Internet Explorer 8. Make sure that you are running Internet Explorer 9 or higher.

### Requirements

- For general software and hardware requirements, see <http://accessdata.com/solutions/e-discovery/summation/technical>

### Consolidated Services and Installation Settings

- **Important! Read this before installing or upgrading.** During a new installation or upgrade, you must properly set the location of some services.

Starting with version 6.0, the following services are consolidated into the *eDiscovery Services*.

- *Infrastructure Services*
- *Work Distribution Services*
- *License Services*

During an installation or upgrade, you are still prompted to enter the locations of these legacy services. You **must** configure the location for these three services so that they match the location of your 6.x eDiscovery Services computer.

The image displays two side-by-side screenshots of the 'Service hosts' configuration window. The window title is 'Service hosts' and it contains the instruction 'Enter the host name or IP address where the services are located'. The left screenshot shows the 'eDiscovery Services' field highlighted in yellow, and the 'Work Distribution Services' and 'License Services' fields highlighted in red. The right screenshot shows the 'Infrastructure Services' field highlighted in red. Both screenshots show a list of service categories with input fields for their host names or IP addresses. The categories listed are: eDiscovery Services, Work Distribution Services, Orchestration Services, License Services, PSS Atlas Sync Services, and LawDrop Server 'domain/IP' address. The right screenshot also shows: Infrastructure Services, FTK - Services, Async Processing Services, Integration Services, and Processing Manager. Both screenshots have '< Back', 'Next >', and 'Cancel' buttons at the bottom.

- **New 6.x installation:**  
When prompted for the location of the three legacy services, you must use the same location as the eDiscovery Services computer.
- **Upgrade from 5.x to 6.x**  
When you installed 5.x versions of Summation and eDiscovery, you could specify a unique location for each of the services. During a 5.x to 6.x upgrade, those previous services locations are carried through.  
If you specified a different location for any of these three legacy services, during the upgrade you **must** change them so that they match the location of your 6.x eDiscovery Services computer.

- The new LawDrop Server setting lets you share files stored in your LawDrop with users outside of the system. This setting needs to be edited with either the domain or the IP address of the server running MAP not just "localhost".

## Upgrade

- When the application is upgraded, the Enabled Standard Viewer Processing Option is turned off because it is a slower performing processing option. If you want this functionality, you need to enable it manually in **System Configuration > Project Defaults > Processing Options**.
- If upgrading to 5.6, we recommend upgrading SiteServer from the previous PostgreSQL 9.1.11 to 9.3.5 (which is included in the ISO). The 9.1.11 version will function, but in the console, child site servers will appear in a yellow error state. (15980)
- When upgrading to version 5.6, and when upgrading Site Server to use the latest version of PostgreSQL, you must first wait for all of your Site Server jobs to clear, then you can un-install and re-install PostgreSQL.

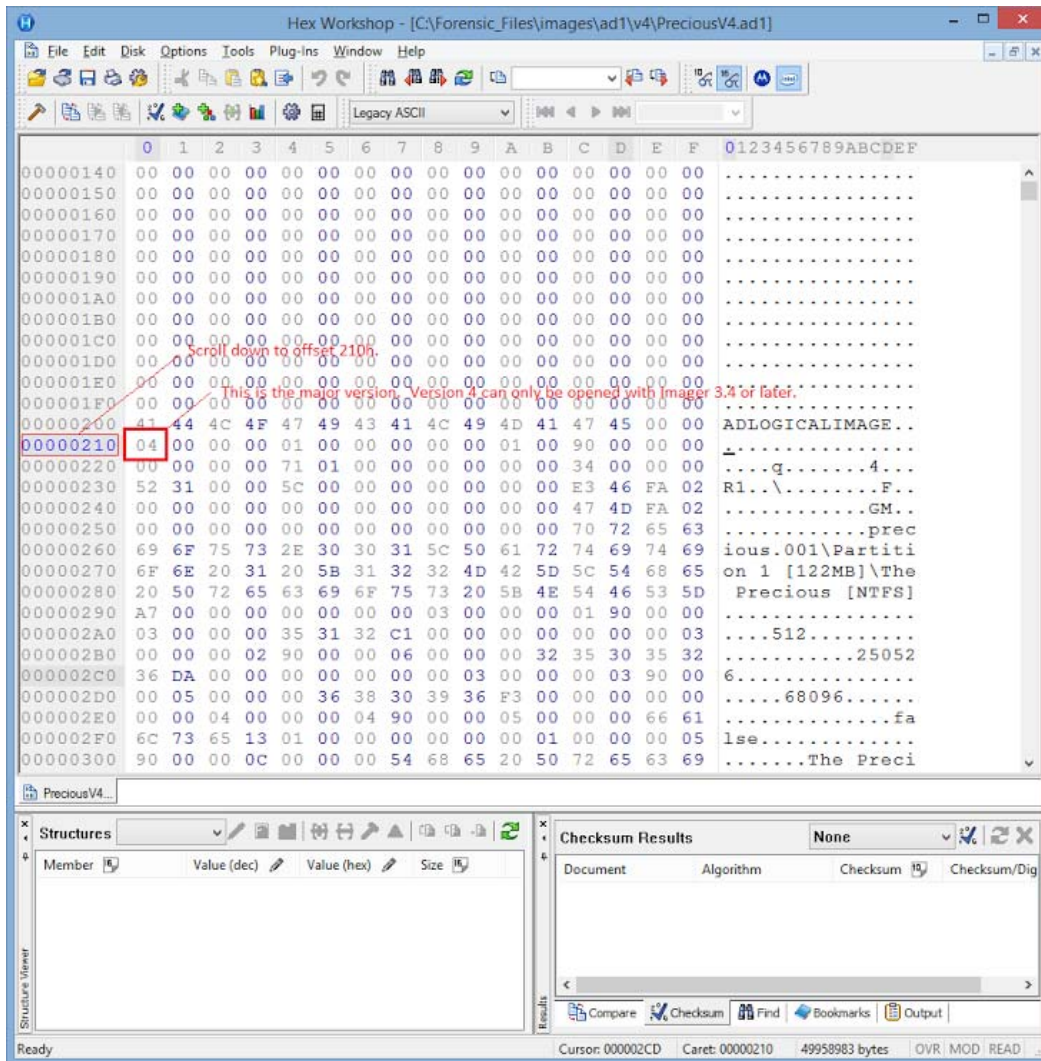
## Updated Imager and AD1 Files

Any AD1 created by FTK/Summation/eDiscovery 6.0 or later can only be opened with Imager 3.4.0 or later.

Imager 3.4 can be freely download from the AD website: <http://accessdata.com/product-download>

Using an older version of Imager will result in an "Image detection failed" error.

This happens because the AD1 format was enhanced to support forward compatibility between AccessData applications. Newer AD1 files have a version 4 in the header instead of 3. A hex editor can be used to quickly determine if your AD1 is v3 or v4 (see screen shot below).



## 6.2 Known Issues

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The following are the Known Issues for this release:

- Dashboard
  - If you are using an Integrated Windows Authentication (IWA) environment, Active Users are not displayed in the Dashboard. (7507)
  - Some columns cannot be filtered. (6955)

## Comments?

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