Summation 6.3 Release Notes

Document Date: 10/25/2017

Introduction

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."

- 6.3 New and Improved Features (page 1)
- 6.3 Fixed Issues (page 4)
- 6.3 Important Information (page 5)

6.3 New and Improved Features

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

System

Platforms

- CodeMeter
  6.3 has a new version of CodeMeterRuntime: 6.50b.exe
  If you are performing a new installation, you will install this version.
  If you are upgrading, you can continue to use the existing version.

Distributed Processing Engine

- When installing a distributed processing engine, a firewall inbound rule to open port 34098 is configured to facilitate bulk printing and creating SWF files in that environment.

KFF (Known File Filter)

The KFF architecture and features have been updated.

- The KFF Server now runs as a different service.

  In versions 5.6 through 6.2, the KFF Server ran as the AccessData Elasticsearch Windows Service.

  In 6.3 and later, the KFF Server uses the AccessData Cassandra service.

  Important: If you are upgrading from 6.2 or earlier, all KFF data must be created in or migrated into the new KFF Server.

- KFF Server Configuration Files

  There are two configuration files that configure the location of the KFF server.

  The location format and port value in those files have changed.

- Hash Manager Migration Tool

  If you are upgrading from 5.6 through 6.2, there is a new tool that lets you migrate custom KFF data to the new KFF Server on 6.3.

  Important: NIST NSRL, NDIC HashKeeper, or DHS library data from 6.2 and earlier will not be migrated when using the Migration Tool. You must re-import those using the 6.3 KFF Import Tool.

- KFF Import Utility

  This utility has been updated to use the new KFF Server.

  If you are upgrading from 5.6 - 6.2, make sure to install and use the new 6.3 version.

- NIST NSRL, NDIC HashKeeper, or DHS libraries

  To use these libraries, you must import new versions of the files using the 6.3 version of the KFF Import Utility.

  NDIC HashKeeper and DHS libraries are now downloaded from AccessData and installed as CSV files.

- Export/Import

  When you export and import KFF data, the Binary format (Entire Library) is no longer available. CSV is the only export format supported.

Geolocation

- Geolocation data is automatically installed and is no longer linked to the KFF Server.

Dashboard

- The *Case Id* is now displayed for each item in the *Details* pages (except for Litigation Holds and Active Users).

Review

Imaging

- Improvements have been added to Optical Character Recognition.

Exports and Production Sets

Smart PST

In previous versions, you had two options when producing or exporting emails:

- *New PST*
  - If the export contains a PST file, this option creates a new PST for each PST file and adds only the messages (with their attachments) that are being exported.

    This option is faster if the majority of the emails within the original PST are *not* being exported.
- *Reduced PST/NSF*
  - If the export contains a PST file, this option creates a copy of each original PST and then removes all the messages that are not being exported.

    This option is faster if the majority of the emails within the original PST *are* being exported. However, this method may take much longer to complete if the majority of the emails within a PST are *not* being exported.
  - If the export contains an NSF file, exports and productions of NSF data will export the records in an NSF format.

In 6.3, there is now a third option:

- *Smart PST*
  - If the export contains a PST file, the application will examine each PST to be exported and determine the faster method between creating a *new* or *reduced* PST. If there are multiple PSTs being exported, the best method will be determined for each PST based on whether the majority of email families will or will not be exported.
  - If the export only has NSF files and no PSTs, the *reduced* method will be used.

Searchable PDF

- When exporting rendered images, you can now select an option to *Produce Searchable PDF*.

  When this option is selected, scanned PDFs or any graphic file with typed text will be OCR'ed and then any recognized text can be searched in the rendered PDF file.

  Notes:
  - This option will increase the time to render images.
  - A searchable image is not created if a regular image was already created for the item.
  - A searchable image cannot be viewed in the Alternate File Viewer.

Australian Numbering - Export Folders Broken by the Page Count, not Document Count

- When using Australian numbering, the export folders break on the number of pages rather than the document count.

6.3 Fixed Issues

The following have been fixed in this release:

Management

User Accounts

- When using FORMS authentication (not integrated Windows authentication), if a user tries to log in with an incorrect password six times and the user account is locked, the *Is Locked* status is updated correctly. (8525)
- When using FORMS authentication (not integrated Windows authentication), if a user changes their password, they no longer get an error message. (9302)
- The Users list populates in much less time. (3131)

Processing

- You can cancel multiple processing jobs at the same time. (7180)
- When the Enable Video Conversion processing option is enabled, video files that are email attachments are processed correctly. (7535)
- The "IsUnSent" and "IsUnRead" fields are populated for loose msg emails. (6092)

Review

Case Organizer

- Case Organizer reports have correct formatting. (8070)
- Case Organizer tool tips have been improved. (8303)

Imaging and Redactions

- PDF files with special formatting can now be converted to SWF and displayed in the Standard Viewer. (8473/40596)

Bulk Print

- When bulk printing email messages with attached PDFs, the orientation of the PDF file is maintained. (2125)

Other

- The Properties panel no longer displays an error for a record with a native file. (1048025/9415)

Production and Exports Sets

- On produced records, redactions are in the correct position. (8472)
- Password protected Excel files are properly produced. (8476/43517)
- When JPG files are produced as a TIF files, they are the correct size. (8477/43637)
- Accented characters are exported and produced correctly. (7264)
- While generating Production and Export sets and switching Projects, errors are not longer displayed. (8069)

6.3 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.

- ■ 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).
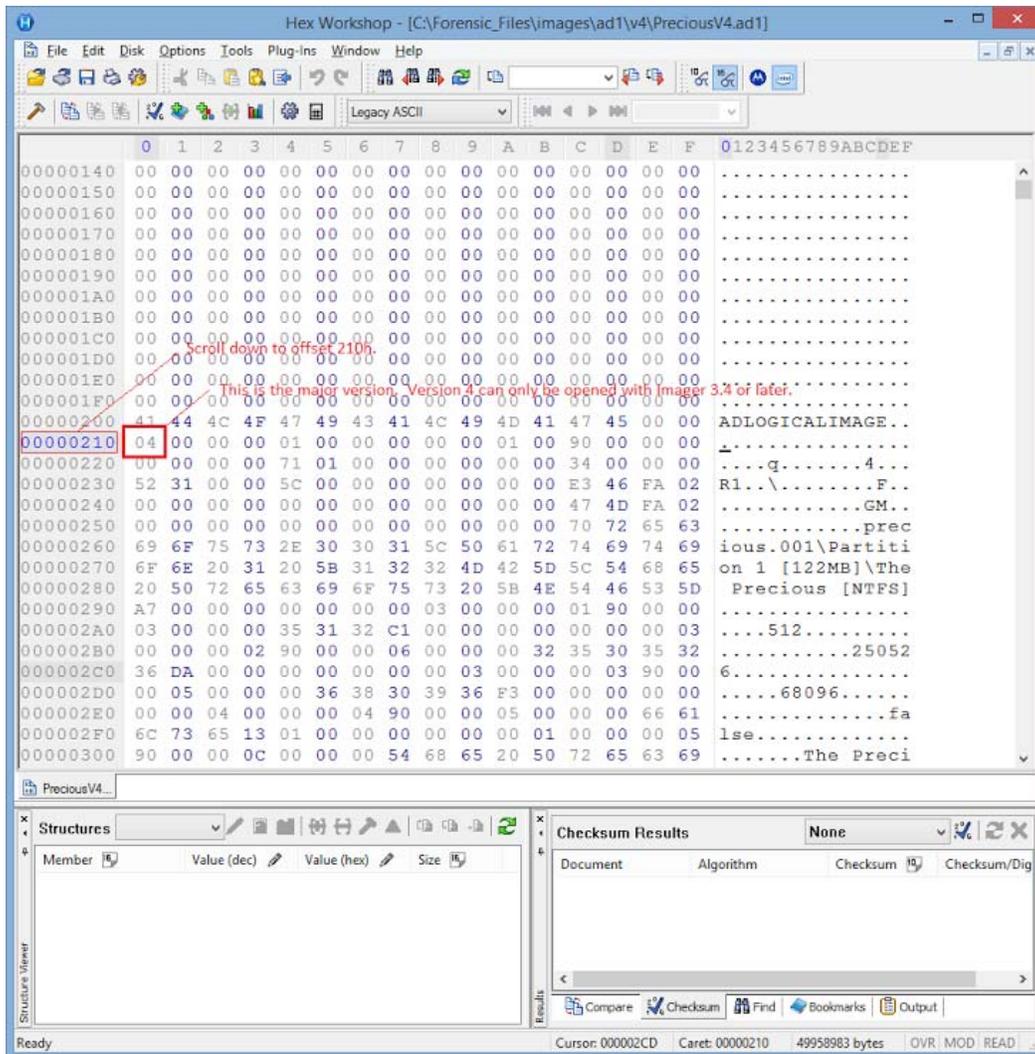
6.3 Known Issues

The following are the Known Issues for this release:

- Dashboard
  - Some columns cannot be filtered or sorted. (6955)

Comments?

We value all feedback from our customers. Please contact us at *support@accessdata.com*, or send documentation issues to *documentation@accessdata.com.*