

Summation 5.2.2 Patch 9 Release Notes

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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.”

5.2.2 Patches

The following issues have been resolved in the following patches:

5.2.2 Patch 9 Fix

- The Endattach and Attachrange tokens now populate correctly for email attachments of produced records. (21554)
- When using the Delete Evidence mass action after performing a search, the correct files are now deleted. (23201)

5.2.2 Patch 8 Fix

- Search results now clear after applying Clear Search once, instead of multiple times, to a document that had been processed with the OCR option. (16822)

5.2.2 Patch 7 Fix

- MSG and PST emails with embedded graphics now render the image correctly when processed and included as part of a production set. (17165)

5.2.2 Patch 6 Fixes

- Records that were imaged as multiple-page tiffs and then produced as single-page tiffs are now properly produced and exported as single page tiffs rather than as multiple-page tiffs. (14504)
- When copying a case that had previously had a data source deleted from it, you no longer get a “Foreign KEY constraint” error. (14326)
- When adding a PST file to a project and then updating it using a CSV Import File, some ObjectID-Hierarchy and EmailAttachment Column values are no longer lost for Family data. (13543, 14815)

- Local bulk print now works properly. (14846)
- A Production Set that was created in a version prior to 5.2.2 can now be exported in 5.2.2. (14869)
- For printed, produced, or exported documents, a Redaction Reason that was resized is no longer too large to fit in the redaction area. (15545)
- Exceptions are no longer displayed when opening a document using "Move Viewers to New Window " and then printing using a Local Bulk Print job. Documents are printed successfully with redactions and branding. (15618)
- When bulk printing documents that are sorted by a column, the documents are printed correctly. (16616, 16849)
- The *Email Senders Display Name*, *Author*, and *Custodians* facets display values properly. (17181)

5.2.2 Patch 5 Enhancements and Fixes

Enhancements

- You can now do the following:
 - Code a Produced document via the Coding Panel
 - Code one or more Produced documents via Bulk Coding
 - Label a Produced document via the Label Panel
 - Label one or more Produced documents via Bulk Labeling
 - Edit a label, custom column, or any other editable field for a Produced document via the Item List
 - Update custom columns or any other editable field for a Produced document via Global Replace
- You can now image documents that are already produced.
However, if produced documents have image annotations or no native streams, they will be skipped from imaging (9896).
- All Standard Viewer options are available for Produced records. (9934)
- Summation now remembers the last path you browsed to in order to import a load file so that when you load several load files a day, you don't have to keep entering in the path. (10287)
- Project Re-indexing Option (13607)
There is a new **Reindex Project** on the bottom-right of *Project Details* page.
(This applies if a project was created using any processing mode except *Standard No Search* or *Quick* because these two modes do not create dtSearch indexes).
When clicking the button you are warned that reindexing may take several hours and that during that time, search may return inaccurate results.

Fixes

- An "Export to CSV" job no longer fails when the *Labels* column is the last column in the Item List. (13206)
- The Production DocID no longer changes for the source record (which is a produced record). (10552)
- PDF records are now exported as multi-page files rather than as multiple single-page files. (10522)
- Produced images that are imaged as multipage TIFFs and produced again as single page tiffs are now produced as single page tiffs. (10525)
- Performance issues with re-indexing jobs have been resolved. (13420)
- Imaging jobs no longer fail because of an invalid Windows path form. (12907)
- Records are now merged correctly after frequently coding records. (12540)
- Existing *Redaction Reasons* are properly printed, produced, and exported on existing cases created with version 5.2.1. (13678)
- When converting native records to SWF for the Standard Viewer, all pages of the record are generated. (10643, 13794)

- Branding is no longer very small on some produced images when branding is selected with default fonts and sizes. (12198)
- When creating a CSV file during an AD1 export, the following error message is no longer recorded: "Error validating AD1 \\10.50.1.114\Summation\Export\5.2.2.54\1\PST.ad1: Illegal characters in path." (11396)
- When converting native records to SWF for the Standard Viewer, junk characters are no longer displayed. (10407)
- The *Production, Export, Printing* tabs no longer time out. (14194)
- After upgrading from 5.2.1, the product no longer times out during idle times when reviewing and coding documents. (13953)
- Produced Images are now displaying Reason codes in the viewer and exports for *Few Color Redactions*. (10897)
- Attachment Count field is now populated for produced records. (14079)
- Email signatures with light colors are now getting displayed when imaging. (13792)
- Emails loaded through Evidence Processing and having redactions on the native file now show when produced. (11879)
- Text-based redactions now work on produced native files. (13838)
- Processing jobs no longer fail with the following error recorded in the system log: "Could not locate job with Processing Manager". (14080)
- Production Set Field Branding no longer fails if the field is not included in the production columns. (5230)
- Redactions are placed in the correct location on produced records. (14086)
- When placing redactions on the native converted SWF file of a produced native and creating a production set including mark ups, the Produced Native record is now produced again. (13797)
- Filtered text is now generated for produced record when the source is a produced email with redactions on the native record. (13841)
- Because rotated redactions may not be placed correctly, the ability to rotate a redaction has been disabled. (14289, 14085, 14088)
- After upgrading from version 5.2.1, redactions are now displaying properly. (13679)

5.2.2 Patch 4 Fixes

- When using the email column filters *From, To, CC, and BCC*, if the email does not have a name for those values, a *No Display Name* value is used. (5698)
- The printing order for Local Bulk Printing is now the order shown in the Item Grid. (8463)
- Local Bulk Printing on Windows XP operating systems no longer occasionally crashes. (10268)

5.2.2 Patch 3 Fixes

- When the *Enable Standard Viewer* processing option is not selected, documents that are imported and that are over 1MB are no longer automatically getting converted to SWF. (12036)
- You can now cancel a production set immediately rather than only after the current stage is complete. (11650)
- When creating review sets with the *Keep Families Together* option, the correct number of documents are being created. (6019)
- Importing and imaging no longer fail on Windows Server 2012 R2. (9149)
- When installing a Summation Patch on a computer that does not IIS enabled, it no longer fails. (13750)
- Errors from dtSearch are now visible only in the System Log. (12453)

5.2.2 New and Improved Features

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

Installation

- If you have a previous database installed, you can choose to connect to that database instead of installing a new database.

Supported Platforms

Summation Express is supported on the following operating systems:

- Windows Server 2008 R2 64-bit SP1
 - Windows 7 Professional 64-bit SP1
- Summation 32-bit installers are no longer available.

Database

- AccessData now supports and distributes PostgreSQL and SQL Server Express with each new installation of Summation. This gives organizations a cost-free database solution. If your organization already has SQL Server, you can use that database for your installation.
 - PostgreSQL 9.1.13 is provided on the installation disc.
 - For new installations, PostgreSQL 9.1.13 is the default database.
 - If you have a previous version of PostgreSQL, you can upgrade to 9.1.13 but it is not required.
 - If you upgrade from 9.1.6, you must select the same installation folder and port.
 - For information about version 9.1.13, see <http://www.postgresql.org/docs/9.2/static/release-9-1-13.html>.

Home

Processing

- A new processing option, *Disable Tag Indexing*, disables the reindexing of labels, categories, and issues. With this option, the application prevents reindexing from occurring as frequently while you are reviewing data, and search counts appear correctly.

If this option is enabled, in *Review*, the text, *Tag indexing is disabled* is displayed. However, you can still search for specific tags using a field search, such as "Label contains xxx".
- There is a new processing option called *Enable Standard Viewer*, which does the following:
 - During processing, for document files (such as .TXT, .DOC, .PPT, .MSG, and so forth), a file that you can annotate and redact is generated.

This is done for files that are 1 MB or larger. For smaller files, they are generated when you select them in *Review*.

The new files are saved as SWF files.
 - When using *Review*, the default viewer is the Standard Viewer which had been renamed from the *Edit Viewer*.

The Standard Viewer displays the SWF file.

This enables you to work on a file, such as redaction, in *Review* without having to manually create the SWF file first.

This option is enabled by default.

Note: This option slows processing speeds.

Automatic Roll back

- In the event of a catastrophic failure when adding evidence through Evidence Processing, records added during the interrupted job will be rolled back and no longer be available in Review. This action of the rolling back of a job insures that you do not receive incomplete evidence items in Review. When a catastrophic event occurs, the Processing Status tab of the Work List alerts you to the error and shows that the system is attempting a roll back. Examples of catastrophic events that would trigger this action include the network going down or power outages. You need to be aware of the following considerations with the roll back option:
 - For jobs that add multiple evidence items, only the incomplete items when the job fails will be rolled back. Evidence items that have completed successfully will not be rolled back. For example, if you add evidence using a CSV import, each line of the CSV is considered a separate evidence item. In the event that the job is interrupted, any of the evidence items that have already completed successfully will remain in the project. Any of the evidence items that were in the middle of processing will be rolled back.
 - If records are locked by another process, the roll back may fail to delete physical files from the case folder. You can view what files did not get removed by viewing the log found in \\<server or IP address>\Users\Public\Documents\AccessData\InsightLogs\Summation.
 - Roll back only occurs with failure during Evidence Processing jobs, not Import jobs.
 - Incidences, such as if an Evidence Processing job fails to advance (for example, the interface displays that the job is processing for a long time), do not trigger the roll back action.

Import

- Additional identifiers used for DocID value: When importing you must specify which field is used for the DocID value. The following values are automatically mapped to the DocID field:
 - Importing CSV:
 - DOCID, ControlID, Bates , BegDOC, BegDOC#, ProductionNumber, Identifier, BegBatesNo, ID, DocNo, BegBatesNumber, ControlNumber, BegDocID, CtrlNo
 - Importing Concordance:
 - Control Number, DOCID, BEGDOCID, BEGDOC, BEGDOC#, DOCNO, Bates, BegBatesNo, ID, ProductionNumber, Identifier, ControlNumber
- When importing a CSV or DAT load file that is missing the unique identifier used to map to the DocID file, an error message will now be displayed.
- On the Import dialog, the *Map Fields* button has been moved to make it clearer that you must map files in order to import a load file.

Project Permissions

- The *Delete Summary* permission had been renamed to *Delete Evidence*.

Review

Item List

- A new column, *HasTrackChanges*, lets you to sort and filter Word documents that have Track Changes enabled. This currently only applies to DOCX document formats.
- The *FilePath* column has been changed to display the heading *Path* in the Item List. This allows the column to display any path information, not just file paths. Searches for this value should be created by specifying **Path** instead of **FilePath**.

Natural Panel

- The document viewers on the *Natural* panel have been renamed:

- The *Edit* viewer is now called the *Standard Viewer*. This viewer lets you view files that have been generated in a format that can be annotated or redacted (SWF files).
- The *Natural View* is now called the *Alternate File Viewer*.
- A new default Processing Option, *Enable Standard Viewer*, makes the *Standard Viewer* the default viewer.

There are two exceptions:

- If a generated file that can be annotated or redacted (SWF file) does not exist, the *Alternate File Viewer* is used by default.
- SWF files are not automatically created for some file types, such as PST, ZIP, DLL, EXE, and Microsoft Excel files. If you view these types of files, the *Alternate File Viewer* is used by default.
- If you view a file in the *Standard Viewer*, and that file does not yet have a generated file that you can annotate or redact (SWF file), then the SWF file will be generated automatically. For example, SWF files are never automatically created for Excel files. If you select to view an Excel file in the *Standard Viewer*, a SWF file is created for it.
- The *Standard Viewer* loads pages of large documents much faster.
- The *Standard Viewer* has been enhanced for better support for viewing large PDFs.
- You can view a succession of large SWFs in the *Standard Viewer* without affecting performance.
- When viewing a Microsoft Word document that has Track Changes enabled, you now view the changes in the document. This currently only applies to DOCX document formats viewed in the *Standard Viewer*.

Production Panel Hyperlinks

- When a document is produced, it is automatically linked to the original from which it was produced. When looking at the original document, you can see that it has been produced.

You can navigate to the produced documents via hyperlinks in the Production panel.

- The ProductionDocID appears as a hyperlink in the Production panel. While viewing a source document highlighted in the *Item List*, you can click on the *ProductionDocID* in the *Production* panel, and the produced document opens in a new window.
- Also, if you display produced documents in the *Item List* by filtering, the *Source ID* of a produced document appears as a hyperlink in the *Production* panel. Clicking on the *Source ID* opens the source document in a new window.
- The Production Panel now displays Source Objects.

Attachment Counts

- You can now see attachment counts on imported emails in the *Natural* panel.
Emails imported using a load file, are constructed in the *Natural* panel using the metadata from the load file for a consistent Outlook type look and feel. In previous versions emails with attachments did not display that attachments existed unless the user imported these files as EDOCS. Now, when importing these files as EMAIL document types, the count of the attachments is now displayed in the *Natural Viewer*. Emails processed using evidence processing will display the attachment name rather than the attachment count.

Deleting Records

- You can now delete individual records and documents from a project that has been added by either Evidence Processing or Import. You can select any record or multiple records in Review and delete them. This will delete the record and system generated data associated with the record, such as filtered text, .DAT files, and data from the database.
 - If a record is in use by another process, some part of the record might be locked, triggering an error when you attempt to delete the record.
 - If an original document has been included in a production set, you will not be able to delete that document. This avoids issues with production sets.

- Both the *Audit Log* and the *Work List* displays what records have been deleted and which user has deleted the record.
- You can now use the Delete action in the *Item List* to delete all filtered files without having to select the files individually.

Note: You cannot delete an individual record that is part of a production set. However, you can delete a complete production set.

Facets

- You can now exclude *Tags* filters (categories, issues, and labels) from a facet search. This allows you to further narrow and refine your facet scope. The default for the *Tags* facet now displays checked or included. Selecting the check box once actively excludes the facet in the *Tags* filters. Selecting the check box a second time clears the check box and the facet is not included in the facet search.

When excluded, a red **x** appears in the facet check box, indicating that the facet is excluded. The hyperlink to apply the excluded facet is disabled. You need to be aware of the following considerations when excluding *Tags* facets:

- For labels, the exclude feature applies to all labels in a group. However, if there are children under the labels, and one child label is selected for exclusion while another is not, the label group appears blank. This is because you cannot include a whole label group when one of the child labels is excluded.
- For issues, you can exclude or include an individual issue. Additionally, you can exclude a child issue while including a parent issue or vice versa.
- If you have a document that has been assigned a tagged item that is included in a facet in the *Tags* filter and has also been assigned a tagged item that is excluded in a facet in the *Tags* filter, the facet does not display the document. For example, a document may be tagged with both Tag 1 and Tag 2. If all documents with Tag 1 are included in the facet and all documents with Tag 2 are excluded in the facet, the document with both Tag 1 and Tag 2 is not posted to the *Item List*. The exclusion takes precedence. This is because exclusions and inclusions in facets act as an AND property, not as an OR property.

Imaging

- You can now view scanned PDFs that have been converted to a SWF file without a loss of image quality.

Export/Production Sets

- You can now export an export/production set to a Browser Briefcase format. This is an HTML format that provides links to the native documents, images, and text files. Browser Briefcase format has been improved from the Browser Briefcase format for iBlaze. You can now:
 - Have multiple links for image, native, and text documents.
 - Work with production sets exported previously in iBlaze Browser Briefcase format. This allows you to have greater control over the production set.

Redactions

- You can change the color block for redacting documents to any color.
- If the redaction block color is a darker shade such as black or navy blue, the redaction reason will be set to white. If the redaction color block is a lighter color such as yellow or white, the redaction reason will be set to black.

Bulk Printing

- You can now print highlights and redactions on printed documents without needing to create a production set. In the *Bulk Printing* dialog, you can select which type of markup sets to print.

Note: For documents that contain both Native and Image redactions, only Image redactions print. Image redactions take precedence over Native redactions.

5.2.2 Fixed Issues

The following issues have been resolved for this release:

Summation Express

- Fixed an issue where installation of Summation Express would stall when deployed on a Windows 2008 Server. (7762)
- The Summation Express installer no longer installs SQL Express if a SQL Server or SQL Express 2008/2012 is already installed. (7765)

System

Database

- The PostgreSQL database now displays the correct project size for all projects. (7266)

Copy Case

- Copy Case was not released with version 5.2.2, however, you can use a previous version of Copy Case with 5.2.2. (5803)

Home

Clone Case

- When using the 'Clone Case' and choosing the 'Groups' option, the operation no longer fails. (5441)

Import

- If you perform an import and include an invalid date, the import no longer fails, but completes and an error is reported in the log. (8538)
- Processes running at the end of an import load file job no longer cause an issue. (9646)

Processing

- Deduplication information now is available against running a Cluster Analysis job. (1484)
- The timeout during indexing has been increased from one minute to 30 minutes, improving the application's performance. (8213)
- PST emails now display in the Item List and Viewer after cluster analysis has been run on a project. (1640)
- Submitting a second Evidence Processing Job after submitting the first Evidence Processing Job no longer causes the Similar panel in Review to appear blank. Also, the Email in Cluster field in the Conversation panel is displayed. (2827)
- The status of jobs has been improved to more accurately reflect the current status. (7321, 7693)
- Family Relations are properly maintained for documents expanded from an attachment, such as a ZIP file. (7499)
- If an Evidence Processing job completes with an item in the job failing to process, the Processing Status displays as "Failed." (9147)
- Index processing restarts automatically and the reindexing job finishes if the ADIndexer and/or Work Manager stops. (8165)
- Custom slipsheets now get applied and the default slipsheet is applied when a source record has an image associated with it. (9888)

Users

- A large number of projects listed no longer causes issues with users logged in with various permissions. (7812)

Reports

- The Deduplication Report contains the correct data in the Object ID Duplicates column. (7462)

Review

Item List

- The orange color indicating that a column filter has been selected is now retained after the Item List has been refreshed. (34308,1902)

Standard Viewer

- The Standard Viewer displays highlights consistently in the viewer. (1745)
- Fixed an issue that occurred where on occasion, the Standard Viewer would cease functioning in later versions of Internet Explorer. (7754)
- The search highlight color was changed for greater visibility in the Standard Viewer. (11206)

Panels

- The Conversation Panel now displays properly for imported emails. The email count, email in cluster, attachment counts, and hierarchy of emails/conversations display properly. (1689)
- Read Receipts now display properly. (8359)
- In the Conversation panel, attachments are now listed with hyperlinks. You can click on a hyperlink and open the attachment in a new window. (8780)

Imaging/Production Sets/Exports

- Records are produced correctly when the source record is a native PDF and is exported as a Single Page TIFF or PDF. (2091)
- If producing images in a multi-page format, you will now get the correct image format instead of a slipsheet. (1590)
- If a single page tiff image has redactions and you choose to produce "JPEGs" for the extensions of the source native record, the production set now has redacted images in JPEG format as expected. (3742)
- Fixed the issue where the export load file contains @EDOC tokens for some records in production sets that did not contain any native files.. (33700,1572)
- Exporting using the Reduced PST option for emails is now reducing the PST file. (34609, 1574)
- AD1 exports with large PSTs no longer hang. (6260)
- The last page of an imaged multipage document now loads in the Standard Viewer. (1740)
- Branding no longer wraps on two lines for low resolution images. (5081)
- When producing or exporting emails contained within a PST or NSF using the option "Output messages as individual HTML/RTF files," MSG files now export properly in RTF format if they are not HTML formatted. (3778)
- The size of the redacted text on a produced image is no longer an issue and the full redaction reason is visible. (32143, 1577)
- When doing an export set and selecting the output as PST, the PST is created correctly. (1574)
- The DocTitle field populates correctly in load files. (6068)
- Fixed an error that caused large production sets to fail. (7816)
- Document imaging is no longer failing for PDFs and PST-based documents. (7841)
- Exported large PST files no longer fails. (8057)

- Black boxes are no longer branded onto multiple-page TIFFs. (5159)
- Email metadata fields such as TO, FROM, CC, BCC now export properly with the Production export. (6480, 9785)
- Fixed an issue that caused file validation errors in an AD1 export. (5620)
- Records no longer appear on load files without the proper DocID and requested field information. (5178)
- For export sets created with the *Exclude Extensions* options, a slipsheet page is now produced for the entire document. (6929)
- You can now create a native image of XLS documents without issue. (9806)
- Concordance and/or Relativity .DAT files generated during export now can be loaded back into Summation without error. (8065)
- When an export set is renamed, the new name is now reflected in the export set history tab. (9441)
- Files under a folder are now listed correctly in the *Native/Load Export Set Wizard* when you browse the **Slipsheet** section of the *Files to Include* selection. (9479)
- An export in progress now displays the correct “Elapsed Time” value. (8470)
- The BEGATTACH and ENDATTACH tokens in export load files are now correct when emails have nested emails with zip attachments. (10973)
- After renaming a production set from within Review, the Production Set History displays the current name. (5177)

Redactions and Highlights

- When using Draw Redaction, in some cases, text that is very close to the Drawn Redaction box is included in the redaction. (14709)
- Redactions no longer have extra characters that appear in the filtered text panel. (3767)
- The redaction reason is now visible with text-based redactions. (6959)
- Redactions on PDF files that auto-rotate are now correctly applied when the record is produced. (7265)
- Highlights now display when navigating between documents with the *Highlight Profile* on. (6185, 8118)
- When loaded as natives via evidence processing, native redactions now print for the extensions JPG, PNG, and TIFF. (9616)
- The redactions on an image TIFF production are no longer shifted. (2211)

Branding

- The size of branding when using default fonts and sizes is no longer very small on some document types. (12198)

The font size options provided for branding images allows Summation to calculate the size of the brand on the resulting image. While the font is provided to you in the user interface as a point size much like a standard document creation tool, it is actually used as a guide to determine the percentage of the page that will be used to create the brand. Therefore a choice of an 8 pt font, will not result in a branded text of exactly 8 points. The brand will be a percentage of the page that is close to an 8 pt font. Exceptions to this would be where the chosen font size is too small to be readable. In these cases, a brand less than 30% of the total page size will not be generated.

Reports

- Evaluation copy text no longer displays in Transcript Reports that are exported to a PDF file. (7421)
- The file deduplication report has been enabled. (1602)

Searching

- You now get enhanced search results on a PDF scanned doc that contains OCR text. (6152)
- A Windows popup no longer displays after executing a search and highlights of the search results appear correctly. (2057)

- Search terms now highlight when searching extracted text from a PDF. (5942)
- Search reports now accurately reflect the results from specific searches. (2873)
- Errors from dtSearch are visible in a message window. (8100, 6346)
- ZIP attachments in NSF Archives properly associate with their family. (5774)
- @ParentDOCID is included in the export DII file when source records are loaded via import (4115)
- Exception errors are no longer generated after running a subset search. (3656)

Bulk Print

- Pages are not skipped if there was an error during imaging. (7318)
- Print jobs cancelled before the Print Utility is launched now no longer display as running in the Printer status. (7324)
- After saving a redaction with a reason and then changing the redaction, when performing a local Bulk Print, the latest redaction reason is now used. (11119)

Coding

- An error no longer occurs when navigating to the next document in a group after applying a coding value. (11142)

Other

- Loading EP or importing data no longer generates a “Processing Job IDs” error in the System Log. (31099)(1531)(7743)
- Fixed an issue where performing Bulk Label, Delete Summaries, or Bulk Coding would cause a foreign key violation error. (8572)

KFF

- KFF replication jobs no longer appear in the Jobs list. (3792)

Things to Know

Installation

- This is a patch release. You must have 5.2.1 currently installed.

Evidence Processing

- Expanding and processing image files (such as an AD1) that are nested within another image file is not supported. (8127)

5.2.2 Known Issues

The following are known issues for this release:

Review

Item List

- Column filters do not return results for email address values that lack a display name. (5698)

Imaging/Export/Production Sets

- Produced images with color redactions are not displaying the Reason codes in the viewer. (10897)
- When performing a bulk imaging for TIFF, some files are not being imaged. The files image properly when done individually. (11405)
- If you label emails where there is a “display name” and then create a production set, the display name includes the email address as well. (10162)
- When exporting, the DocType field in the DII file does not get populated for emails and parent emails. (8086)
- After creating a production set with native files and images, and selecting the PST option for emails, when loading the DII back into Summation, the image files are loaded but not the native files. (10058)
- The Redaction Reasons are not displayed in the viewer for produced records. (1588)

Transcripts

- Moving quickly through transcripts causes the Web console to crash. (7755)

Bulk Printing

- Bulk printing TIFF images may be very slow and fail after a few documents. (7610)

Branding

- The watermark branding is very small on some images when produced as single page and as multipage TIFFs and PDFs. (13673)

Comments?

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