



# SUMMATION PRO

# INSTALLATION AND UPGRADE GUIDE

MULTI-SERVER

VERSION 5.6

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## PRE-INSTALLATION CONFIGURATION

### SERVICE ACCOUNT

The AccessData Summation Pro solution requires the use of a single, preferably dedicated, Windows account to operate properly. This account is the “Service Account”.

In a multi-server installation environment, a domain-level Service Account is required. AccessData will only support Workgroup authentication in single-server installation environments. In either case, the Service Account must be a local administrator on each of the servers hosting components with both “Logon as Service” and “Interactive Logon” system permissions.

AccessData recommends configuring the password of the Service Account to never expire and to not allow modification. Changing the password of the Service Account after installation will require the reinstallation of some components.

The SQL Instance hosting the SQL Database component must have the Service Account added to the Logins and provided sysadmin rights.

### FIREWALL

[DISABLE COMPLETELY OR CREATE RULES]

Run the following command from the Windows Command Prompt with Admin rights to disable the firewall completely on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> netsh advfirewall set allprofiles state off
```

### USER ACCESS CONTROL

Run the following command from the Windows Command Prompt with Admin rights to set User Access Control to “Never Notify” on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> %windir%\System32\reg.exe ADD  
HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System /v  
EnableLUA /t REG_DWORD /d 0 /f
```

**NOTE:** THIS MODIFICATION REQUIRES A REBOOT TO TAKE EFFECT.

### INTERNET EXPLORER ENHANCED SECURITY CONFIGURATION

Disable Internet Explorer Enhanced Security Configuration using the article [linked here](#).

### IPV6

Summation Pro solution does not use IPv6 for communication and AccessData recommends disabling IPv6 if it is not otherwise required.

Run the following command from the Windows Command Prompt with Admin rights to disable IPv6 on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> REG ADD "HKLM\System\CurrentControlSet\Services\TCPv6\Parameters"  
    /v "DisabledComponents" /t REG_DWORD /d 4294967295 /f
```

**NOTE:** THIS MODIFICATION REQUIRES A REBOOT TO TAKE EFFECT.

## ANTI-VIRUS SOFTWARE

AccessData strongly recommends that any anti-virus or anti-malware software on any each server hosting components of the AccessData Summation Pro solution are configured to disable on-access scanning of the directories or drives containing case files, database files, or temp/log files. Additionally, should any full scans be scheduled, they should be monitored to ensure they are not interfering with the overall performance of the solution.

SQL Information: <http://support.microsoft.com/kb/309422>

## WINDOWS OPTIMIZATIONS

For Microsoft Windows operating system optimizations please use the article [linked here](#).

## SQL INSTALLATION

### MICROSOFT SQL SERVER

To install Microsoft SQL server 2008 R2, please use the article [linked here](#).

To install Microsoft SQL server 2012, please use the article [linked here](#).

### NAMED PIPES PROTOCOL

To enable Named Pipes protocol, please use the article [linked here](#).

### MSDTC

To configure Microsoft Distributed Transaction Coordinator (MSDTC) correctly, please use the article [linked here](#).

## LICENSE INSTALLATION

### CODEMETER

To install CodeMeter, please see the article [linked here](#).

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## VIRTUAL DONGLES

Both online and offline instructions for virtual dongle installations are [linked here](#).

## LICENSE MANAGER

To install License Manager, please see the article [linked here](#).

## COMPONENT INSTALLATION

### DATABASE CONFIGURATION TOOL

Install the Database Configuration Tool on the server that will be hosting the WCF component.

To install the Database Configuration Tool:

1. Run the Database Configuration Tool executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Select MSSQL database connection and click **Next**.
5. Adjust the destination folder if necessary and click **Next**.
6. **MSSQL ONLY:** Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.

**NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME, PORT**

**INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.

7. Wait for the Database Configuration Tool to install and click **Finish** to close the Install Wizard.
8. The Database Configuration Tool should have opened automatically. Click **Add Configuration**.
9. Choose the appropriate Database Type, enter the Server Name, and check Create Database.

**NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME:PORT**

**INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.

10. Choose the authentication mode the Database Configuration Tool will use to create the ADG database and enter the credentials (if necessary).
11. Enter the credentials you wish to use to create the Application Administrator account and click **Create**.

NOTE: THESE CREDENTIALS WILL BE CAPABLE OF LOGGING INTO THE APPLICATION. IF YOU PLAN TO USE INTEGRATED WINDOWS AUTHENTICATION, IT IS RECOMMENDED THAT YOU CREATE THE APPLICATION ADMINSTRATOR USING THE SERVICE ACCOUNT'S CREDENTIALS.

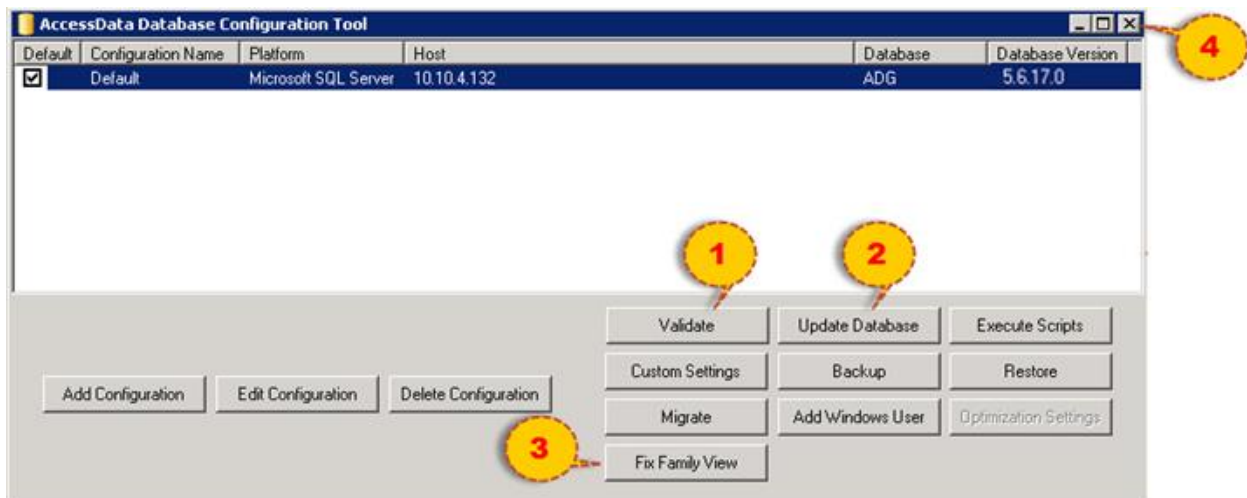
12. Wait for the Database Configuration Tool to create the database, confirm that the **Default** checkbox is checked and the **Database Version** displays "5.10.11.0."

**NOTE:** WHEN UPGRADING, PROCEED TO THE NEXT SECTION "UPDATING THE DATABASE SHEMA. FOR NEW INSTALLS, CLOSE THE DATABASE CONFIGURATION TOOL AND PROCEED TO "APPLICATION DATABASE" SECTION.

## UPDATING THE DATABASE SCHEMA

This section is only necessary for upgrading existing Summation Pro installations to the current version. For new installs, please proceed to the "Application Database" section. Before Upgrading the existing database schemas to the current version, it is strongly recommended that full backups be taken. This can be done using the **Backup** button in the Database Configuration Tool or through SQL Server.

1. If the Database Configuration tool is closed, navigate to **C:\Program Files\AccessData\DBConfigTool** and open **DBConfig.exe** as administrator.



2. Validate the current database by clicking **Validate**.
3. Select all checkboxes in the upper-most section, select the Authentication Mode for your database and enter the credentials (if necessary), and click **Validate**.

**Validate Database**

- ClearEmptyDatabases
- FixSequences
- RebuildMissingIndexes
- FailAllHungJobs
- ValidatePermissionsAndVersions
- RemoveAbandonedObjectData
- ApplyAddendums
- FixFTKFilterMRUdefaultDates

Evidence Database, e.g. ADG

Authentication Mode:

System User:

System Password:

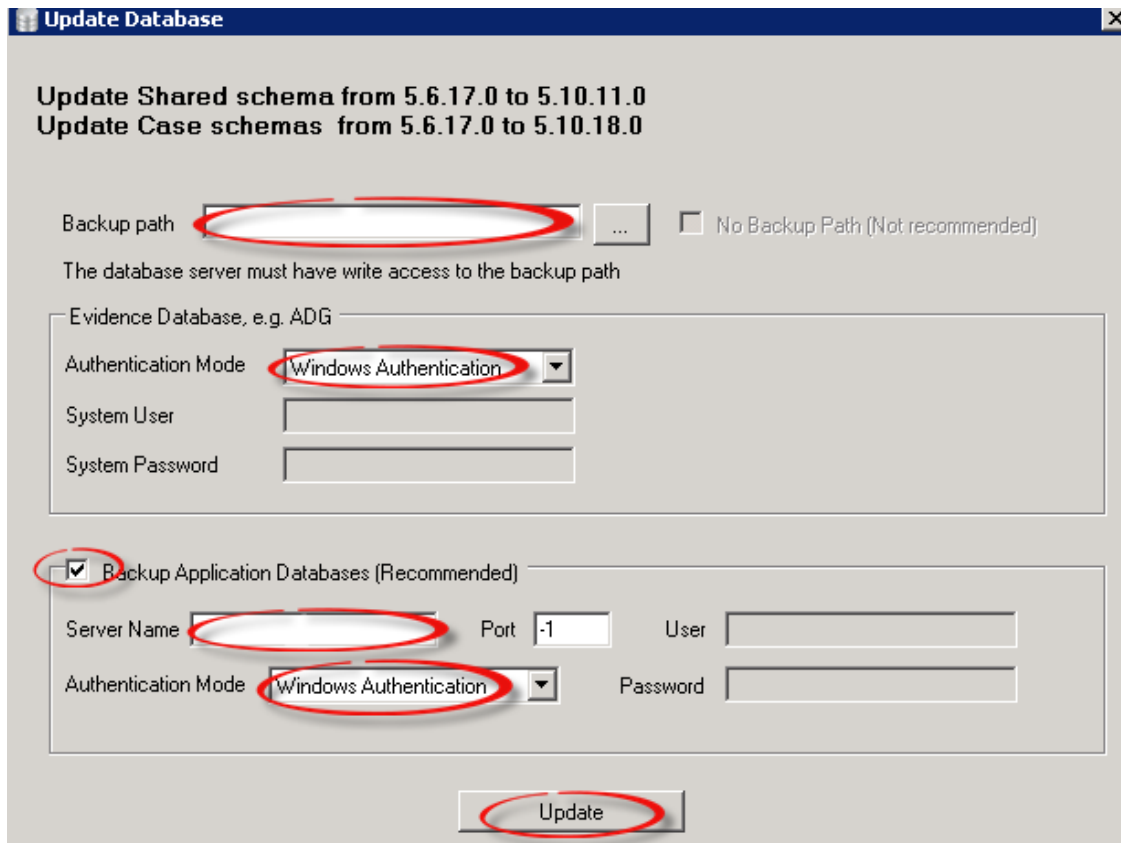
Application Databases, e.g. Ediscovery

Server Name:  Port:  User:

Authentication Mode:  Password:

**NOTE:** MORE INFORMATION ON EACH OF THE OPTIONS IS [linked here](#).

- Once the validate is complete, click the **Update Database** button.
- Fill in the following sections:



- a. **Backup path** –UNC path that database server must have write access to backup path. This feature will create a SQL Backup (.BAK) of all your cases and ADG database. (Recommended).
  - b. **Authentication Mode** – Choose between Database Server Authentication or Windows Authentication.
  - c. **Backup Application Database (Recommended)** - Creates SQL Backup (.Bak) for the Application Databases (eDiscovery, WorkFlow, WorkFlow40, Infrastructure). You can also choose a different type of Authentication for backing up the Application Databases.
6. Click **Update**.
  7. When the update is complete, click **Fix Family View**. This will repair any known issues necessary.

## APPLICATION DATABASE

Run the Application Database Installer on the server that hosts the Database Configuration Tool.

To install the Application Database:

1. Run the Application Database Installer executable as an Administrator. The Application Database Install Wizard will appear. Click **Next**.
2. Review and accept the License agreement and click **Next**.



3. Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.

**NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME, PORT**

**INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.

4. Click **Install**, wait for the Application Database Installer to complete the installation, and click **Finish** to close the Install Wizard.
5. Open Windows Explorer and navigate to **C:\ProgramData\AccessData\**. Open the most recent UpgradeAppDBLog.txt file and confirm that there were no errors reported.

## EVIDENCE PROCESSING ENGINE

The Local Processing Engine should be used whenever both the WCF Services (including Async and Work Manager) and the Processing Engine are being hosted on the same server. If dedicated servers are being used to distribute processing, the Distributed Processing Manager should be installed on the same server as WCF Services and Distributed Processing Engines should be installed on the dedicated processing servers.

### LOCAL PROCESSING ENGINE

To install a Local Processing Engine:

1. Run the Evidence Processing Engine executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Set the **Processing Temporary Folder** to point to the **ADTEMP** folder, set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.
6. Click **Install**, wait for the Evidence Processing Engine installer to complete, and click **Finish** to close the Install Wizard.

### DISTRIBUTED PROCESSING MANAGER

To install a Distributed Processing Manager:

1. Run the Distributed Processing Manager executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.

2. Wait for the prerequisites to install. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.
6. Enter the credentials for the service account and click **Next**.
7. Click **Install**, wait for the Distributed Processing Manager installer to complete, and click **Finish** to close the Install Wizard and open the Distributed Processing Manager Configuration.
8. Enter the IP address and click Add for each Distributed Processing Engine server.
9. Click **Done**. The service may take a few minutes to restart before the window closes.

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## DISTRIBUTED PROCESSING ENGINE

To install a Distributed Processing Engine:

1. Run the Evidence Processing Engine executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary, select the **Install as a distributed processing engine** option and click **Next**.
5. Set the **Processing Temporary Folder** to point to the **ADTEMP** folder, set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.
6. Click **Install**, wait for the Evidence Processing Engine installer to complete, and click **Finish** to close the Install Wizard.

## MAP

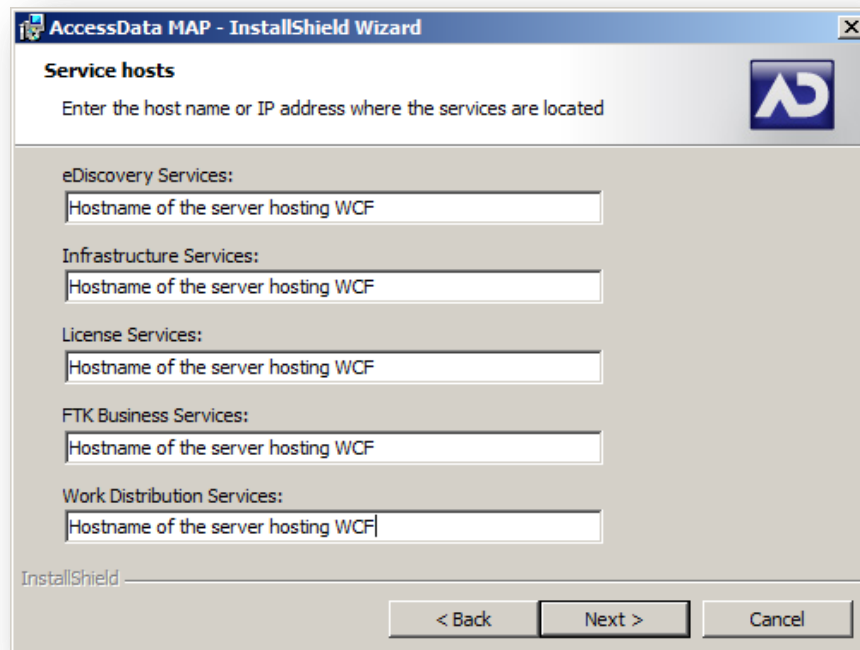
**Integrated Windows Authentication** – Summation Pro will not prompt the user for a username and password. The web browser, through a cryptographic exchange, supplies the Windows user's information and authenticates against Active Directory. If the authentication exchange initially fails to identify the user, the web browser will prompt the user for a Windows account username and password.

**Forms Authentication** – Summation Pro will prompt the user for a username and password.

**Forms with Windows Authentication (Recommended)** – Summation Pro will prompt for a username and password and authenticate the provided credentials using an Active Directory or LDAP server. This must be configured in the application before authentication can be performed.

To install MAP:

1. Run the MAP executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Enter the correct service host information and click **Next**.



**AccessData MAP - InstallShield Wizard**

**Service hosts**

Enter the host name or IP address where the services are located

eDiscovery Services:  
Hostname of the server hosting WCF

Infrastructure Services:  
Hostname of the server hosting WCF

License Services:  
Hostname of the server hosting WCF

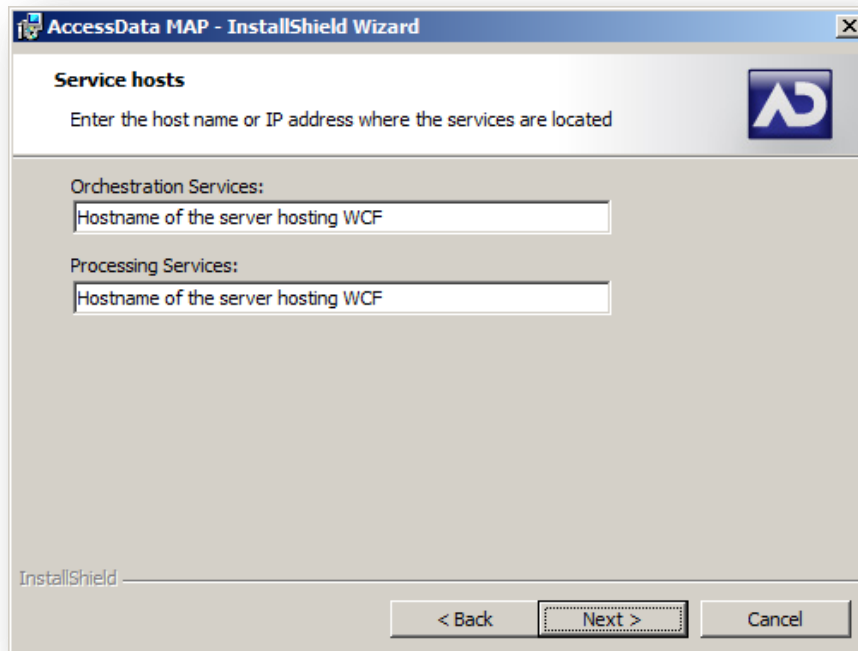
FTK Business Services:  
Hostname of the server hosting WCF

Work Distribution Services:  
Hostname of the server hosting WCF

InstallShield

< Back   Next >   Cancel

6. Enter the correct service host information and click **Next**.



**NOTE:** WHEN INSTALLING MAP TO THE SAME SERVER AS WCF, PROCESSING SERVICES MUST BE SET TO **LOCALHOST**.

7. Enter the **User Name**, **Domain**, and **Password** of the Service Account, select the **Authentication Type** that will be used to log into Summation Pro, and click **Next**.
8. Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.

**NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME, PORT**

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9. Click **Install**, wait for the MAP installer to complete, and click **Finish** to close the Install Wizard.

## WCF SERVICES

To install WCF Services:

1. Run the WCF Services executable as an Administrator. The Install Prerequisites page will appear. Click **Install**.

2. Wait for the prerequisites to install. An alert message may appear if the server has a pending restart. Reboot the server before continuing the installation. The WCF Services Install Wizard will resume its progress automatically following the reboot.

**NOTE:** ATTEMPTING TO FORCE INSTALLATION WITH A PENDING RESTART CAN CAUSE SERIOUS AND SUBSTANTIAL DAMAGE THE OPERATING SYSTEM.

3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Choose Complete and click **Next**
6. Enter the **User Name**, **Domain**, and **Password** of the Service Account. Click **Next**.
7. Enter the URL of the Known File Filter service.

**NOTE:** IF THE WCF SERVICES ARE INSTALLED ON A SERVER OTHER THAN THE SERVER HOSTING THE KFF SERVICE, THE URL CANNOT USE **LOCALHOST**.

8. Set **Use Certificates for SiteServer/Agent** to **No**, clear the **Network port used to communicate with SiteServer** and **Host name used to communicate with SiteServer** fields, and click **Next**.
9. Uncheck the **Allow Collection Type Work Orders** and **Allow Site Server Work Orders** options and click **Next**.
10. Enter the correct service host information and click **Next**.

**Service hosts**  
Enter the host name or IP address where the services are located

eDiscovery Services:  
Hostname of the server hosting WCF

Work Distribution Services:  
Hostname of the server hosting WCF

Orchestration Services:  
Hostname of the server hosting WCF

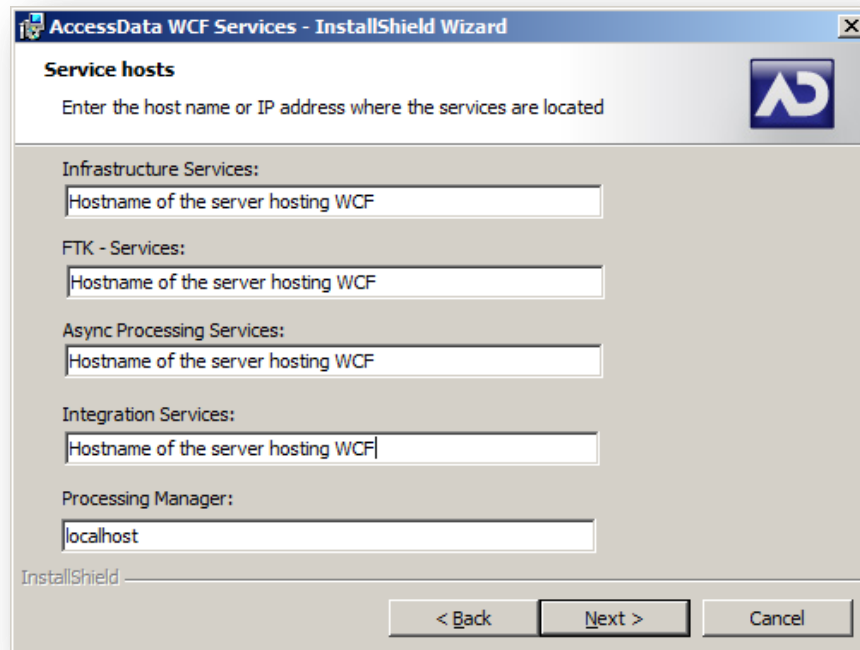
License Services:  
Hostname of the server hosting WCF

PSS Atlas Sync Services:  
Hostname of the server hosting WCF

InstallShield

< Back    Next >    Cancel

11. Enter the correct service host information and click Next.



**NOTE:** PROCESSING MANAGER MUST BE SET TO **LOCALHOST**.

12. MSSQL ONLY: Enter the database server information, ensure **Use Integrated Security** is unchecked, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.

**NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME, PORT**

**INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.

13. Click **Install**, wait for the WCF Services installer to complete, and click **Finish** to close the Install Wizard.
14. A reboot dialog will appear. Click **OK** to reboot the server.

## POST INSTALLATION

### BASIC ACCEPTANCE TESTING

1. Confirm the function of the Async app pools:

- a. Open Internet Explorer on the server hosting Async.
  - b. Navigate to <http://localhost/AccessDataGroup/Router.svc>.
  - c. Navigate to <http://localhost/AsyncProcessingServices/Import.svc>.
2. Log in to Summation Pro with the Super Admin account.
3. Check the System Log for errors.
4. Set the default project paths.
5. Create a new project.
6. Create a custom checkbox field.
7. Ingest evidence into the project.
8. Import a DII load file into the project.
9. Create a label.
10. Perform a quick search.
11. Bulk-label the search results.
12. Produce the labeled records.
13. Delete the project.