

# Summation 6.0 Release Notes

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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.”

## New and Improved Features

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

### System

#### Services

- The following services have been consolidated into the single *eDiscovery Services*:
  - *Infrastructure Services*
  - *Work Distribution Services*
  - *License Services*

**Important!** When installing or upgrading, you must configure the correct installation location of services. See [Consolidated Services and Installation Settings](#) on page 7.

#### Installation

- All installation files have been signed with a time stamp and SHA-256.

#### Agent

- **New Agent Certificate**  
To ensure you can continue to integrate with third-party applications, a new agent certificate will be issued to all clients current on their subscription.

## Management

### Multi-Tenant Environment

You can now create a multi-tenant environment that provides a private segment for each tenet. You create a private segment by creating a new user role called a Sub-Administrator. Each Sub-Administrator has limited administrative rights that lets them create users, user groups, and projects in their own segmented environment. The users in a given environment can only see the users, projects, and data contained in their environment.

You can allow individuals to create their own Sub-Administrator accounts making setup very simple.

In the Users tab, you can use columns to easily see which users are Sub-Administrators and which users were created by Sub-Administrators.

### LawDrop™

The new LawDrop™ feature provides Dropbox™ like capabilities for users to upload, organize, and share case data into a sharable platform using simple drag-and-drop functionality.

### Active Directory Sync Options

- When configuring Active Directory sync settings, you can now select which types of objects to include or not include: Users, Groups, Computers, or Shares.

## Project Management

### Processing Options

The following processing options have been changed:

- The video Enable Video Conversion and Generate Thumbnails options are enabled by default.
- The Geolocation option is now disabled by default.
- All Entity Extraction options are enabled by default.

### Processing

- Support for Outlook for Mac (OLM) files

Processing will now detect and enumerate exported Outlook for Mac (OLM) data files.

- Entity Extraction

Enhancements have been made to more accurately recognize Social Security numbers and international credit card and phone numbers.

- Maximum PDF size for SWF creation

In order to help preserve disk space, you can limit the size of native SWF files that are created during Add Evidence, Import, Imaging, and Production Sets. By default, if a file reaches 100 MB in size, the SWF creation is cancelled.

You can configure the maximum size threshold in a new setting:

"MaxPDFSizeForNativeSWFConversion"

- For SWF files created during Add Evidence and Production Sets, this setting is configured in the following config file:  
..\AccessData\Discovery\Work Manager\ Infrastructure.WorkExecutionServices.Host.exe.config
- For SWF files created during Import and Imaging jobs, this setting is configured in the following config file:  
..\AccessData\AsyncProcessingServices\ Adg.AsyncProcessing.WindowsService.exe.config

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**Note:** This setting does not affect native SWF files that created “on-the-fly” when viewing files in the Standard Viewer in Review. In this case, the SWF creation automatically times out after a minute.

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## Project List

- The values in the project *Size* column in the *Project List* are more accurate as they are now calculated using the size of the following project factors:
  - Project folder
  - Database
  - Evidence

## Review

### Panels

- Similar Panel
  - The *Similar* panel has been renamed to the *Related* panel.
  - The *Similarity to Pivot* column has been renamed to *Clustered Distance Score*.
  - There is a new *DeDeduplicate Type* column that shows if it is *Primary* or *Secondary*.
  - There is an icon that indicates whether the document is *Duplicate* or clustered data (with a % score).
  - Items that are *Duplicates* are displayed at the top of the grid.
- Notes Panel
  - Notes are now stored as part of *Case Organizer*.
  - Transcript notes will still be used so the *Notes* panel has been renamed *Transcript Notes*.

### Case Organizer

- Case organizer *Summaries* have been renamed *Bookmarks* so they are the same as FTK.
- Case Organizer Notes have been updated.
  - When you create a Note in the Standard Viewer, it is now created as part of Case Organizer in the *Comments* tab. If you upgrade from 5.x, legacy notes are still viewable in the Notes panel.
  - In the new note, there is a search icon, which if you click, the file is opened in the Standard Viewer and the text is highlighted.
- As you click on Case Organizer objects in the Item List, the Case Organizer details panel is synced.
- When you enable Quick Columns for Case Organizer, the following columns are now displayed:
  - COType
  - COStatus
  - COBeginDate
  - COImpact
  - COMaterial
  - COAssignedTo
  - People
  - List of linked ObjectIDs
- Case Organizer reports have been enhanced.
  - You can create a *Timeline* or *Object* report.
  - You can now save the report in DOCX format as well as PDF.

## Project Bar

- The project bar at the top of Review no longer includes the search bar for searching for a DocID. There are still the navigation buttons and the ObjectID link to open the file.

## Item List Views

- The Timeline and Summary Views are now hidden by default. You can have them displayed by changing a setting in the Web.Config file.

## Item List Columns

The following columns have been added:

- Microsoft Office document metadata:
  - HasEmbeddedComments (PPT files)
  - HasHiddenColumnsRows (Excel files)
  - HasHiddenWorkSheets (Excel files)
  - From file *Origin* properties:
    - LastSavedBy
    - RevisionNumber
    - CreateTime (Content created)
    - LastSavedTime (Date last saved)
    - LastPrinted
    - TotalEditingTime (Word and PPT)
  - Adobe files metadata:
    - DateCreatedMetadata
    - DateModifiedMetadata
- OcrScore  
This column provides the OCR confidence % score for each file that has been processed with OCR. This column is sortable which helps you determine which files may need to be manually reviewed for keywords.

## Item List Options

- Keep Family Together  
An object in the item list may have children items that have a much different Object ID, therefore, they may not appear together in the Item List. For example, in the Family panel, you may see an object with ObjectID 45 that has two children with ObjectIDs 546 and 547.  
In the Item List *Options*, you can turn on the *Keep Family Together* option and the following will occur:
  - In the Item List, the children objects appear under the parent object.
  - A new column, *HeadOfFamilyID* is displayed.  
For children objects, the ObjectID of the head of family item will be displayed. The Item List will also be sorted by this column.
  - While the *Keep Family Together* option is on, you can only sort by the *HeadOfFamilyID* column.  
If you need to sort by another column, uncheck the *Keep Family Together* option.

## Item List Actions

- OCR
  - Multi-Language OCR  
When you use the OCR action, there is a new option to select to OCR from one of 35 languages. You can only select one language per file.
  - Re-OCR documents  
When you use the OCR action, there is a new option to Re-OCR a document. For example, if a document has two languages, you can OCR it in one language and then re-OCR it in the other language.
- Bulk Coding
  - The default Action in the Item list is now *Bulk Coding* rather than *Add to KFF*.

## Unitization

- Instead of being able to split a document in one place to create two documents, you can now split a document in many places to create multiple documents.
- The naming of unitized files has changed so that the original file's ObjectID is referenced. The new filename is `UnitizedObject_NewObjectID_OriginalObjectID.pdf`.

## Exports and Production Sets

### Browser Briefcase

- There is a new Browser Briefcase application that lets you do the following:
  - See a grid of documents along with metadata about the files
  - View either the native SWF or the image SWF (you can switch between views)
  - Perform a text search across documents which will filter the list based on search hits
  - Perform an in-document text search
  - Open the native document
  - Add notes about each documents
  - Tag files and export the tagged files (You can import the files with notes back into Summation.)
  - You can zip up the entire export file set and then send it to someone else so they can open Browser Briefcase away from the Summation server and view the included files.
- When configuring export options for Browser Briefcase, there are two new options:
  - Export Native SWF
  - Export Image SWFThese provide SWF files that you can view in Browser Briefcase

### Production Sets

- When creating Production Sets, the following options have been added:
  - *Export Native SWF* - This option will generate native SWF files for produced objects.
  - *Export Image SWF* - This option will generate graphic SWF files for produced objects.
  - *Prepare for Browser Briefcase* - If selected, this will auto select the *Export Native SWF* and *Export Image SWF* options, and if unselected, it will unselect these 2 options.

## 6.0 Fixed Issues

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The following have been fixed in this release:

### System

- After running the Distributed Processing Manager Configuration, the Distributed Processing Manager Service properly restarts. (29037)
- Logs for components that are not used in Summation have been removed. For example, Site Server. (31646)

### Review

#### Imaging and Branding

- SWF files and Images are now created for WordPerfect WDP files. (31702)
- When producing an image and branding a PDF with comments, the comments are now viewable in the produced document. (31622)

#### Redacting

- When placing a coordinate-based redaction, and extending it to the full page, the produced PDF no longer has embedded text behind the redaction that can be copied and pasted from the PDF. (27227)

#### Other

- Summation Review no longer hangs when a user that is created in Summation is assigned a role using AD LAB. (34291)

### Exports

- When exporting with a reduced PST, and selecting Exclude Labels / Exclude File Categories / Exclude Issues for native files, the files are excluded properly. (34436)
- When exporting with a reduced PST, performance has been improved. (29703)

### Lit Hold

- From an email to an Approver, the link to *View in eDiscovery* works correctly. (32382)

### Upgrade/Migration

The following fixes have been made for migrating from iBlaze and Enterprise:

- Missing columns in the E-table no longer cause migration to fail. (26712, 28926)
- Migrated custom fields from the E-table are migrated properly and do not give false positives in searches. (2870)
- Data in the Issues column are now migrated. (30092)
- Resolved the issues that caused the following errors:
  - Duplicate RowGUID exists in database. (31129)
  - startIndex cannot be larger than length of string. (28002)
- The redaction reason is now migrated. (33066)
- Redactions on rotated images are migrated correctly. (33067)
- Illegal characters in the Doclink field no longer causes errors. (34256)

# 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, with '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 hostnames 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 6.0 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.



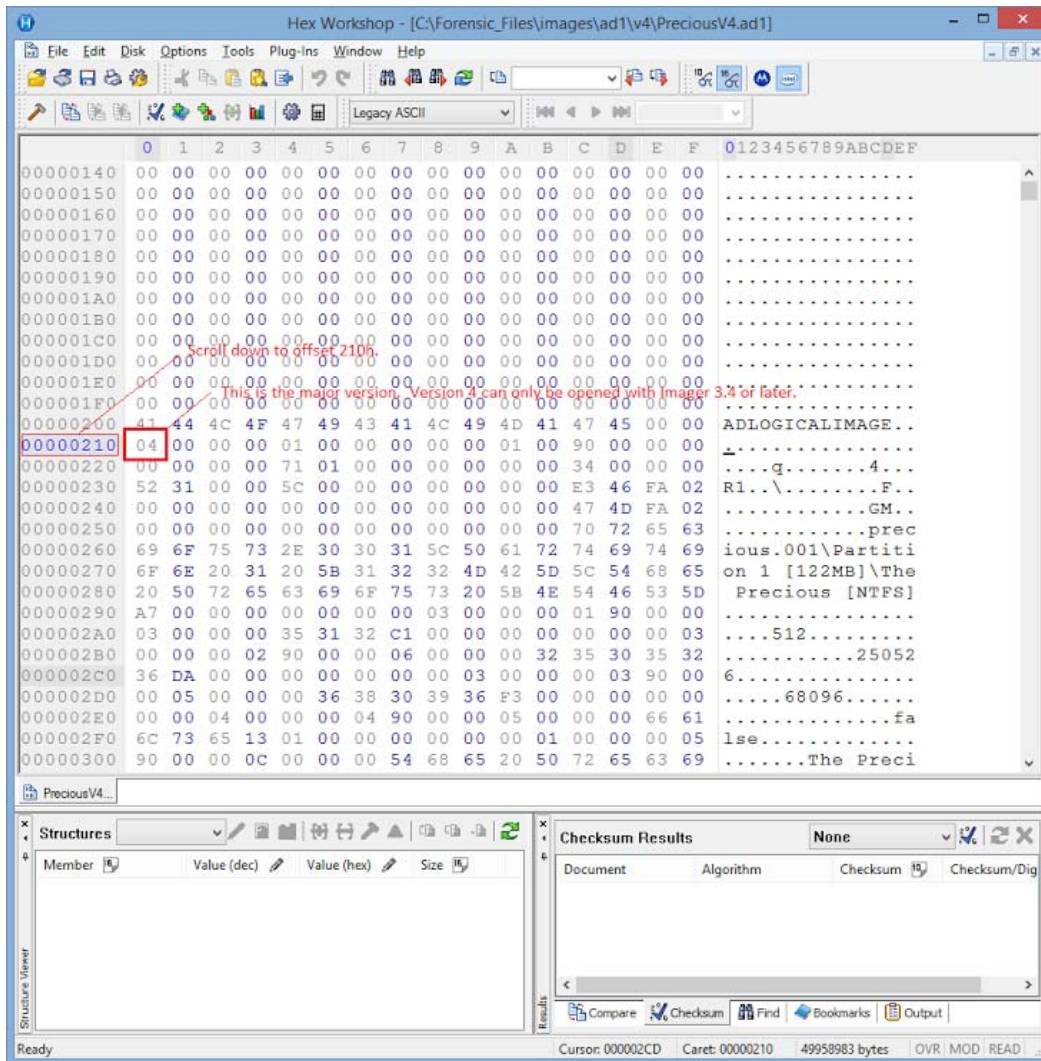
## Updated Imager and AD1 Files

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 AD1s 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).



## Comments?

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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).