eDiscovery 6.0.1 and Patches Release Notes

Document Date: 11/20/2017

Introduction

This document lists the new features, fixed issues, and important information for 6.0.1 and subsequent patches. All known issues published under previous release notes still apply until they are listed under "Fixed Issues."

For information about 6.0.1, see Summation 6.0.1 Release Notes (page 10).

For information about previous 6.0.1 patches, see 6.0.1 Patch 8 (page 3).

6.0.1 Patch 9

Document Date: 11/20/2017

Patch 9 Enhancements

Processing

- Fixed an issue that caused processing to hang on an E01 file. (10106)

Collections

- Collecting from Druva Cloud works properly. (9544)

Site Server

- When a collection job on a computer is interrupted and the job is resumed and completes, the job collects the proper files. (7370)

  Important: For this fix, you must manually uninstall Site Server and install Site Server version 6.0.4 that is included with this patch.

Important Information

Installation

- This is a patch release for eDiscovery 6.0.1 only. Before installing this patch, you must have 6.0.1 installed. This patch will not work with a previous release. If you are using a previous release, upgrade to 6.0.1 first.

- 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 clear your Internet Explorer cache before using the upgraded version's web console.

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

- If Summation or eDiscovery is installed on a computer running English Windows, but you are accessing the console from a computer running Chinese Windows, by default, the console displays in Chinese. To have the console display in English, edit the FTK business services configuration file and add the following line:

  <add key="OverrideSystemCulture" value="en-us"/>

  Once that is done, restart Business Services. This will display English strings in the console when using a Chinese environment. (38031)

Known Application Issues

Forms and Integrated Windows Authentication

- It is possible to use forms authentication, create forms users, and then change to IWA. In this scenario, if a forms user's account becomes locked, you cannot use the Unlock option on the Users page to unlock it. You must first change the system back to form authentication mode, and then you can unlock it. (38305)

Collection Job Filters

- When you create a filter using the *File Content* tab, other filters are ignored. (39798)

Search Reports

- The *Simple Search Report* currently does not work with *Synonyms* or *Related* words in *Advanced Search*. You can work around this issue by using the *Expand All* option. (41373)

6.0.1 Patch 8

Document Date: 5/11/2017

Patch 8 Enhancements

Data Sources

Share Paths

- Validating network share paths (5346, 41389, 7693)

  There are several places in the application where you can specify and validate a path to a network share.

  If a path is not valid, for example, if you have extra spaces before a backslash in the path, the path is not validated and you receive a message explaining why it is invalid.

- Validating credentials for a network share (5346, 41389, 7693)

  When configuring Network Shares as a Data Source, you can specify and validate the credentials to use to access the network work.

  - When creating a new network share, the following rules are applied:

    - If you select *New Credentials*, the new credentials it will be used.

    - If you do not specify a new credential, it will use the default credential if one was configured under *Management > System Configuration > Share Credentials*.

    - If no credentials are configured, the system will use the IIS application pool credential.

  - When editing an existing network share, the following rules are applied:

    - If you select *Existing Credentials*, it will use the existing credential associated to the share.

    - If you select *New Credentials*, the new credentials will be used.

    - If you select *No Credentials*, it will use the default credential if one was configured under *Management > System Configuration > Share Credentials*.

    - If no credentials are configured, the system will use the IIS application pool credential.

Druva

- The configured path for Druva is now an HTTP URL. (7766/34776)

- The *Job Details* report shows configured filters. (8307/42872)

- When configuring the path, a forward slash is no longer required at the end of the URL. (7768/40806)

- When configuring the path, SiteServer, exception, and internal server errors are no longer displayed. (7769,7770, 7773, 40807,40808, 41342)

- Collection jobs no longer fail or timeout when the data set has many levels of folders or many child directories. (7771,7774, 7776, 41027,41343, 41682)

- Collection jobs no longer fail when the URL contains special characters. (7772/41029)

- Collected email data from PSTs is processed correctly. (7775/41344)

- Collected data using an exclusion filter is displayed in *Review*. (7778/42212)

- *Stop Job Targets* works correctly. (7767/36019)

- The *Display Name Filters* filter have been renamed to *Display Name*. (8385)

Search

Advanced Search

- Advanced search now properly uses search expansion settings. (40881)

Simple Search Report

- A custodian name is not is not duplicated in the results. (7540)

- The *High Level Details* tab uses the Quick Filter values, such as Hide Duplicates. (7541)

- If the *Show Duplicates* Quick Filter value is enabled, duplicates are included in the report. However they are not included in the Default Search Report. (7542)

- The report generates correctly when reporting on search hits that are a subset of labeled objects. (42664/3133/7543)

- If you try to download a search report that has been deleted, you will now get a message to generate the report again. (3132/7544)

- A search for hyphenated words returns the correct hit counts. (7545)

6.0.1 Patch 7

Document Date: 11/30/2016

Patch 7 Enhancements

Logging

- When memorializing required authentication credentials for applicable systems/applications, the WCF (Windows Communication Foundations) log (only available to business server admins) will now mask all stored passwords. (43325)

6.0.1 Patch 6

Document Date: 11/30/2016

Patch 6 Enhancements

Exports

- Ringtail exports have been enhanced for Australian standards. (42494)

6.0.1 Patch 5

Document Date: 8/4/2016

Patch 5 Enhancements

The following changes have been made in search reports:

- You can force the search report to always list hits as phrases rather than individual words.
- There is a new Simple Search Report. The original report is now called the Default Search Report.

Using Phrases in the Default Search Report

- After running a search, and generating a search report, you can force the Default (legacy) Search Report to always list hits as phrases rather than individual words.

  The difference between the phrases option and the default words option is that a phrase may contain one or more words.

  For example, suppose you perform a search for "jungle ji*". If using the phrase option, the search report will return the hit counts for the entire phrase "jungle ji*", such as "jungle jim" or "jungle jill" and not for the individual words "jungle", "jim", or "jill". If using the words option, the search report will return the hit counts for each word in the phrase and each word that matches the wildcard, such as "jungle", "jim", and "jill".

  As another example, suppose you search for "(app* pie) AND (cher* pie)". The phrases option will use "app* pie" and "cher* pie". The words option will return words like "apple", "cherry", and "pie".

- By default, the option to force hits to be listed as phrases in the Default Search Report is disabled and the words option is used.

  To enable the Default Search Report to use phrases, on the computer running the MAP console, you must configure the file

  Program Files\AccessData\Map\Web.config

  and set the following default line

   <add key="SearchReportUsePhrases" value="false" />

  to *value="true"* and then restart your browser.

  Note: This option only affects the Default Search Report.

New Simple Search Report

- After running a search, you can select to create a Default Search Report or a new Simple Search Report.

  The Simple Search report is different in the following ways:

  - The report has a new template with the following new tabs:

    - High Level Details - This shows the total number of documents searched, the number of documents not matching, the number of documents matching, the number of documents and families matching, a matching %, and the size in GB of documents matching and not matching and % matching.

    - Search Term Details - This shows the number of hits by search term. In the report itself, there is a field where you can enter a date range after the report is generated.

    - Custodian Details - This shows the number of documents with hits, and documents with hits plus family, broken out by custodian.

    - File Types - This shows the number of documents with hits, broken out by file type and extension.

- The new report list search hits as phrases, rather than individual words.
  See Using Phrases in the Default Search Report on page 6.
- By default, the option to generate this new report is hidden.
  In order to expose the option, on the computer running the MAP console, you must configure the file
  Program Files\AccessData\Map\Web.config
  and set the following default line
  <add key="ShowCustomSearchReportOption" value="false" />
  to *value="true"* and then restart your browser.

Note: The ShowCustomSearchReportOption setting overrides the SearchReportUsePhrases setting. When enabled, the ShowCustomSearchReportOption will force all search reports to list hits as phrases.

After editing the web.config, when you run a search, and then click **Search Options** > **Search Report Options > Generate Search Report**, you have two options:

- **Generate Default Search Report**
- **Generate Simple Search Report**

Patch 5 Fixed Issues

Search Report

- When searching for phrases containing 3 or more words, the "Total Unique Family Items" count is correct. (38712)

6.0.1 Patch 4

Document Date: 7/7/2016

Patch 4 Enhancements

Document Groups

- Project Administrator permission is now required to *Remove Document Group Items*

  In the *Review* actions, there is an action to *Remove Document Group Items*. Previously, that action was not tied to any permission. Now, you must be a Project Administrator to use that action. (39424)

  As in previous releases, only a Project Administrator can delete and manage Document Groups. (39423)

eDiscovery Agent Support

- Running the AccessData Agent on Windows 10 is now supported.

Patch 4 Fixed Issues

Local Bulk Print Permission

- Users with the *Imaging* project-level permission can now use local bulk print. (40227)

Delete Evidence

- The *Delete Evidence* action is working correctly in the following instances: (37712)
  - Records get deleted correctly when the Parent record is selected and the *Delete Evidence* action is run with the *Include family* option.
  - The *Delete Evidence* action with the *Include family* option works correctly when an attachment is selected.
  - A Parent record does not get deleted by itself if it has child records.

6.0.1 Patch 3

Document Date: 5/13/2016

Patch 3 Fixed Issues

- Fixed an issue that could cause the *Users* page to become non-responsive after deleting a user. (39465)

- Fixed an issue that could cause a "GetCoolFormattedStreamHandler.ashx" pop-up message to be displayed in Review (39516)

- Job reports

  For a *Report Only* job, the *Job Details* report is generated correctly. (39936)

- Job filters

  Fixed the following issues when using *Collection* or *Report Only* jobs, targeting Computers or Network Shares, and using *Include* and *Exclude* filters.

  - When using the *Extensions* or *Path Contains* properties, you can select multiple items by separating them with commas.

    It is required that you not have spaces after the commas. Previously, if you inserted a space after a comma, any text after the space was ignored.

    Now, if you include a space, the system will now automatically remove the space from the property and it will work correctly. (38730, 38346)

  - When using an *Exclude* filter and using the *Path Contains* property, you must also enter a value in the *Extensions* property. Previously, if you did not specify an extension, the *Path Contains* property did not work. Now, if you leave the *Extensions* property blank, the application will automatically insert a **.*** in the *Extension* property. This will exclude all files in the specified path. You can also specify one or more extensions, and then only those files types will be excluded in the specified path. (38679)

6.0.1 Patch 2

Document Date: 4/22/2016

Patch 2 Enhancements

Installation

When applying this and future patches, the following config files are automatically backed up before the new files are installed:

- AsyncProcessingServices\
  - Adg.AsyncProcessing.WindowsServer.exe.config
- Common\FTK Business Services\
  - AdgRTTWindowsServiceHost.eve.config
- DBConfigTool\
  - DBConfig.exe.config
- Distributed Processing Manager*version*\
  - ProcessingManager.exe.config
- eDiscovery\Orchestration Services\
  - eDiscovery.OrchestrationServices.WindowsHost.exe.config
- Evidence Processing Engine*version*\
  One of the following depending on your configuration:
  - ProcessingEngine.exe.config
    or
  - ProcessingHost.exe.config

The config files are appended with a .bak and are backed up to
C:\ProgramData\AccessData\Config_Backup\6.0.1

When you apply future patches, the .bak files will be appended with (1), (2), etc.

Also, all configuration information about distributed processing engines is preserved. (39171)

Patch 2 Fixed Issues

Redaction

- Fixed an issue that caused some saved redactions to be removed from a document. (39084)

Search

- Performing a search using the Advanced Search stemming feature returns the correct hits. (38593)
- Fixed an issue that caused some search queries using multiple parenthesis to generate an error "Parenthesis do not balance". (39281)

Viewers

- Fixed an issue that sometimes caused the following when displaying emails in a viewer: (39259)
  - Some emails were blank.
  - The first letter of some email address were missing.

6.0.1 Patch 1

Patch 1 Enhancements

Indexing

- When data is processed in Summation/eDiscovery, the @ symbol is now indexed as a space character like it is in FTK/LAB. Previously it was indexed as a regular character. As an example of this change, you can now search for names in email addresses without having to use wildcards. (36047)

  This change will be in effect only for new cases created using Patch1.

Print from Standard Viewer

- You can now print the file as it appears in the *Standard Viewer*. If you have made any annotations, they will also be printed. For example, if you have added redactions to the document, they are printed. (34938)

  You can print with the following options:

  - Print All Pages
  - Print Current Page
  - Print Range

  > **Note:** This print feature can only print 50 pages at a time. If the document is larger than that, you can do one of the following: print a range of 50 pages at a time, use bulk print, or download the file and then print it.

Transcripts Notes

- In the *Transcript Viewer,* when a note is created, the dialog displays both the beginning page and line number as well as the ending page and line number. The transcript report also displays the beginning page and line number and the ending page and line number of all of the notes. (37774)

LawDrop

- Files that have been processed or imported are no longer displayed in the LawDrop project Intake folder. (35497)
- You can now delete or copy files from a project *Intake* folder that have not yet been processed or imported. (27679)

Logging in to the Console

- Logging into the console occurs faster, especially when there are a large number of projects and a slow network connection. (35189)

FTK Compatibility

- When opening a project in Summation/eDiscovery that was created and processed in FTK with FTK indexing options, you will get a warning that the project was created using an Index from FTK. In order to avoid confusion, this warning is not displayed when a user that is not an administrator opens it.

Patch 1 Fixed Issues

Jobs and Site Server

Collection

- When collecting from Domino, when using a keyword with a data range, you get the correct hits. (29589)
- Email messages collected via Domino now displayed the parent folder in message "Path" column. (31184)

- If there is a Site Server failure (for example, Permission issue: cannot write to the results directory OR cannot create a folder in the results directory) it no longer stays in an "in progress" state but will be marked as failed. (30593)
- In collections that have files with Chinese characters, the chinese characters are now shown in the collection report instead of ascii characters. (37013)
- Collection jobs complete when using the 5.3.1 Agent. (37526)

Site Server

- The site_server.txt log file gets split when it reaches 50MB in size. Previously, it would grow indefinitely and may get too large to open. (34652)
  (Requires new Site Server 6.0.2.195)

Lit Holds

- When a Lit Hold is associated to multiple custodians, a termination notification email includes a link only for the correct custodian. (35130)

Management

- "Last Login Date" correctly updates when using AD sync. (36130)

Project Management

Custom Fields

- If you delete a custom field that is in use as a column in the *Item List* by another user, the column will stay in their grid until they manually remove it as a selected column.
  In *Review*, in the *Select Columns* dialog, the deleted column will no longer be displayed in the *Available* columns list, but users will still have to manually remove it from their *Selected* column list. (29890)
- After creating custom fields using radio buttons and check boxes, applying those to files, and then exporting a CSV for those files, the radio button name and check box names are correctly displayed in the CSV. (35711)
- Comments and MatterType fields can now be filtered. (34996)

Document Groups

- When creating a Document Group, the name must be less than 50 characters. If you enter a name that is longer, you are now given a warning that you must edit the name. (32424)

Import

- Fixed an issue that caused an Import to fail if a token in the DII is too large, null, or otherwise not valid. (36516,36606)

Review

Search

- When performing an Advanced Search and using the *SourceObjectID > Contains* condition, the search no longer returns a "*Query Parser Error: Operator ObjectID is misspelt, please recheck query*" error. (15593)
- Search correctly identifies if there is filtered and/or OCR streams before using them in the concatenation. (36051)
- Fixed a problem that produced incorrect results when search included similar fields, such as CC and BCC or AMOUNT and TOTALAMOUNT. (38127)

Reports

- In a large project (multiple terabytes), the *Email deduplication report* generates properly. (28963)

Redactions

- If the original image was rotated 180 degrees, the text on redactions is no longer misplaced after production. (30028)
- When a redaction is placed on the end of the text stream, the beginning non-redacted text is no longer removed. (35413)
- Produced records no longer have white boxes drawn over non-redacted text streams. (36423)

Imaging

- When the *adtemp* folder is changed from the default value and SWF files are generated on-the-fly, they are now correctly saved to the *adtemp* folder. (30652)
- Imaging an email no longer adds the message headers to the image. (37569)

Image Panel

- When viewing the rotated image of large document (at least 20 pages), the Standard Viewer no longer skips pages. (30081)

Viewer

- When using the server's hostname in the console URL, after opening the Popout viewer, you can now re-dock it back to the main window. (30603)

Graphics

- Viewing graphic files with PCT compression is now supported. (29787)

Export, Production, and Review Sets

- When creating a *Review Set* and using the same name as the label that is used, the *Review Set* is created correctly. (31046)
- When you output a reduced version of an NSF file and it was compacted properly, there is no longer a false error that it was not properly compacted. (34556)
- JPEG images, color and black & white, are produced correctly from colored jpeg native files. (34882)
- Production set no longer pauses for an hour timeout when imaging encrypted PDF. Slipsheets are given for the encrypted PDF. (37511)   OPT file record has correct pagecount value in the last field. (37777)

eDiscovery 6.0.1 Release Notes

Document Date: 11/20/2015

Introduction

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

New and Improved Features

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

Management

Active Directory Sync

- Active Directory Update Notification

  You can now configure the system to send you an email notification when a value in Active Directory is changed and synced with Summation/eDiscovery. This can be helpful when you have a custodian in a Litigation Hold and the status of that user changes. For example, they may move locations or may no longer be employed.

  You configure the email notifications as part of the Active Directory sync setting. You can select which Active Directory fields you want to be notified about when changes occur and which application users to send an email to. The notification email contains a time stamp, the name of the user that the change occurred for, the properties that changed, and the old and new values of the changed properties.

Litigation Hold

- Lit Hold Custom Properties

  You can now define and populate custom properties for LitHolds. This can be useful in providing specific information about a given Lit Hold. For example, you may want to have information about a custodian, such as their date of hire, manager name, or employment status.

  You can use the following types of property data:

  - Text (For example, a manager's name)
  - Date (For example, a hire date)

- Choices (A list of options to select, for example Full-time and Part-Time)

You can also specify the following:

- If a property is required

- Default values

When you create a new Lit Hold, the custom fields that you have defined are displayed in the Wizard. You can use default values or enter new values.

The custom properties and their values are displayed as columns in the Lit Hold list and in the Lit Hold Details report.

Connectors

- Druva connector (30324)

The Druva connector has been enhanced with the following:

- Files greater than 4GB are now supported

- The connector path no longer requires an SSL UNC path but now uses an HTTP address

- Site Server is no longer a required component for using the Druva connector

Review

Standard Viewer

- Standard Viewer Caching

When you view an item in the Standard Viewer, it now caches the next few items in the Item List. This makes navigating to and viewing the next item much faster.

Notes:

- The number of files that is cached is based on GridCacheCount value in the Map\Web.config file. (The default is 3)

- It only caches the next items, not the previous items.

- When using the Standard Viewer, it loads the generated SWF file for the item. This new feature caches the SWF files. If SWF files do not already exist, a SWF is auto-generated on-the-fly and may take a few seconds. You can make SWF files in bulk by using the Imaging action.

Search

- Search Excerpts Report

The search excerpts report has been enhanced with a new Search Context function.

In the new Search Context tab, you can display the 1, 2, or 3 words before and after each search term hit. This lets you more easily find the results you are looking forward by seeing the search term in context with other words within each excerpt.

Columns

- OcrScore

When you OCR a document, a confidence score is now calculated that indicates how successful the OCR was. There is a new *OcrScore* column that displays the OCR confidence % score for each file that has been processed with OCR. This column is sortable and searchable which helps you determine which files may need to be manually reviewed for keywords.

The OcrScore value may be one of the following:

- 1-100 — The OCR confidence % score for a document that had a successful OCR process--the higher the score, the higher the confidence

- 0 (None) — The OCR process did not identify any text to extract

- -1 (Skipped) — The OCR process was skipped due to some condition
- -2 (Failed) — The OCR process failed for that file
- blank — The file does not need the OCR process, for example, a .DOC file or email

Note: For data that is upgraded from a previous version, if a file has been previously processed with OCR, it will show a value of 2. You can use the *OCR Documents* action in Review to re-OCR the document and you will get the new OCR confidence score.

6.0.1 Fixed Issues

The following have been fixed in this release:

System

Users

- You can delete a user account that is associated with a project that was previously deleted. (35142)
- When using Active Directory Authentication, importing users from Active Directory works properly. (35038)
- When creating a new user account, you cannot use special characters, such as an apostrophe. (35512)

Project

- After adding a group to a project, you no longer have to log out and log back in before granting permissions. (32924)

Review

Natural Viewer

- Fixed an issue that sometimes caused a SWF file to not be created correctly. (35149)

Review Sets

- Fixed an issue that sometimes caused a review set to not be displayed correctly. (35196)

LawDrop™

- Only users with Project Administrator project permissions can add evidence to project. (34901)

Important Information

General

- eDiscovery 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.
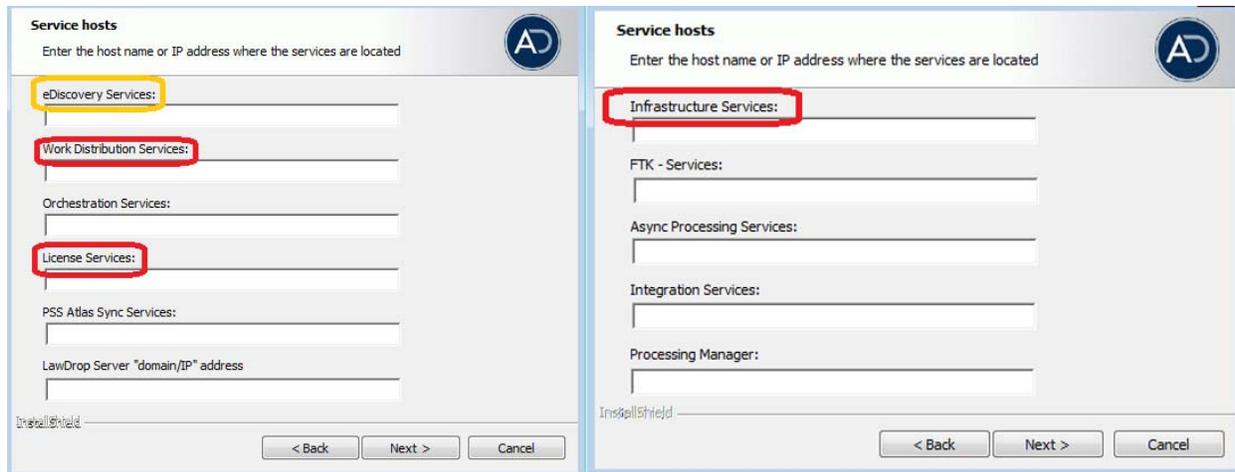
  - ▪ New 6.0 installation:

    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).
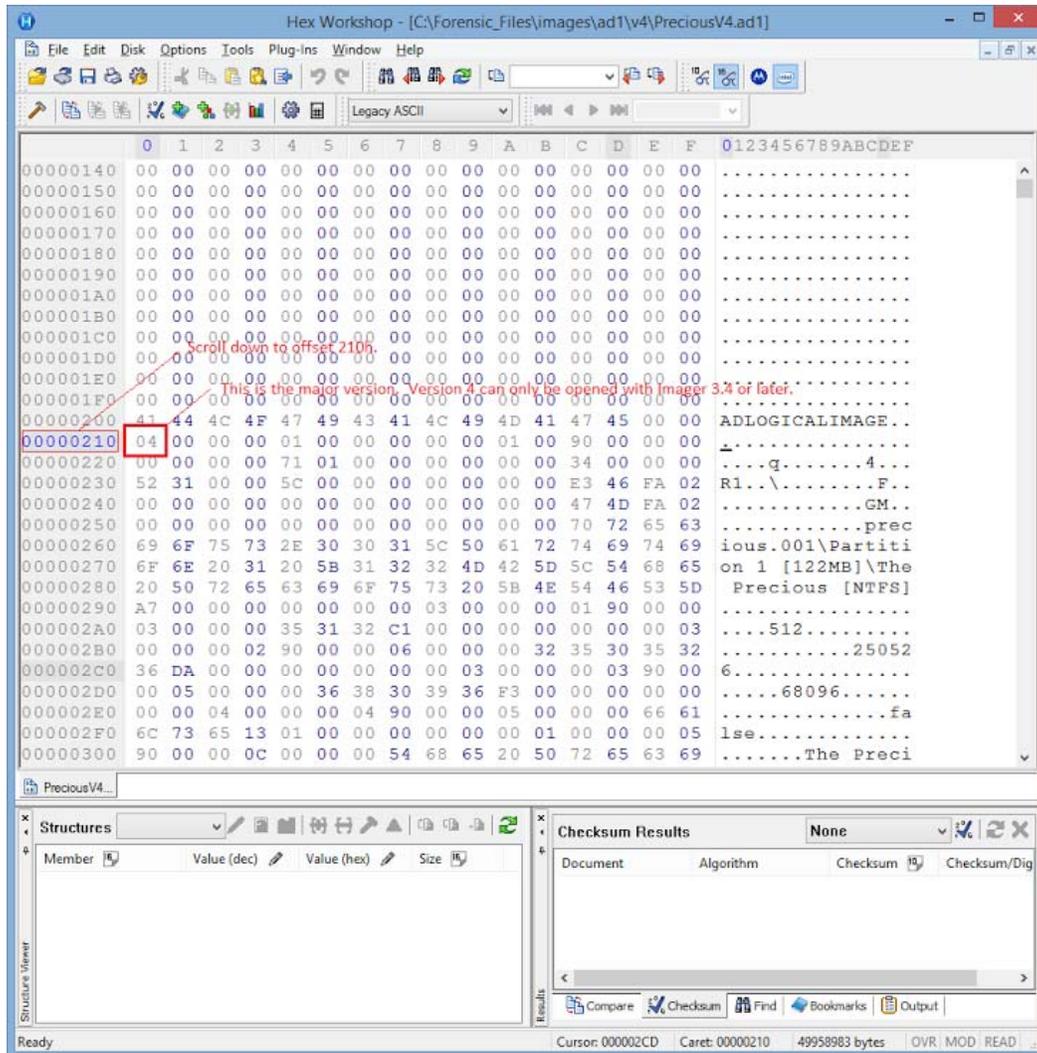
Comments?

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