Summation 4.0.3 Release Notes

Introduction

This document lists the new features and known issues for AccessData Summation 4.0.3. Please be aware that all known issues published under previous release notes still apply until they are listed under "Fixed Issues."

Important Information

- Service Pack 1 is required for Windows 7 Summation Express.
- Summation 4.0.3 Express for Windows XP requires a minimum of the following components: Dual Core, WinXP Pro SP3, and 2G RAM.
- Only one user may access the Summation Express application at a time.

Improved Features

Summation 4.0.3 now works with a Windows 32 bit system for XP and Windows 7.

Known Issues

Cluster Analysis does not work for Windows XP 32-bit systems for the following features: Near duplicates, Email Threading, and Conversation view. (67236)

Summation 4.0.2 Release Notes

Introduction

This document lists the new features, fixed issues, and known issues for AccessData Summation 4.0.2. Please be aware that all known issues published under previous release notes still apply until they are listed under "Fixed Issues."

Important Information

- It is strongly recommended to configure your antivirus to exclude the database (PostgreSQL, Oracle database, MS SQL) AD temp, source images/loose files, and case folders for performance and data integrity.

New Features

Comparison View

Comparison view is a new viewer in Case Review that allows you to view two documents side-by-side that were found as similar during the cluster analysis processing.

Reports

The following reports have been added to Summation.

Deduplication Report

You can open the Deduplication Summary report to view duplicate files and emails that were filtered in the case. Also included in the report are the deduplication options that were set for documents and email. You can view the report, print it, and save it in a variety of formats, and download it to a spreadsheet.

Data Volume

You can generate the Data Volume Report to view the size of processed data, evidence file counts by file category, and a breakout of files by extension. You can view the report, print it, and save it in a variety of formats.

Documentation

The Summation documentation is now easy to find from your Summation application. You can access the Summation user documentation after logging in to the application.

Fixed Issues

Transcript

- Improved Transcript viewer where preamble numbers are accurately displayed when printing or reporting. (60554, 65281, 65285)
- Support loading of Canadian Transcripts in CAT format. (64143)
- Addressed the issue where Search wasn't highlighting the Transcripts & Exhibits. (65154)

Search

- Now displays of more accurate Search Relevancy percentage. (65525)
- Support for EQUAL operator in default date fields. (66076)
- Fixed a permission issue in 'Redaction Fails' Search. (65475)
- Fixed an issue with the group validation. (64912)

Review Layouts

- Conversation Panel has been added to the Search Layout. (66161)
- Remove unnecessary layouts from the default list. (66157)

Production Set

- Improved watermark quality in the Production Sets. (65036)
- Addressed the issue where Production Sets were missing redactions created both on Image and Native views. (65599)

Home Page/Management

- Removed irrelevant Menu from the UI. (65966)
- Actions Column is now the first column in the case list. (66156)

Natural View /Image View

- Improved performance when loading document in Natural view. (65719)

- Prizm version upgraded to 5.0 improved multiple functional areas:
  - Improved the Text Redaction placement accuracy. (59844, 61743, 62356, 64023 & 64031)
  - Addressed the issue where Text Redactions were saved as Co-Ordinate based redactions in a specific scenario. (61867)
- Addressed random error message while switching between Document viewers. (65861)
- Addressed the issue where the deleted text redactions are preserved. (64834)
- Addressed issue where Auto Save was not saving removed annotations. (64440)
- Fixed GetFileStream_WithCaseIdentityHandler.ashx error when viewing some emails. (65762)
- Fit to Width and Anti-Aliasing are set to be defaulted for INSO View. (65411)
- Improved navigation for multi-page documents in Natural and Image view. (65644)
- Email of the pivot document is shown now in natural view when selecting in conversation view. (62801)

Desktop Express

- Addressed the issue where the user saw a blank page after logging in with some specific screen resolutions. (65956)
- Export UI is now consistent with server UI. (65975)

Mobile System

- Several licensing related issues have been resolved. (65458, 65704, 65705 & 65716)

Label View

- Fixed concurrency issues when user simultaneously add label to the document. (64731, 65066)
- Fixed Auto Save functionality in Label view when consecutively saving with more than 10 records. (65860)

Installer

- Installer improvement for single and multi-server environment. (65830, 66159, 66269)

Imaging

- Performance improvement for imaging. (63747)
- Error log improvement for imaging. (65325)

Grid View

- Fixed for Quick Filter: Hide eDiscovery Refinement. (65286, 65287)
- Fixed for removing duplicated items in Action menu. (65807)

- More relevant columns are now displayed in the Item list grid by default. (66162)

Facets

- Fixes for correcting counts in Facets. (63989 & 65683)

Evidence Processing

- Addressed the issue where embedded graphics within emails are being treated as attachments. (61754)
- New processing option in the UI to allow for email body caching during processing. (63897)
- Fix for processing Evidence Images (AD1, E01) files. (65133 & 65594)
- Correct default de-duplication options for processing email evidence. Set to use To, From, Subject, CC and Submit Time. (65479)

Coding

- Fixed Auto save functionality when coding only custom Text field. (65559)

Copy Case

- Improved Copy Case Login UI to accommodate DB Admin credentials. (66057)
- Optimized Copy Case/Merge Process by cleaning data placed in the temp directory. (65846)
- Addressed issue where new labels created in Local system were overwriting some labels in the Network system in a specific scenario. (65810)
- More user friendly status/ error messages during Copy Case operation. (65481 & 65678)

Known Issues

- When opening Summation for the first time, without any cases yet created, you will receive a "please wait" progress bar on the Home page until you create your first case. (66087)
- Using Save &Next button when coding for DocDate value throws an error message. Data is saved. (66086)

Summation 4.0 Release Notes

Introduction

Summation 4.0 is the culmination of the best features of Summation iBlaze, CaseVantage, and AccessData Early Case Assessment.

AccessData Summation is an online case management hosting service that provides users with secure access to an off-site document repository which hosts documents, transcripts, electronic evidence, work products and annotations. It acts as a self-contained workspace where users can store, search, code, review, and produce all of the documents retained as evidence in any legal matter. Access to these documents is determined by assigning varying levels of group or individual permissions.

This document lists the key features, known issues, and important information for AccessData Summation 4.0 product.

Important Information

- Though Summation 4.0 retains many of the features that previous versions of Summation contained, not all feature functionality is the same. Please refer to the Summation Users Guide for a full description of the features in Summation 4.0.
- In order to achieve maximum processing efficiency, configure the maximum memory for SQL Server to half the RAM on the machine.

Key Features

The following features are key to using Summation 4.0.2.

Administrator Features

Administrators have access to the following features to manage Summation 4.0.2 on a global scale. Administrators perform their primary tasks on the Management page.

Manage Users, Groups, and Admin Roles

Administrators can manage users, groups and the global admin roles from the Management page in Summation. The easy-to-use interface allows administrators to add, delete, edit, deactivate, and associate roles with users and groups. Administrators can also reset passwords for users from this page.

Configure System

Administrators can configure the Summation system to meet the needs of the practice. The following features can be configured for Summation from the Management page:

- Configure Active Directory to enable syncing and importing of Active Directory users
- Configure default settings that will be used for all cases

Monitor the System

- **System Console**: Administrators can monitor the performance of the *Distribution Server* and the *Work Managers* from the System Console.
- **System Log**: Administrators can export the system log and maintain a historical record of events in Summation.
- **Security Log**: Administrators can monitor a variety of events including the log in and log out attempts by administrators and users of Summation.

Case Manager Features

The case manager can perform a variety of tasks on the Home page and in Case Review. The case manager, given the right permissions, can manage the users, groups, permissions, evidence, and production of a case. Case managers can use the following features on a case by case scale.

Starting Cases

Using the *Case List* panel on the *Home* page, case managers can add or delete cases as well as add evidence to cases.

Managing Permissions

Case permissions have been stream lined to set all the permissions for users for a case in one location. Case managers can use the *Permissions* tab on the *Home* page to add users and groups to a case and grant case permissions.

Configuring Review Tools

The following review tools can be configured by the case manager.

Markup Sets

You can create a grouping for reviewers' annotations to be saved under. This gives you the ability to give users access to specific markup sets. Also, it allows you to have different sets of redactions if you are redacting for different purposes. These different sets can be combined during production set creation. You can toggle between sets in the Natural viewer.

Highlight Profiles

You can create profiles that highlight keywords in the Natural panel in Case Review. This feature enables reviewers to quickly spot important keywords in documents.

Custom Fields

You can create custom fields that can be used to create tagging layouts.

Tagging Layouts

You can create a collection of custom fields that reviewers can use to code documents in the Case Review. This feature allows you to create a custom layout for reviewers that contains the important information for their workflow to help streamline the review process. This feature replaces the forms that were used in iBlaze.

Setting up Review

Case managers can use the Case Review page to set up the review for users to review documents. The following features are available for case managers in the review interface.

Document Groups

You can add document groups to organize uploaded evidence. You can assign permissions to document groups. Document groups support "blended collections," which means that different document types (scanned paper doc, edoc, and email) can be stored in the same group.

Transcripts and Exhibits

You can upload unlimited transcripts and exhibits for review. Exhibits are searchable and you can assign permissions to transcript groups. There is a better handling of unicode Transcripts and foreign language (i.e. French).

Review Sets

You can create sets of documents and assign them to users for review. Users can then check out the review sets, and review and code the documents in the set before checking them back in. This is a way for you to track the progress of document reviews.

Tags

You can create Labels, Issues, and Categories for users to apply to documents.

- **Labels**: You can color code labels and apply to documents in the Case Review.
- **Issues**: The case manager can create issues which can then be coded into documents by the case reviewer.
- **Categories**: The case manager can create category values for check boxes or radio buttons which can then be coded into documents by the case reviewer.

Production Sets and Exports

Case managers can create production sets in the Case Review from labeled evidence. Creating a production set is easy to follow with the Production Set Wizard. You can choose one or more markup sets to burn into your production set so that you can see annotations and highlights in your exported data.

Case managers can use the export feature on the *Home* page to export previously created production set data. You can now export production sets to standard load files.

Processing

Summation includes the ingestion of raw native files, parsing the metadata from those files into database fields, and providing a search capability to those files in Case Review. Using the Evidence Processing Wizard, you can easily process PST & NSF files (email containers) and handling of DII and CSV has been streamlined and improved.

Reviewer Features

Reviewers can view, search, filter, label, code and annotate documents using the *Case Review* page. You can also review the history of actions performed in the Case Review for each document. The following features are available to the case reviewer.

Customizing Panels

The Case Review is made up of panels that reviewers can customize to meet their work flow. Panels can be moved, hidden, shown, and docked. Reviewers can then save their customized layout for repeated use.

Viewing Documents

Reviewers can view documents using the following panels in Case Review:

- **Natural**: You can view the document without requiring the native application to be installed on your computer. You can make redactions, annotations, and notes in this view. In Natural view, you can redact annotate by selecting text without first creating an image.
- **Image**: You can view, redact, and annotate image documents.
- **Text**: You can view the document's content as text.

Mass Actions

Using the mass operations feature in the Item List panel, you can perform actions (labeling, coding, imaging) on many documents all at once. This can be used on any set of records from search results or an filtered data set. This feature also allows you include, in the action, documents related to the records that you have checked (i.e. family documents, similar documents, and linked documents).

Transcripts

You can view transcripts using the Transcript panel. This panel allows you to annotate, highlight, and add notes to transcripts. You can print and create reports for transcripts.

Conversations

The Conversation panel in Case Review displays email conversation threads and emails from a cluster. The Conversation panel shows any compilation of related messages that makes up a conversation and email messages from a cluster that contain similar text. This feature will save you time when sifting through email records.

Linking Documents

Reviewers can use the Natural and Transcript panels to link highlighted text to other documents in the case. The Linked panel can be used to see the links for the selected document.

Searching Documents

Reviewers can search through documents using the Case Review search features to find relevant evidence. The search results are presented with a relevancy ranking. The following search features are available:

- **Quick Search**: You can search through the documents in the *Item List* panel using keyword or boolean search terms.
- **Advanced Search**: Advanced search is an improved query builder that allows you to search from a specified search scope of documents using keywords, regular expressions, fuzzy, stemming, phonic, related, or synonym searches. You can also search by the data in the fields of the documents. Term Expansion is a concept search that is also included in the advanced search.
- **Recent Searches**: The 10 most recent searches are saved in the *Recent Searches* for you to run again, if desired.
- **Save Searches**: You can save your advanced searches in *My Searches* to be run again.
- **Share Searches**: You can share your searches with other user groups.

Filtering Documents

Reviewers can use Case Review to filter out documents and find relevant evidence. The following filter features are available:

- **Facet Filters**: Use the pre-defined filter facets to exclude documents from the *Item List* panel and cull down the evidence. Some of the pre-defined filter facets include: filtering based on custodians associated with the case, filtering based on the email senders domain, filtering based on email date, filtering by file size, ect...
- **Column Filters**: Filter out documents in the *Item List* panel by selecting the data you want to view from each column. This "spreadsheet-like" feature displays the number of items in each column so you know how many documents have data in that column before you set the filter.

Applying Tags

Reviewers can organize evidence by applying tags to documents. The following tags are available:

- **Labels**: Apply labels to documents using the *Labeling* panel and the mass actions in the *Item List*.
- **Issues**: Categorize documents into issues by coding the issue to the document using the *Coding* panel and the mass actions in the *Item List*.
- **Categories**: Code documents for custom categories using the *Coding* panel and the mass actions in the *Item List*.

Imaging Documents

Reviewers can use the mass actions in the Item List panel to convert multiple documents to images.

Known Issues

The following are known issues:

- Newly created Issues and Categories in Case Review do not appear in the Bulk Coding window unless the program is refreshed. (62667)
- You must left click and then right-click to remove a new highlight in a transcript without first refreshing the document. (61895)
- Newly created Issues and Categories will not appear in the Coding layout until the application is refreshed. (63973)
- BegDocID is not available as a viewable column in the Item List panel. (64256)
- In the Alternate View window, Natural panel never completes loading records when there are no Tagging Layouts for the case. (64760)
- Users with the Manage Admin Roles, Manage Users, or Manage User Groups permission have the ability to upgrade themselves or other users to system administrators. (65045)
- Transcript View does not label preamble pages correctly. (60554)
- If you have documents coded with a child level issue, and you attempt to delete the parent level issue, you will receive an error. (64550)
- Changing the case of a letter from upper case to lower case or vice versa for a Tag, Label, Category or Transcript View name will not be saved. However, if you need to change the case of any of the characters in these item names, change the character to another letter, save your changes, and then go back and update the character to the correct letter and case. (64714)
- Deleting a Tagging Layout with fields still in it results in an error. (64793)
- The following fields can be added to the coding layout, but will cause an error to occur during editing: (62598):
  - Deponent
  - DepositionDate
  - EventTime
  - ModelNumber
  - SerialNumber
  - FSLocator
- Logicalsize and PhysicalSize columns with negative values mean "unknown" or "unavailable." (64999)
- Entering a bad path when exporting a production set will result in the inability to export any production sets until the system is restarted. (65353)

- You cannot overwrite a copied case with another copy when using the Copy Case utility. (65283)
- Review sets cannot have the same batch prefix. (65673)
- Embedded documents from a Word 2003 file format will not be expanded after processing. (65615)
- E01 and AD1 files brought into Summation using Evidence Processing will not expand to display documents within the file. (65594, 65133)
- If two users are labeling the same documents concurrently, only the last user's labels will be saved. Workaround: Use review sets and only have one user assigned to each review set. (65066)
- When redacting native documents, the output from a production set is a PDF file. This PDF file is a layered document with one of the layers being the redaction. If you have a PDF creation tool, you can open the produced "native" and remove the redaction. Workaround: Create a rendered image instead of the native. (63258)
- Keywords are not highlighted in Natural view when a highlight profile is selected. (61104)