

Summation 5.1 Release Notes

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Introduction

This document lists the new and improved features, known issues, and fixed issues for AccessData Summation 5.1. Please be aware that all known issues published under previous release notes still apply until they are listed under “Fixed Issues.”

For information about additional previous releases, see:

[Summation 5.0 Release Notes](#) (page 25)

[Summation 5.0.1 Release Notes](#) (page 17)

Important Information

Documentation

- These release notes and the user documentation may be updated periodically. View or download the latest version from AccessData’s website.

Installation

- To install Summation, Microsoft IIS (Internet Information Services) 64-bit must be running. Microsoft IIS 32-bit will not work.
- Summation Express does not support Windows XP. Summation Express supports Windows 7, both 32-bit and 64-bit versions.
- When installing Summation Express, the installer checks for a local Microsoft SQL Express database configured for Summation. If there is a SQL Express database, the installer uses it for the Summation Express install. If there is no SQL Express database, the installer installs a Postgres database by default.

FTK Compatibility

- Summation 5.1 is not compatible with FTK 5.0.x. To use Summation 5.1 with FTK, you must use FTK 5.1. Contact your AccessData representative for information about the availability of FTK 5.1. After installing Summation 5.1, do not point an FTK 5.0.x installation to this database.

- When you examine an existing FTK case in Summation, you will find that the search results counts are different in Summation than in FTK. This is because FTK and Summation processes searches differently:
 - Summation does not have the Live Search feature, while FTK has Live Search.
 - Summation only searches columns that are visible to the user. FTK will search columns that are not visible to a Summation user.
 - Re-indexing the data will change the search results counts.

ProductionDocID

- The ProductionDocID field has been restored to Summation as a virtual column. You can export this column to a CSV file within Review. Because it is a virtual column, you do not have access to the same functions as you would with a regular column. Some items that you need to be aware of when dealing with the ProductionDocID field:
 - When searching the ProductionDocID Column, you will only retrieve records for exported and produced items. The original object will not be retrieved for produced documents. (32856)
 - For advanced searches:
 - Use either **Contains** or **Exists** as search operators with the ProductionDocID field.
 - Advanced searches on the ProductionDocID by using the **NotEqual**, **NotContains**, and **Fails** operators returns incorrect results. (32186)
 - Advanced searches using the **Equal** operator will return only partial results. (32629)
 - The ProductionDocID column is not sortable. (32126)
 - In the *Advanced Search* dialog, the ProductionDocID column is listed twice in the **Conditions** field. (32151)
 - Search results for ProductionDocID will not be highlighted for Export Sets when using the Original File Name naming option with the Append ObjectID option. However, search results for ProductionDocID will be highlighted for Production Sets and Export Sets when the naming is DocID or Original File Name. (32173)
 - The column filtering will only work for export sets and the produced record. The Production DocID value that appears on the original record is not filterable. (32176)

5.1 New and Improved Features

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

For information about new features in previous releases, see:

[5.0.1 New and Improved Features](#) (page 18)

[5.0 New and Improved Features](#) (page 26)

General

Updated Terminology

The following terminology in Summation has changed:

Previous Term	New Term
<i>Case</i>	<i>Project</i>
<i>Custodian</i>	<i>Person</i>
<i>Custodians</i>	<i>People</i>
<i>System Console</i>	<i>Work Manager Console</i>
<i>Security Log</i>	<i>Activity Log</i>
<i>Audit Log</i>	<i>User Review Activity</i>

Management

Active Directory Synchronization

The ability to synchronize with Active Directory to import users has been enhanced. You can now schedule synchronization recurrence so that users are updated consistently.

Known File Filter

Summation now includes Known File Filter (KFF) capabilities. KFF is a utility that compares known file hash values against those in your project files. You can import KFF hash sets into KFF libraries and then create KFF groups. With KFF Groups, you can access the hash sets for your project. This functionality allows you to either ignore files that have been approved by KFF or focus on files that have been flagged by KFF.

Home

Free Hosting

All active Summation users have access to two GB of hosting and review space on the Summation-hosted platform. To access the platform, please call 1-800-547-5199.

Review

Visualization

- Summation now has a new Heatmap Visualization feature. This feature provides a visual representation of the files being investigated within a project by their type, size, or count. With Heatmap Visualization, you can:

- Select a file category, such as Documents, Spreadsheets, Graphics, Email, Executables, Archives, and so on.
- View by file types, folders, or extensions. You can then view by file count or file size.
- Explore each category and view data that is grouped into sub-categories. For example, you can open the Graphics category to see sub-categories of JPEG, Tiff, Bitmap, PNG, GIF, and so on.

New Facets

- The *Evidence Explorer* facet - This new facet lets you narrow down the items for which you are looking by displaying a tree view of the evidence files in the project. You can follow the actual file path of a piece of data and see the path from which it was collected as well as the contents of the file.
- Facets for Known File Filter (KFF) - New facets are available for viewing KFF-related data.

Updated Facets View

- Several facets have been updated with the following new features to help you work with large amounts of data:
 - When you select a category, the top facets within that category, based on your sort order, are displayed. For example, if the facet is sorted by largest hits to smallest hits, the top ten facets with the most hits within that facet is displayed. From this top list, you can expand the facet to see additional facets within the category.
 - A search feature has been added to the updated facets. This allows you to search for specific values within each facet.
 - This new design has been applied to the following facets for Summation 5.1:
 - Custodians
 - Authors
 - Email Senders Display Name
 - Email Senders Address
 - Email Senders Domain
 - Email Recipients Display Name
 - Email Recipients Address
 - Email Recipients Domain
 - Email Recipients BCC
 - Email Recipients CC
 - Email Recipients To

Note: All other facets will be converted to this new design in a future release.

Quick Columns

- The new Quick Columns feature allows you to select from a set of predefined column criteria to display related columns in the Item List panel. The following Quick Columns are available:
 - eDocs
 - eMail
 - Transcripts
 - Notes

- Scanned Paper
- KFF

Label Information as a Column

There is now a field that allows you to see all of the labels assigned to a given document. If a label was assigned a color, the color block as well as the name of the label is visible for easy viewing. Multiple entries will be separated by semicolons. The label field can also be exported to a CSV file.

Search

You can now import a full set of search terms without having to run consecutive searches. The character limit is 4,000 characters for single byte characters and 2,000 characters for double byte characters.

Export

You can now export native fields using the *Use Original Filename* or *Use Original Filename and Filepath* options to much longer paths than previously available. There are some limitations to this option, however. These limitations are as follows:

- If the full filename (with its path) exceeds 260 characters, you cannot open or modify the file due to the NTFS limit.
- When exporting native files, extensions are appended to the file name. If the extension makes the full file name longer than 260 characters, the file will not be exported. When this occurs, the error is reported in the export log file.

Migration

- You can now migrate an iBlaze or Summation Enterprise case when images for that case are stored in a different directory than the rest of the case files.

5.1 Fixed Issues

The following issues have been resolved for this release.

For information about fixed issues in previous releases, see:

[5.0.1 Fixed Issues](#) (page 18)

[5.0 Fixed Issues](#) (page 32)

Summation Express

- Fixed the issue where an error would occur during installation of Summation Express on Windows 7 Pro. (9039)
- With the Windows 7, 32-bit upgrade installation, changing the export settings to "Australian Numbering" no longer generates an error message. (9362)

Database

- Fixed the issue where on a system with multiple PostgreSQL databases, deleting a project had a chance to fail. (15764)

Migration

- Fixed the issue that when migrating iBlaze cases to Summation, if the iBlaze case had a folder with more than 50 characters, the folder was not migrated. (19176)

Upgrade and Installation

- The installer for Summation Express for Windows XP only installs with MSSQL Express. (30454)
- Fixed the issue where the APR default path did not get updated when selecting a custom install path. (31710)
- Fixed the issue where the configuration file was not edited when upgrading Summation from an earlier version to a newer version. (28725)
- Fixed the issue where search results were not returning correctly after the database was updated with the DB config utility. (28546)
- Fixed the issue where an error would occur when installing Summation with the Windows XP Desktop installer. (30107)
- Family information now displays correctly in imported documents after the system has been upgraded from version 4.1.2 to 5.0.0 to 5.0.1. (28545)
- Microsoft Forefront no longer flags the files used to install Summation as infected with the Exploit virus. (9659)
- Fixed the issue that after upgrading, production sets would sometimes not complete. (27783)

FTK Compatibility

- For FTK compatibility, you can now use Integrated Windows Authentication (IWA). (22738)

Home

- The First Name, Last Name, Email Address columns under the *User* tab in *Tagging Layouts* now populate correctly. The *Description* column under the *User Groups* tab in *Tagging Layouts* also populates correctly. (12765)
- You can now remove a user group from a project without an error. (12725)
- Fixed the issue where ModifiedByID was not populated when a project was deleted. (9516)
- Clarified an error message that appears when a user tries to create custom columns with spaces. Error message now defines what characters cannot be used when creating a custom column. (31250)
- In the Target Project menu of the Project Property Cloning wizard, the projects are now listed alphabetically. (25432)
- Fixed the issue that when exporting to a CSV file, if the page size was set to 100, and after executing and clearing a search, the document count was incorrect. (30332)

Project Creation

- Project Administrators can now associate User Groups to a project in the Associate User/User Group window. (25360)
- The Description field in the Project Details tab now accepts line feeds. (26154)
- Underscores (_) used as part of a hostname in the Create Project window are now accepted in Summation. (12710)
- Fixed the issue that after upgrading a case with Production Sets and then adding additional evidence, some records were getting inconsistently deduplicated. (29412)

Work List

- Fixed the issue where the Work List would time out when containing a large list of Work List items. (21777)
- Project Administrators can now view all jobs submitted by other Project Users and/or Administrators within the Work List. (5878)

Import

- Importing a Concordance file type now uses the correct ASCII character (ASCII 20) as the default field separator. (26106)
- Fixed the issue where imports of CSV data using the Update feature inadvertently changed the filetype metadata of records, *Natural Viewer* display, and the *Conversation* panel. (14235)
- You can now import native files and native files with images from Concordance and Relativity to existing Document groups. (25530)
- You can now import data into the MD5Hash field, so that you can get the same information into your project by importing a load file as you can by processing the evidence. (15945)
- Fixed the issue where sometimes reindexing would not remove old object data from the index in all projects. (31669)

Processing

- Improved file processing speeds. (29851)
- Fixed the issue where temporary files located in the 'adtemp' folder were not getting deleted after processing. (12683)
- Fixed the issue where the 'Cluster Threshold' settings set by the user in Processing Options were not being saved after a project had been created. (12351)
- Fixed the issue where Evidence Processing (EP) jobs stalled and wouldn't resume until the system was restarted. (30547)
- The **Start Processing** button now disables after a processing job starts. (29542)
- The **Standard No Search** Processing Option has been corrected. A document processed with these settings are not searchable and the indexing value is set to 0. (5915)
- Fixed an issue where processing failed to OCR readable but non-searchable PDFs. (30207)
- Fixed the issue where indexing would stall when more than one processing job had been submitted. (31344)
- Fixed the issue that when processing with OCR enabled, the ADTemp space filled up and the job failed. (29410)

Review

- Fixed the issue where the Toggle Annotations button stayed enabled when switching between Markup Sets. (7539)
- Both the Natural and the Image Panel, when displayed side by side, will load properly when switching between Edit and View mode. (21477)
- Fixed the issue where the grid tally in the Item List shows data from the issues field, even when the user does not have permissions to see the data. (5905)
- Fixed the issue where only one To: recipient would appear in an EML-loaded record. (29409)
- The **Next** button in the *Notes* Panel is now enabled when two or more notes are available. (12666)
- Clicking the **Next** button in the *Notes* Panel no longer displays an error if only one note is present. (12664)
- Hyperlinks displayed in the Natural Viewer no longer navigate to the link's location. (29814)
- Fixed the issue where, at times, you could not annotate a document or an image after navigating from *View* mode to *Edit* mode. (30312)
- With OCR Enabled, OCR text is correctly generated for PDFs embedded in email messages. (23464)
- Deleting a Parent Document will no longer delete the files attached if they are not part of the same document group. (20268)
- An exception no longer occurs in the *Activity History* panel for users that have been deleted. (29259)
- The logged in user's first and last name are now displayed in the right top corner of the *Review* page, instead of the user's ID login. (30062)
- Permissions have been updated to allow users with the correct rights into Edit mode for the AD Viewer. (28276)
- Fixed an issue that allowed users to draw redactions outside of the viewer panel. (22085)
- Fixed the issue where the *Family* Panel was incorrectly populating the entire compressed file contents for OST, AD1, and E01 files. (14353)
- To avoid memory issues, the *Family* Panel now caps records retrieval to 1000 records. (32434)
- MSG files selected in either the Item List Grid view or Summary view now display properly in the Conversation Panel. (13959)
- Fixed the issue that when viewing large files, such as high-resolution PDF files, a "View Window has run out of memory" error occurred or Internet Explorer crashed. (29555)
- Fixed the issue that when viewing .DOC files in the Natural View, special characters may have also been displayed at the top of the document. (12367)
- When naming Review Custom Fields, you can now use spaces. (13795)

Annotations

- Fixed the issue where redactions in filtered text would overlap. (30609)
- You can now add markup sets and redaction reasons to documents without an error occurring. (29391)

Case Explorer

- Email and Author Facets now correctly populated the From and other multi-entry columns. (7309)
- Fixed the issue where applying a filter on multiple tabs in the Case Explorer would not clear when using the reset option. (1849)
- Fixed the issue that when creating a document group, neither the ParentDocID nor the AttachDocIDs were not populated. (30245)

Review Batch

- All Review Batch folder numbers now display correctly and sequentially when creating a Review Set with the Include Family Option enabled. (29388)
- Fixed the issue that when selecting the “All (x)” action for a review set, the following error occurred: “Checking out batches cannot use the “all (x)” action drop-down” (28249)

Transcripts

- Fixed the error that when creating a transcript group and uploading a transcript, and not being a Case Administrator or Global Admin, an “upload error: Failed to upload file” error occurred”. (26452)

Exports

- Users with no ‘Delete production set’ permissions are now restricted from deleting production sets. (16926)
- When you create a production or export set, a Naming Files step has been added to the production or export user interface. This allows the production or export interface to display the correct percentage of completion during the Family Organization step. (24351)
- The custom columns in a Production Set will be populated with values in Project Review. (5829)
- Fixed the issue where the *BegAttach*, *EndAttach*, and *Attachment* range fields were not correct in exported families. (5833)
- Records in an Export Load File are now sorted correctly according to the sort parameters provided by the user. (20546)
- Summation now creates files and folders correctly when using the Original Path option during an Export Set or a Production Set. (25842)
- Using an Original Path export now correctly exports all files including those with the same name but different file extension. (26142)
- Fixed the issue where some items within Production sets did not display in the Natural View. (29674)
- All pages of a record now export correctly when that record has redactions on images and the PDF option selected. (29090)
- Template names for Production Sets and Export Sets are now restricted to no more than 75 characters. (27466)
- Fixed the issue where PDFs exported from a production with the “original file name and original path” naming option did not get Bates stamped. (29411)
- Load files no longer reference children documents that are not included in the production or export set. (29843)
- You can now view and export the ProductionDocID field to a CSV file. Search and filter the documents by the ProductionDocID. You can generate a privilege log for produced records that includes the ProductionDocID, the original ObjectID, the original DocID, and the text column containing the attorney notes. You can also cross-reference produced records with the original record using the original ObjectIDs and DocIDs. (27886)
- When exporting or creating a production set from single page TIFF images to a multi-page TIFF or a PDF format, the output pages are now branded correctly if you use the Bates branding option. (31389)
- When using the Export option for Australian Numbering, you no longer get an error when creating a production set with the option **Only PDF Files Include Party, Box, and Folder in Name** selected in the *Document* field. (30551)
- Fixed the issue where only the first page of the record is produced if the source record was imaged as a PDF and a production set was created with the “PDF option” to render images. (32304)

- Fixed the issue where the Original Filename and Original Filepath options for Production Sets and Export Sets were not working on files that were initially imported into a case. (25051)
- Fixed the issue where a memory error occurred during the creation of a large production set. (28079) (32555)
- Fixed the issue that when emails are in the root directory of an included PST (and not in the folders such as Inbox), then labeling emails to not be produced, all the emails were included when Production to PST is selected. (29707)
- Fixed the issue that when performing an export with the multi-page option, if redactions were placed on images for a record, slipsheets were added to the export folder. (27856)
- Fixed the error that when creating a production set, a “Job Name Is Not Unique” occurred. (25171)
- Fixed the issue that when performing a load file export, and using the Summation EDII format, the load file was not generated. (24155)
- Fixed the issue that when when producing multi-page records that have single-page TIFs as a PDF, only the first page of single-page TIFs is added to the PDF in the production set record. (29285)
- Fixed the issue that when an original record had redaction on images, the export load file record had an @EDOC token with a path pointing to a Native file that did not exist. The token is no longer present. (21108)

Facets

- The filter dialog on column filtering for the To, CC, and BCC fields populate with data when applied on the Facet Results. (29904)

Search

- You will get correct search results when you execute a search with the “Include Family” option selected and rerun the same search after editing the sort order through Search settings. (23237)
- The In-Document search option is now available for CoolHTML (msg) and CoolRTF (EML) files. You may search by complete keyword, and search keywords are highlighted. (28313)
- Fixed the issue where Boolean searches with an asterisk would cause the system to crash. (29549)
- Search terms with underscores in the value are highlighted in the search results. (19165)
- Correct queries entered in an AnyText query no longer generate "Parenthesis do not balance" errors. (29458)
- Summation no longer displays a Load Operation Failed error during a query. (24974)
- Fixed the issue where incorrect highlighting occurred in the search results when there is a wild card asterisk (*) in the search query. (28617)
- Fixed the issue where inconsistent highlighting results occurred when searching on DocDate and NoteDate fields. (8232)
- Fixed the issue where the document count was incorrect when a CSV file was generated after executing and clearing Search with the page size set to 100. (28236)
- “Search Options” will display in search reports under the *Details* tab. (11769)
- Search times have been improved significantly in the instance where searching with **Include Family Expansion** has been selected. (21912)
- Search highlighting now works in both Natural and Text views when the search terms are enclosed in double quotes for the AllFields query. (26162)
- Fixed the error that when executing a query with a NOT operator, search did not return correct results. (25988)
- Fixed the issue that when performing a search, and there is a wildcard character * in middle of the word on Check boxes/ Radio buttons and Issues, it did not return any results. (28643)

- Using special characters in field names causes search to not work correctly. When you attempt to name or rename a field using a special character, a validation is now performed to prevent saving the name with special characters. (30706, 30749)
- Fixed the issue that when searching on Default Date fields (such as CreatedDate, ModifiedDate) with an EXISTS operator, it returned documents which had null values. (27240)

Coding

- Performance for applying coding, labeling, and searching to family members has been improved. (23938)
- The Review Responsive field is now mandatory when using Predictive Coding. (30159)

Global Replace

- Fixed the issue where a Global Replace job would be performed on all records in a project, instead of records culled in a search result set. (28371)

Data Sources

- When naming User Groups, you can now use spaces, dashes (-) and underscores (_). (13807)

Management

System Configuration

- Fixed the issue where saving the **Export Settings** for Australian Numbering would cause an error before the setting was saved. (13846)

System Log

- Fixed the issue where an error showed in the System Log after a bulk imaging job, even though the job completed successfully. (24536)

5.1 Known Issues

The following are known issues for this release.

For information about known issues in previous releases, see:

[5.0.1 Fixed Issues](#) (page 18)

[5.0 Known Issues](#) (page 35)

Copy Case

- When using Copy Case to copy a case from network to local, the “Keep Network Changes” option in the conflict resolution screen and the “Apply to all upcoming conflicts” option may not work correctly. (26088)

Migration

- Migrating from an iBlaze case does not bring data into the Applications field. (20200)
- Migrating from an iBlaze case does not migrate “Hot Facts” data. (5928)
- Metadata fields for Production Sets are not populated with values for migrated iBlaze cases. (5926)

Summation Express

- You cannot generate TIF/Graphic SWF for VSD files. (23968)
- During installation, if you leave the **Retype Password** field blank on the *SQL Express Administrator Password* dialog, the installation does not allow you to enter the correct password in subsequent attempts.
Workaround: Click **Back** and then click **Next** to refresh the *SQL Express Administrator Password* dialog. You can now enter the correct password without issues.

Upgrade and Installation

- After upgrading from version 5.0.1 to 5.1, if you go to an existing project that has previous jobs listed in the work list (such as imaging or bulk labeling), an error will occur and no information will appear in the job details tab. (31576)
- Users with administrator rights are not added to the following certificates: ADeDiscovery, eDiscovery Services Client, and eDiscovery Services Server. (5851)
- For compatibility requirements across AccessData products, multiple versions of the Processing Engine are allowed to exist on a single machine at the same time. This does not affect functionality, but if users do not want the older Processing engines on the computer, they need to be uninstalled manually. An upgrade that has a different major.minor EP version number will leave the older version on the machine and install the new one side by side. (32497)
- When a system has been upgraded from an earlier version of the software, the project path will be hidden for new and existing projects. (30239)
Workaround: Go to the *Management* tab > *System Configuration* > *Project Defaults*. Deselect the **Hide** checkbox for *Project Folder Path*.
- You may get an exception error when selecting the *Work List* tab after upgrading the system to the newest version of the software. (30240)

FTK Compatibility

- Group labels created in Summation do not display properly in FTK. (31180)

Home

Import

- If a DII file has iterations, images are not imported. The Work List shows the job as complete, and an error count is listed in the Details pane of the Work List. (5877)

Processing

- The processing count is incorrect when multiple RAR archives are processed by the EP Folder option. (31238)
- When you attempt to process a TIFF document with processing options set to **Enable OCR**, both Filtered and OCR text are generated. (32591)
- If processing a folder containing 20,000 loose file within a single folder, the processing may time out and fail. A System.TimeoutException error is entered in the system log. (30411)

- If you have a case that processed an AD1 file using Summation 5.0 , and then view it in Review, when selecting the root of the AD1, the family panel may populate all files within that AD1 file rather than behaving similar to a PST, where selecting it should not populate any documents in the family panel. (31350)

Project Property Cloning

- In **Project Property Cloning**, if you have deleted a project, the option to clone that project will appear in *Source Project* list and *Target* list. (32594)

Work List

- *Create Doc Group* jobs are not listed in the Work List. (5894)

Job Creation

- When configuring a project, a section appears for configuring “Network Data Purge Options.” Summation does not perform this action. (32347)

Review

- When logged in as a Non-Admin user, and when the page size is set to 75-100, when navigating back to a previous page from the last page an exception error may occur. (30792)
- In the Text View, OCR text is copied to the Filtered Text window. (12418)
- Attachment Count does not match the count of attachments listed under AttachDocIDs. The AttachmentCount is incorrect. (32184)
- The AttachmentCount is not populated for a zip file even though the AttachDocIDs and Parent ID columns get populated. (32182)
- The Heatmap Visualization feature does not show “unknown” filetypes by size. (30223)
- When using dual monitors, closing a popup window returns the Viewer to the previous view. For example, if you were using Transcripts and switched to the Natural Viewer and then receive a popup window, the program returns to the Transcripts page. (18887)
- The Source ObjectID Column Name is not consistent between the Item List and the Production Panel. In the Item List, the column is named Source ObjectID, and in the Production Panel, the column is named SourceID. (32129)
- The keyboard shortcut CTRL+SHIFT+S does not save items when editing them in Review. (31002)
- The latest version of Native Viewer 8.4.1 (installed with Summation) cannot display charts embedded into Microsoft Excel. (29557)
- When configuring Label Assignments for an AD1 file in the *Family Panel*, if you use the *Family* option, the operation may time out and the label assignment may fail. (32763)
- After creating a label, making label assignments, and viewing the Labels column, incorrect values may be displayed in the Labels field. (31669)
- Counts in the Filter dialog for some columns are inconsistent with the Item List count of the same columns. The suspect columns are:
 - Application
 - Author
 - Authors
 - ClusterID
 - Conversation Index - New Column
 - Conversation Topic - New Column
 - Importance - New Column

- Sensitivity - New Column
- Recipients
- Source

Annotations

- After upgrading a project from version 5.0.1 to 5.1, some coordinate-based redactions may appear as if it does not fully cover the word being redacted. However, the redaction will be properly placed. (32272)
- The size of the redacted text on a produced image may be too big and the full redaction reason may not be visible. (32143)

Creating Notes

- You cannot save a note on a document in a non-US date format (For example: 30/11/2012) without an error. (13431)
- When you create a note, if you attempt to enter an invalid date format (such as 13/22/2013 or 12/45/2013), the **Save** button will be enabled. The **Save** button should be disabled. (31351)
- When you create a note, if you attempt to enter a fuzzy date format (such as Format MM/DD/YYYY - 00/00/0000 or 00/00/2012), the **Save** button is enabled. When the date is saved, the date saves as the last created date and not the fuzzy date that you entered. (31375)

Search

- Regular expression searches are not getting highlights in the Natural view, but will have them in the Text view. (32540)
- When performing re-indexing on your case, it is possible that your search will return improper results. To avoid this, please make sure re-indexing has finished before running a search. (27647)
- During an advanced search, using the **Expand All** button in the *Variations* pane multiple times within the same search term displays an exception error. (20203)
- Column changes made in Saved searches do not display in the search results grid. The columns *Source ObjectID*, *EmailMessage*, and *LogicalSize* display in the results grid even when they are not selected in the Saved search. (22624)
- Executing a search immediately after saving it may display a “*SavedSearch ID*” not found exception error. (22627)
- Running a search while a re-indexing job is in progress returns results that are different than the same search running without a re-indexing job running. (23585)
- The Equal/Not Equal operator is not supported on MultiEntry columns, such as CC, BCC, To, or CustomCheckbox. If a user executes a quick search on these columns with the Equal/Not Equal operator, an error will occur. (32539)
- Search terms with the “\” character separating words within the term (For example, “terms\conditions”) are not returning highlighted results. (31377)
- Searching (Quick Search or Advanced Search) on the Source ObjectID column displays an error. (32130)
- A search on a custom field will fail if the custom field has spaces or special characters in the field. (31071)

Facets

- The *Label* facet count includes documents that users do not have permissions to access. (23944)

Case Explorer

- Creating Tags (Label/Issue/Category) in *Case Explorer* will disable the Document Navigation bar. (24030)
- You need to manually refresh the Label panel after creating Label Assignments to see your label assignments for each record. (24230)
- When managing permissions on any Labels, Categories, Issues, My Searches, or Review Sets, you can view all User Groups instead of just the User Groups assigned to the project. (31795)

Imaging

- Imaging Excel documents with the Print Heading and Print Grid Lines options selected do not display headings or grid lines in the imaged document. (21966)

Coding

- You cannot access new coding layouts in the Coding panel for a project until you refresh the application or log out and log back into the application. (24232)
- The Coding Panel is not updated for cached items after “Bulk coding” is completed. (26048)

Transcripts

- When using two monitors with Summation with the Transcripts panel open, you must refresh the transcript view in order to view any changes made in the window. (10279)
- Entering a combination of transcript notes and highlights into a transcript may cause a delay when viewing that transcript. (19324)
- Users with all Project Role Permissions except for **Admin Reviewer** and **Project Admin** permissions are unable to view links for the exhibit document in the transcript. (32535)

Exports

- When creating a Production Set, if the Export path is left blank, an error displays in the *Production Set History* tab. (32327)
- An image will be branded incorrectly when “Bates” Watermark type is selected in creating a Production Set. (5853)
- The email body for Redacted Emails does not display in Load Files. (5910)
- In the Export table of a Ringtail load file, level 1 is the media type instead of being part of the doc number. (32089)
- When a Ringtail load file is exported and the page level is set to four digits, if a document in a folder causes the total pages to exceed 9,999 pages, the page count will exceed the allowable number of pages. (32091)
- When creating an export to Iconect format, no load file is created. (30378)
- Creating a Production Set for emails with **Include Images Only** selected, still creates .DAT files for natives and text files when exported. (31982)
- The Filtered Text View is enabled for OCR text in an exported Production Set. (32142)
- Branding on records with redactions produced as PDFs and multi-page TIFFs does not display in the Viewer. (31537)
- The AttachDocID column lists attachments, even though those attachments are not included in the production set. (32179)
- Production set records show the original DocIDs in the ParentDocID and AttachDocID columns, instead of the Production DocIDs. (32185)

- When exporting a Ringtail Load file, there are no references to the native files, only to the PDF files. (32090)
- For production sets created from a CaseVantage export, the BegAttach, EndAttach, and Attachment range fields are not displayed for child attachments in a family. Those fields will display for a parent document, however. (30376)

Bulk Printing

- When expanding the Bulk Printing status bar, you may experience a Window background overflow. (27996)

Management

Logs

- If a user closes the browser without logging out of Summation first, the logout activity does not appear in the Activity log. (5893)
- If you try to generate an Audit Log report with a large number of entries (more than 1,048,575 rows), the report will fail to generate. This is due to a limitation of Microsoft Excel that a single worksheet cannot have more than 1,048,575 rows. (32749)
- (Summation only) When viewing the System Log, the following errors may appear which do not affect Summation: (31255)
"Error while attempting to retrieve all SiteServer Jobs. Error: Could not connect to root instance"
"Unable to establish connection with Site Server Phone Home Settings Contract"

Permissions

- Case/Project Administrators do not have the ability to associate global roles to the case-level users. (32510)
- When configuring a custom Admin Role, you are not able to specify Create/Edit People or Delete People permissions. The Data Sources tab will display for administrator users only. (32859)

Comments?

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

Summation 5.0.1 Release Notes

Document Date: 8/20/2013

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Introduction

This document lists the new and improved features, known issues, and fixed issues for AccessData Summation 5.0.1. Please be aware that all known issues published under previous release notes still apply until they are listed under “Fixed Issues.”

For information about additional previous releases, see [Summation 5.0 Release Notes](#) (page 25).

Important Information

- These release notes will be updated periodically. Download the latest version from AccessData’s website.
- Summation Express does not support Windows XP. Summation Express supports Windows 7, both 32-bit and 64-bit versions.
- When installing Summation Express, the installer checks for a local Microsoft SQL Express database configured for Summation. If there is a SQL Express database, the installer uses it for the Summation Express install. If there is no SQL Express database, the installer installs a Postgres database by default.
- To install Summation, Microsoft IIS (Internet Information Services) 64-bit needs to be running. Microsoft IIS 32-bit will not work.
- When you examine an existing FTK case in Summation, you will find that the search results counts are different in Summation than in FTK. This is because FTK and Summation processes searches differently:
 - Summation does not have the Live Search Feature, while FTK has Live Search.
 - Summation only searches columns that are visible to the user. FTK will search columns that are not visible to a Summation user.
 - Re-indexing the data will change the search results counts.

5.0.1 New and Improved Features

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

For information about new features in previous releases, see [5.0 New and Improved Features](#) (page 26).

Summation Express

PostgreSQL Database Support

Summation Express now installs exclusively with PostgreSQL. Using a PostgreSQL database allows you to take advantage of PostgreSQL's stability and functionality.

Note: Oracle and Microsoft SQL Server Express will no longer be an option in the Summation Express initial install. You can install Summation Express with a Microsoft SQL Server if you already have the server dedicated to Summation Express. However, it is highly recommended that you install Summation Express with PostgreSQL for optimum functionality with Summation Express.

For 5.0.1, Summation Express provides an option to migrate your database from Microsoft SQL Server Express to PostgreSQL.

Review

Search

Search performance has been significantly enhanced, and search speed and performance have been improved. Searches involving the Boolean operator (asterisk) has been improved, allowing (asterisk) searches to return results quickly.

5.0.1 Fixed Issues

The following issues have been resolved for this release.

For information about fixed issues in previous releases, see [5.0 Fixed Issues](#) (page 32).

Summation Express

You now can generate images successfully for PDF, PPT, and PPTX file types in Summation Express. (24400)

Copy Case

Fixed the issue where the conflict resolution screen reappears after the cases have been merged and copied to a different location. (26074)

Home Page

Fixed the issue where a user with non-Administrator rights clicked the Download CSV File option in the Work List and received an error. (26168)

Case Creation

- Fixed an issue where creating a case on a system running virtual machines with a MS SQL server displayed an error. (24998)

Import

- You can now import LFP images without error. (25338)
- Fixed the issue where messages from a DII import were being filtered incorrectly. (28149)
- Fixed the issue where text extraction from a MSG file during import occasionally included the text of the attachments. (27992)

Processing and Imaging

- Fixed the issue where a multi-page TIFF with redactions would fail to produce as part of a production set. (25300)(25332)
- After upgrading from 4.1.2 to 5.0, processing status displays correctly for Evidence Processing cases in the Evidence Tab. (25272)
- Fixed the issue where text files were not being exported for evidence-processed email messages. (25548)
- Fixed the issue where imaging jobs would sometimes fail to complete. (24943)
- OCR options have been corrected, allowing data with OCR options to be processed faster. (12526)
- Fixed the issue where filtered text extracted from a native document from Evidence Processing contained Document Properties at the end of the text streams. (28104)
- Fixed the issue where an error might occur when running a deduplication report after processing. (29027)
- Performance speed has been improved for re-indexing jobs. (28613)

Custom Fields

- Fixed the issue where custom fields with radio buttons were not working after upgrading the program from 4.1.2 to 5.0. (27521)

Review

- Fixed the issue where the Native Viewer program would stop working when going into Case Review. (22204)
- Fixed the issue where users without Administrator rights could not access Case Review. (25306)

- Fixed the issue where an error was displayed when a user with no Administrator permissions tried to load a case that had production sets. (26378)
- Fixed the issue where some PDFs were produced in landscape view and redactions were not placed in the proper location. (24458)
- Fixed the issue where selecting a created, coordinate-based annotation enabled the save icon, even if there were no changes to the annotation. (26060)
- Fixed the issue where the Natural View failed on AD1 file types from a network share. (26248)
- You can now create a document group with over a thousand documents. (28818)
- Fixed the issue where where the ParentDocID and AttachDocIDs were not populating those fields when a new document group was created. (28835)
- Switching between Highlight Profiles in the AD Viewer no longer reloads all of the pages of a multiple-page document. (25896)

Search

- You can now add over 500 search terms in Advanced Search without an error occurring. (28080)
- Fixed the issue where after indexing has occurred, executing a Not Contains search on documents that have been assigned an Issue would return inaccurate results. (26288)
- You can now get search results when including an ampersand (&) and/or double quotes (") in the search query. (26064) (28914)
- Correct counts now display in the Search reports when you execute a search on documents that do not have any family attachments. (21084)

Export and Production Sets

- Fixed the issue where an export load file had an @EDOC token, even when the production set was created with "Include Natives" not selected. (25454)
- Fixed the issue where a DII for redacted text contained @EDOC and/or @EATTACH tokens for files that did not exist. (26315)
- Fixed the issue where, after creating a production set, redactions were being discarded on all pages after page 10. (28675)
- Fixed the issue where production sets were not always created after upgrading the system from a 4.1.2 version to a 5.0 version. (27785)
- Fixed the issue where exporting a custom radio file to a DII file would cause the content to appear as numbers instead of readable text. (26812)

Data Sources

- Fixed an issue where the job wizard screen may appear blank after adding data to a case. (24352)

5.0.1 Known Issues

The following are known issues for this release.

For information about known issues in previous releases, see [5.0 Known Issues](#) (page 35).

Installation

- Install may not update the "c:\inetpub\wwwroot\AsyncProcessingServices\Web.Config" file with the correct Local Host.
Workaround: Manually update the "AsyncProcessingServices\Web.Config" file with the correct Local Host. Please see your Technical Account Manager for assistance. (26058)

Summation Express

- Upgrading Summation Express, 64-bit from 4.1.2 to 5.0 removes the Deduplication and Data Volume Report Download buttons.
Workaround: Add additional data to the existing case and save it. The buttons display correctly in the new case. (23911)

Migration

- Migrating iBlaze and Enterprise cases to Summation removes the Pgcount field (from the iBlaze case) and the NumPages field (from the Enterprise case). (22603)
- Migrating iBlaze and Enterprise cases to Summation displays zero (0) hits in the facets for those cases within Summation. (22155)
- Migrating iBlaze and Enterprise cases to Summation also migrates the iBlaze/Enterprise username associated with the migrated case into Summation. (14376)
- Cases migrated from iBlaze are not being redacted correctly in Summation. (14377)
- When displaying annotations in cases migrated from iBlaze, Summation displays an XML ObjectID error. (25708)

Home

Case Property Cloning

- When using the Case Property Cloning wizard for existing cases, the Target Case menu is not alphabetized. (25432)

Processing and Import

- Users can update EP data using the CSV > Add/Update Option. EP data should be static. (22553)
- Using the Concordance/Relativity import to import a Headerless DAT File with Natives and selecting an OPT image type can leave the Field Mapping dialog blank. (25567)
- The Filename field in a CSV file is not automatically mapped to the ObjectName field. DII imports work correctly. (5903)
- CSV imports fail if one (or more) records do not have a Document ID. (13951)
- Running an EP process on a VM (virtual machine) suffers speed performance issues. (21181)

Review

- You cannot edit the Summary column in the Item List. (22196)
- If you add all possible columns to the Item List, an error will occur and no documents will display in the Item List. (26653)
- When switching from the Item Grid to Conversation View, the Total Items field resets to zero (0) even if there are items in the grid. (10270)

AD Viewer

- When viewing data with external Internet links, the Natural Viewer attempts to connect to those external Internet links. (23283)
- OCR text is not legible in Text view. (17718)
- When an original multipage TIFF record is produced in a single page format, the program does not produce the redacted record. This is also true when an original single page record is produced in a multi page format. (26164)
- The following keyboard shortcuts do not currently work (21151):
 - "The Plus Sign (+): used to zoom in on an imaged document.
 - "The Minus Sign (-): used to zoom out on an imaged document.
 - "Page Up: displays the previous page in a multi-page document.
 - "Page Down: displays the next page in a multi-page document.

Case Explorer

- In the File Category Facet under Archives, "Zip" is displayed twice. (22350)
- Changing the color of an existing note does not update that color in AD Viewer. (18317)
- Creating two (or more) Review sets with the same label displays too many records in the Mass Operations menu. (16734)
- Non-Administrator Users with permission to view Labels, Issues, and Categories cannot see these items in the Facet Tags. (22179)
- The Notes filter in Case Explorer does not display documents containing Notes. (18323)
- Authors imported using an Import load or from a CSV file are not displayed in Facets. (5899)

Panels

- Exhibit links do not support multiple lines in the Text-to-Link field. The text entered is not hyper-linked. (10768)
- Adding a document or Transcript link in the Popup View that resides on a dual monitor does not create that link in the application. (9228, 18814)
- The Activity panel displays a blank username for activities performed by the Administrator. (5858)

Global Replace

- The Total Processed Document Count when performing a global replace is displaying the total document count and not the count of the documents in the search results. (21856)
- CustomDate fields are incorrectly updated when performing a global replace that includes the DepositionDate field and the CustomDate fields. (22358)

Export

- Having “localhost” in the Export path does not work in some distributed environments. (22202)
Workaround: Do not allow the term “localhost” in the Export path when creating an Export Set.
- The error “No image was generated for object xx, object ID xxx.” appears after opening a CSV file that was in an export set, even though images generate correctly for the export set. (26087)
- For some xls files, the produced native file does not load in the viewer and filtered text is not generated correctly. However, the export native folder will still contain the xls file. (29155)
- The Language field does not display for Production sets, Export sets, and in the Export > Fields to Include window. (19020)
- The Source field is missing from ProductionSetExport field list. (25588)
- PowerPoint files (*.PPTX) embedded in an MSG file that are imaged, redacted, and included in a production set are exported in their native format and not in PDF. The MSG file with the embedded *.PPTX file is also being exported in its native format and not in PDF. (21601)
- A Load File Export on a large amount of documents (2,000-plus) may take an unreasonable amount of time. (25607)
- The Original Filename and Original Filepath options for Production Sets and Export Sets are not working on files that were initially imported into a case. (25051)
- When a Production Set is deleted, not all native files associated with that Production Set are removed from the Native Case folder. (20406)
- Users with limited permissions can view all Production Sets, even those to which they do not have permissions, in the Printing/Export > Production History window. They can also download reports and export Production Sets for which they have no permissions. (15848)
- If you edit the File and Folder Limits when creating a Production set, the Summary page does not display the changes correctly. (18906)
- You can currently edit documents that are part of a Production Set from the Item List grid. (14355)

Search

- Performing a search query with more than one regular expression causes the hit highlight to fail. (26140)
- In the Advanced Search builder, English Ireland date formats are changed to English US when the Day (dd) value is less than 12. (13514)
- Renaming a saved search creates a new search and does not remove the old search. (14271)
- Duplicate documents appear in search reports regardless of the Show Duplicates quick filter setting. (12984)
- When a Fulltext or All Fields query is combined with an Image Exists/Fails query, the search does not return any results. (28780)
- When using the Boolean term "W/x", the program does not highlight the search hits in the Natural Viewer. (21796)

Transcripts

- Updating a saved Real-Time Transcript displays an "out of sync" alert message. (22423)
- From copied cases, the Upload Transcript option is not available on the right-click menu. (22000)
- If you select only third-level issues in the Transcript Report View, those issues do not display in the generated report. (24954)

Imaging

- When creating Production or Export sets with the watermark font set to 12 points, the header may be partially cut off. (25579)
Workaround: If the header is partially cut off, create the set again and adjust the font size to a smaller font size.
- Watermarks are not displaying for PDFs in the Rendered Images folder. (5890)
- When using Bulk Imaging with the Multipage option, the program displays the **Create Image** option even after the image is created. (26170)

Bulk Printing

- Documents that have been sent to the printer via a networking bulk printing job will not appear in Microsoft's printer queue. (26077)

Bulk Coding

- If a custom field's "Read Only" properties are edited, those edits are not reflected in the coding layouts. (11117)
- A bulk coding job will fail if user un-assign coding values for issues and categories, selects notes for bulk coding, and selects the 'Include Family' option. (10156)

Copy Case

- After copying a case from a network drive to a local drive, and restarting the Copy Case utility, you will get the error, "Mobile Username or password is incorrect" if you strike the **Enter** key after entering the network and mobile credentials.
Workaround: Use the mouse to click the Enter button.

FTK Compatibility

- Clicking an existing FTK case in Summation may generate an exception error. (22947)

Comments?

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

Summation 5.0 Release Notes

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Introduction

This document lists the new and improved features, known issues, and fixed issues for AccessData Summation 5.0. Please be aware that all known issues published under previous release notes still apply until they are listed under “Fixed Issues.”

For information about additional previous releases, see the AccessData website at <http://accessdata.com/>.

Important Information

- The native viewer has been upgraded. In order to view native files, you will need to install the latest version of the native viewer. At the log in screen, you are prompted to install the latest version of the AD Native Viewer. Selecting this option will uninstall your previous native viewer and install the updated version of the viewer.
- Actions taken within Review, such as bulk coding, bulk labeling, and so on, will re-index so that your subsequent searches are accurate with the newly updated values. During re-indexing, other jobs within the case may perform slower than normal. You can monitor the re-indexing status from the Case Details screen for your case.
- Please see the *Database Configuration and Best Practices Guide* for information on configuring and optimizing your database.

5.0 New and Improved Features

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

General Enhancements

Database Enhancements

Summation now supports Microsoft SQL 2012.

Security Enhancements

The web interface now only uses HTTPS protocol to ensure that your data is encrypted.

Performance Enhancements

- Search performance has been significantly improved due to changes in the way that data is indexed and searched, particularly when searching with longer queries containing multiple connectors for values that exist in the database and file content.
- Search performance has been increased when multiple users are executing searches at the exact same time.

Note: When upgrading from 4.x, in order to utilize these improvements, your existing cases must be re-indexed. You can perform this re-index function while upgrading your software or you can perform this function on a case by case basis. If you choose to not re-index while upgrading your software, you will be prompted to do so from the case Home page.

- Improved performance for concurrent operations in multi-user scenarios particularly for facets and column level filters.
- Document to document navigation in the item grid has been vastly improved. Documents are now cached to improve load time. Also, the next item in the list is now pre-loaded so you can navigate down the list quickly.
- A Processing Priority Configuration has been added. This allows you to throttle CPU utilization between medium and high to reduce potential impact to review performance experience during processing and loading.

Concordance Migration

You can now migrate data from cases in Concordance to Summation. You can migrate data and metadata, as well as linked images and documents that are associated with the Concordance database using the Summation migration tool. See the *User Guide* for more information.

Export Data to CSV from Main Application

You can now export any data that is posted to a list in the program as a CSV file with the ability to choose which columns. Lists available to export include, but are not limited to:

- Case List

- Custodians
- Evidence
- Data Sources

Back up and Restore

- You can now back up and restore your case. This feature will allow you to back up a case and store it until you need it at a later date. You can later restore a case and pick up right where you left off. This is available as part of the Summation utilities.

Home Page

Case Property Cloning

You can now clone the properties of an existing case to another case. You can apply existing properties to a new case as you create it, or you can pick and choose properties from individual cases and apply them to a single existing case.

Note: The case data is not copied from one case to another. Only the case properties are copied.

Properties that you can apply from one case to another include:

- Custom Fields including Category and Issue values
- Tagging Layouts
- Labels
- Users and Groups
- Markup Sets
- Custodians
- Highlight Profiles

Data Sources

Custodians

New custodian features improve workflow and functionality. Enhancements to custodians include:

- Associating the custodian to external evidence that allows you to track which custodian is responsible for the external evidence.
- Filtering which custodians are displayed, allowing you to find more easily the custodians that you are looking for.
- Associating custodians that exist globally to a case, allowing you to use the associated global custodians within a particular case.
- Removing a custodian from being associated with a case. If you make an error in associating a custodian to a case, you can easily correct the error.
- Evidence Processing
- You can add, edit, and delete custodians from this tab.
- Custodians can be imported via a CSV file, or be imported from Active Directory.

- Add Custom Properties to the custodians, and export the list to a CSV file.
- View the evidence and cases associated with the custodians.

Evidence Processing

New Processing Options to Expand Embedded Graphics

During processing, you can now expand embedded graphics in data. If this option is selected, embedded graphics in email and documents become individual child items of the parent.

Import

Load file importing enhancements include:

- Support for importing .OPT and .LFP files along with .DAT files in one quick step. When importing a .DAT and .OPT or a .DAT and .LFP combination, your native, image, and text files will be associated with the imported items. This eliminates the need to convert these formats to a DII prior to importing.
- Associate images to existing records using .LFP or .OPT load files.
- Update existing or add additional metadata using .DAT load files.

Review

Predictive Coding

You now have the ability to automatically code documents by applying Predictive Coding to the document set. With Predictive Coding, the system can "learn" how you want certain documents coded and apply that coding to future documents. This allows you to automatically code documents throughout the legal matter. As the system learns coding methodology, the system's overall confidence level increases. This tells you how confident the system is in learning how future documents should be coded. Once you have reached an acceptable confidence score with the predictive coding, you can apply the predictive coding to the rest of the documents within the legal matter.

With Predictive Coding, you can do the following:

- Define the set of documents that are used in the learning session by filter, facets, search results, or selected items in the current list.
- Have the option to display a list of the documents in the random sample set that is being tagged and/or coded.
- Automatically navigate to the next document after saving your current document's tag and code settings.
- Apply the same coding set to a document that you had used on the previous coding set. You can apply the coding set with one click. This allows you to move quickly between documents as you are coding them.
- View the logic that determines how a document was coded in a particular way with the predictive coding. This ensures that the coding is defensible in court.
- Apply predictive coding to the documents without overriding any previously manually-coded information.
- Identify whether the document was coded manually or by predictive coding.

Note: Due to the conjecturable nature of predictive coding, any results from the predictive coding should be considered an estimate and is not guaranteed to produce 100% accurate results. All results from predictive coding should be verified against the data set.

Enhanced Natural Viewer

There is now a built-in viewer called the AD Viewer. Along with it, several enhancements and workflows have been upgraded.

- The Edit/Annotate mode of the viewer now supports these features:
 - Apply reasons for redactions to the document.
 - Added ability to get text out of redacted documents without running OCR on them
 - Zoom in or out of the document,
 - Navigate to a specific page, and page through the document.
 - Rotate the document or rotate the individual pages within the document.
 - Search keywords and phrases within the document and navigate from one hit to another.
 - Choose from a variety of views to examine the documents, such as thumbnails and fit to page.
 - The View mode of the viewer has also been updated to support more file formats.

Note: The following file types are not displayed in Natural view in Review: PST, NSF, TAR, JAR, GZIP, RAR, 7ZIP, ZIP, ZIPX, E01, L01, EX01, AD1, DBX, DD, and DMG. Also, files over 50 MB are not displayed. These files can be downloaded.

Realtime Transcript Recording

You can now connect to a court reporter's stenographer system that is transcribing in real-time and capture the transcript as it is being entered. This allows you to:

- Place Quick Marks on the real-time transcripts.
- Create links on the transcripts during the real-time session.
- Search the testimony of the real-time transcript while the feed is active.

Enhanced Transcript Reporting

Transcript reporting has been updated to give you more robust options.

- You can filter on issues in transcripts in Case Explorer and update a report with the filtered issues.
- You can create a report on issues that span multiple transcriptions.

Global Replace

You can now search and replace keywords, phrases, and other character strings within the database fields of all the files in a case through mass action button.

Facets

New facets have been added for improved filtering on items. The facets added are:

- Tags (Labels, Categories, and Issues)
- File by Date Ranges
- Email by Date Ranges

Bulk Coding

- Bulk coding performance has been improved.
- Enhanced error reporting. You can now view a report from the *Work List* that shows the DocIDs which failed during a *Bulk Coding* operation.

Bulk Printing

- Branding is now available during Bulk Printing. When you initiate a bulk printing job, you have the option to brand the printed pages. If you choose to brand you can select from a myriad of options on what to brand and up to seven different locations in which to place the brand.
- There is a new option under the mass action button for Local Bulk Print. This allows you to select any number of documents from your list and print them to a locally installed printer or virtual printer such as a PDF creation tool. This requires the installation of AccessData's Local Print software. When you submit a Local Print job you can select which printer to use and whether or not to brand the pages.

Email Threading

In the conversation panel of Review, emails are now organized in a hierarchy based on information contained in the email headers, such as date, subject, from, to, cc, and bcc, even when the conversation ID information is missing.

Performance Improvements

- Bulk Deleting has been improved, allowing for faster deletion of imported items.

Visualization

The visualization module lets you view data in multiple display formats, including time lines, cluster graphs, pie charts and more. This functionality lets you quickly determine relationships and visually cull the data.

- File and Email Visualization - Lets you interact with data within your case in a timeline view. Using Visualization, you can identify gaps, filter down to certain times periods, and drill down into what's important to you and then select those documents or email. Once selected, you can post these documents back to your review grid for further analysis or quick culling.
- Social Analyzer - The Social Analyzer Visualization lets you see the big picture of email communication across the entire or filtered dataset. You can multi-select and drill-down into specific domains to see individual email addresses and who the communicated with in other domains. This feature provides a more interactive way to view email communication and cull data based off of domain and emails of interest. It allows you to post your findings back to the grid for further analysis or quick culling.

Production Sets and Exports

Production Set and Export features have been enhanced, allowing you greater flexibility and more options when creating production sets and exporting documents. Some of the general enhancements in this area are:

- Delete unused Production or Export Sets.
- Export data into a Ringtail MDB format.
- Regenerate load files without the need to re-export data.
- Include previously generated export DocID information on load files for cross reference.
- Ability to Select and use custom slipsheets for documents that are not converted during production and export. This allows you to have a more meaningful slipsheet per production and export set than the generic default.
- When creating a Production Set, if you select to include text files, and have redacted natives in your production set, you will now get a redacted text file associated to that native.
- New export stability enhancements:
 - Cancel a running production set or export.
 - Retry an unresponsive production set or export.
 - View the export progress and export history in real time.

In addition to these general enhancements, you can now export documents without having to set up a production set for them. This allows you to do the following:

- Export as Native files, Loadfile, or AD1.
- Set up export templates so you can quickly export data in the standard that you want.
- Include rendered and redacted images.
- Brand Images using a variety of the fields available.

FTK Compatibility

Forensic Toolkit (FTK) and Summation or eDiscovery users can work collaboratively -- accessing the same case data on the same database to perform legal review and forensic examination simultaneously. Some of the key points of this compatibility are listed below. For more information, see the *FTK Compatibility* chapter of the *Summation User Guide*.

- Open a case
- Backup and restore a case
- Add and remove evidence
- Perform Additional Analysis
- Search and Index data
- Export data
- Label items

5.0 Fixed Issues

The following issues have been resolved for this release:

General

Migration

- Fixed a issue that occurred when a user migrated a case from iBlaze. If the "DEFDIR" field was coded with (lower case)"@i", the @i character was ignored but added as part of the image path instead. Example: \\<Casedir>\@i\sample.jpg. Now, a case with @i in the "DEFDIR" field will migrate without an error. (15407)
- Fixed the issue that occurred when migrating a iBlaze/Enterprise case containing Exhibits that would cause it to crash. (18257)
- Fixed an issue where some facets were not populating cases when data was migrated from iBlaze. (10593)

Installation

- Fixed the issue where errors were created on the application server running AccessData Services. (23270)

Home Page

- The Case Reviewer role is now the Admin Reviewer role. Admin Reviewers are able to view documents before they are placed in document groups. Admin Reviewers are also able to view document groups. Firms wishing to restrict access to documents can do so by not choosing the Admin Reviewer role and creating document groups to limit what their reviewers see. (14647)
- Fixed the issue where a negative number was displaying in the Elapsed Time field in the Production Set History. (13618)
- Performance changes have been made to the program, so that the Case List will load much more quickly. However, for jobs with small data sets, you may notice a small delay (i.e., two minutes) for the Processing status to synch correctly with the actual job processing. (21051) (14224)
- Fixed the issue where errors would occur when trying to create case and admin roles after upgrading the software. (9954)

Processing and Imaging

- When data is processed for OCR, only TIFF and PDF files will have OCR applied to them. (11042)
- Fixed the issue where processing evidence failed to extract embedded objects from Office 2003 documents. (9605)
- The display for the job status now takes into account failed targets and will calculate the percentages displayed accurately. (4294)
- Refinement options in processing have been upgraded to exclude unwanted streams. (16934)
- Reduced memory usage spikes that occurred when processing OCR files. (18252)
- You can now convert a JPG file that was converted from an XLSX file into a graphic SWF file without issues. (11409)

- You can now create graphic SWF files from LZW compressed TIFs. (10912)
- Formatting for OCR documents has been improved. (18101)

Reports

Corrected the deduplication information on the Data Volume report so that it only displays the actual count of the emails. (11097)

Review

- The hit count is now always visible when performing next/previous searches on a document. (13741)
- Improved the speed in which images in the *Natural* and *Image* tabs load in *Case Review*. (18984)
- You can now place annotations on both Native and Image files for a record. (13882)
- XML links will point to the correct URL information. (15024)
- The program's interface will take no more than a second to update when switching between Markup Sets with annotations and Markup Sets without annotations. (15025)
- The function of Hide/Show redactions works properly for redactions. (15035)
- The image tab now refreshes when a user navigates between documents when not in a Markup Set. (5921)
- Annotations will load in either the Natural or the Image view without causing an error. (7558)
- Redactions are now saving properly. (11325)
- You can now manually save annotations by clicking the **Save Annotations** button. (12505)
- It is now easier to delete newly-created highlights. (61895)
- *Redaction Reasons* has been made easier to read on documents with high resolution. (18465)
- The INSO load time in the Viewer has been improved. (18960)
- Fixed the issue where TIFF images with JPEG compression failed to load via a DII file. (13561)
- Fixed the issue where an extra extraction was placed on a PDF file when "Auto rotate and center" setting was checked. (17525)
- Fixed an issue with the Create Note dialog, so that the Save button now works correctly in the Create Note dialog. (9250)
- Fixed the issue where the Family Panel for a transcript record was displaying exhibits associated to the transcript. (9427)
- When an import is performed with a load file that has no associated native files, there will be no files displayed in the Natural, Text, and Image viewers to confuse the reviewer. (18870)
- Fixed the issue where folders were not displaying when the Show Folders option was selected in Quick Filters but would display if the Show eDiscovery refinement option is enabled. (19149)
- Fixed the issue where an attached PDF did not load in the Natural view. (18158)
- The viewer now displays SWF files correctly. (19127)
- Fixed the issue where some PDFs were not displaying correctly in the viewer. (20438) (21948)
- Fixed the issue where an error occurred when a MPP file is selected. (20486)
- Fixed the issue where opening an EXLM document in Review caused an error. (23986)
- You can now redact text with double quotes. (24222)

Export

- The MD5Hash is now available for export or for a Production Set. (14530)
- The **Issues** Field is now available in the Field branding options for production set export and export set field list. (20262)
- Line feeds and carriage returns have been eliminated from the Author field. This allows the user to import into a CaseVantage DII file or other load file format without issue. (7791)
- If both OCR and DII text options are selected when exporting, the OCR text file will load back into the system along with the DII file. (17920)
- When only OCR text option is selected for a load file for an export, the DII file will contain @FULLTEXT tokens that point to the text files in the text folder. (18003)
- Fixed the issue where the headers of emails exported to a load file were being truncated to approximately 5000 characters in length. The full email header is now included in the load file. (7253)
- Fixed the issue where the DocID, Summary, and ObjectName fields were missing from the Production Set "Columns to Include" fields list when creating a Production Set. (18161)
- Fixed the issue where a "Native Only" production set with markup failed to produce any Native files. (13760)
- Added several fields to the Export/Production set select fields list: IMPORTANCE, SENSITIVITY, CNV_TOPIC, CNV_INDEX, and LASTAUTHOR. (14529)
- Fixed the issue where an exported Summation DII file contained children documents that had an @attach token on them. The export now shows only two levels: the parent and all of the children, regardless or whether not the child is a child of a child. (7595)
- Corrected an issue that was causing load files to export incorrectly. (9441)
- Fixed the issue where an email loaded from an import file was not rendering properly during a Production Set creation. (12280)
- You can now apply templates for Load File exports. (24094)
- You can now produce and export XLSX and PPT records with redactions. (22782)

Bulk Coding

- Fixed the issue where bulk coding jobs with large sets of documents were failing to code all of the documents in the job. (8575)
- You can now complete a Bulk Coding job with a large set of documents (1000+) that includes production set records. (10994)

Bulk Printing

Non Case Admin Users can now access Bulk Printing. In order to access Bulk Printing, a user must be given an Imaging permission. (23772)

Bulk Labeling

You can now complete a Bulk Labeling job with a large set of documents (1000+) that includes production set records. (10994)

Facets

- Fixed an issue where the **Expand All** option was no longer expanding the facets within the filter groups with the top level filter grouping. (21441)

- Fixed an issue where some facets, including Emails, Files, and Custodians, were not populating when viewed by a Non Admin user with group specific permissions. (19215)

Search

- When a search is performed on phrases and a search report is generated on the results, the report will now display the entire phrase in the report. Complete phrases will appear in the report when selecting Synonyms or Related in Advanced Search. However, if a search is performed on a phrase with either stemming, phonic, wildcards, regular expressions, or fuzzy search, that search phrases are broken down into individual search terms in the report. (8412)
- Search queries with more than one search terms (with multiple words in each search term) enclosed in either single or double quotes will now return results. (13866)
- In the Advanced Search Builder, fixed an issue where an error occurred under the Conditions tab when the user tried to expand a query that was saved with an EXISTS operator during an edit search from the MySearches node. (13805)
- Search is now applying correctly to family documents when “Include Family” is selected. (8231)
- Fixed the issue where a regular expression search was not returning results if the search query had more than one search term. (18371)
- Fixed the issue where a query parser was creating an error when search terms were nested in multiple parentheses. (17837)
- Fixed an issue in search when search was highlighting terms even when they were not in the range when using W/N. Now, if you perform a search, for example, “apple w/2 sauce,” neither term will be highlighted. If you search on “apple w/2 sauce OR pear” only pear will be highlighted. (18000)

5.0 Known Issues

The following are known issues for this release:

General

Upgrade

- Information in the checked boxes in the *Info* tab of *Case Defaults* is not carried over when upgrading to version 5.0 from 4.1.2. (23829)
- If an empty case from 4.1.2 gets upgraded to 5.0, re-indexing doesn’t occur, even when you click the case upgrade button.
- When upgrading either Summation Pro or Summation Express from version 4.1.2 to 5.0, the **Deduplication** and **Data Volume** download buttons will be missing in the existing case. (23911)
Workaround: Add additional data to the existing case. The **Deduplication** and **Data Volume** download buttons will appear.
- Labels in Summation Pro and folders in iBlaze are not migrating when the names of the labels/folders are larger than 50 characters. (14272)
Workaround: Make sure that names of labels and folders are smaller than 50 characters in length.

Installation

- When installing Work Managers, you may get privileges errors. (26190)
Workaround: On the computer where you are installing Work Manager, you will need to disable the Certificate Check. To do this:
 1. Click **Start> Run> Control Panel> Network and Internet**.
 2. Click **Internet Options**.
 3. Click **Advanced Tab> Security Section**.
 4. Deselect the **Check for publisher's certificate revocation** option.
Please consult with support or your TAM for more information.

Home Page

- Filter options in the Case List are case-sensitive. (26192)
Workaround: To ensure correct filtering, make sure to search for cases using both uppercase and lowercase letters in the search terms.

Management

- When creating Choice options in Custom Properties, the first entry on the Choices list will be the default choice and will appear on all cases, custodians, and evidence. If you do not want that first entry to be a default entry, create a blank choice for the first entry by hitting **Enter** before proceeding with the rest of your Choice entries. (18223)
- In Summation Desktop, the Site Server window does not display a version number. (20256)
- In the *Export Set History* tab, the elapsed time displayed is incorrect. (23289)

Evidence Processing

Data Collection and Processing

- When importing data, incomplete email addresses in email metadata fields will not parse correctly. (17833)
Workaround: Make sure that you use a complete email address if you want to use the email facets on imported data.
- When importing a DII Images only file, the Extension, Logical Size, File Path, and Object name are not populated in the database and Item List. However, you can still identify the files by DocID and ObjectID. (18810)
- An error will occur when loading a transcript with the Activity Type tab open. (20552)
- Custodians cannot be imported from the Custodians tab in Create New Case panel. (18712)
Workaround: Import Custodians from the Data Sources tab.

Review

- In the Natural view, SQLite files are not displaying in parsed CoolHTML view. (9704)
- Performing a FULLTEXT fails search will return filtered text emails. (10206)

- When loading SWF files with over ten pages in the Viewer, the pages may load out of order until the document is fully loaded. However, once the document is fully loaded, the document will display the pages in the correct order. (20838)
- When performing an in-document search on a document displayed in a "Fit to Width" file, the found word is not centered when using the navigation buttons. This does not affect the search. (20888)
Workaround: Manually move your viewing pane during the search.
- In Review, you will be unable to navigate to the next page using the vertical bar up/down arrows, after scrolling with the scroll bar. (18245)
- After applying the Email Recipient Facets, Email Related Columns (From, To, BCC, and CC) contain duplicate counts in the Email Recipient Filter Dialog. (23751)
- The Folder facet under the File category will display as zero, even though folders are within the OS/File System Files. (19145)
- A small redaction may appear on the upper left corner of some Native and Graphic SWFs. This redaction only appears on a small number of SWFs and does not obscure any text in the document. (23834)
- If two users are manually coding documents to the **Predictive Coding Layout** in the same case, two different entries for *Manually Coded* will display in the column filter of the SetBy Column. (23439)
- The counts in the filter dialog box of the *Language Column* for a case with the **Language Identification** turned on do not match the counts in the *Item List*. (23809)
- Search highlighting does not work in the Natural view if you use the wildcard character * at the beginning of the search term (for example *nomials). Also, if a query has the wildcard character * at the beginning of one search term and * at the end of another search term (for example, numb* and *nomials), the highlight will not work for either of the two terms. However, using search terms with * in the text panel will return searches with highlights. (23786)
- After performing a search and then applying a facet, if you clear the search, leaving the facet applied, and apply either Bulk Coding or Label Assignment to the data, the Bulk Coding/Label Assignment will apply to only the results of the search and the facet. It does not apply to all of the results. (24305)
- Creating text redactions will sometimes create highlights on the selected text. There might be a single highlight created or multiple highlights that are layered on the document. (24121)
- **Workaround:** Select the highlight and click **Delete**. If there are multiple layers, you must select and delete each highlight.
- Imaged TIFF files from select XLS files will cause an out of memory error to occur in the viewer. (18575)
- When running *Review* on a machine with a Windows 8 operating system, the time to load the view on the Natural and Image tab will take longer than running *Review* on a machine with another operating system. (23778)
- Column Filters (FROM, TO, CC and BCC) in Facets are Blank when a combination of Labels/Issues/ Category Facets are applied on the same "Email documents" only. (23775)
- Switching between Edit and View mode with the Natural and Image Panel side by side does not load properly. (21477)
- You cannot generate Native and Graphic SWF for PUB files. (20614)
- Unicode characters cannot be used in redaction reasons. (21252)
- Switching between two different highlight profiles while in *Edit* mode of *Natural* view will reload all of the pages of the document. (25896)
- There may be some issues with viewing documents in Edit mode of the Viewer after using the scroll bar. (18242) (18244) (18245)
- Fringe dates are not supported for email visualization. Fringe dates are dates that are either time stamped before January 1, 1970 or time stamped for a date that is more than 100 years in the future. (18394)
Workaround: Make sure that you have the correct date entered when using email visualization.

- In an upgraded environment, images with redactions that were loaded via Evidence Processing are not displayed in the viewer. (24109)
- You cannot delete a link to a document in Natural Edit mode. (17923)
Workaround: Delete the link in the Linked Panel.
- A redaction reason with a special character (such as an apostrophe or exclamation point) prompts the user to install Adobe Flash Player, even if Adobe Flash Player is already installed on the machine. (13504)
- SQLite files are not displayed properly in Natural or Image view. (25127)

Export and Production Set

- You might get a validation error if you select **Use Australian Numbering** under Export options, and then de-select Images when creating a production set. This is because the selections you have chosen will not produce a valid production set. The default output for Australian numbering is to have PDF files included. (18902)
Workaround: Make sure that the **Images** option is selected when creating a production set that uses Australian Numbering for export.
- On a produced text file from a text based redaction, the redaction reason is split on multiple lines. (23819)
- When using the field option for branding, you will be unable to brand with DocID. (24161)
- In the Export load files, the values for the Radio and Checkbox fields are numbers instead of values. (20252)
- A record is not produced when there is a redaction on a unique character, such as a bullet point. (25553)
- Emails that have been brought in via an import do not have file extension when they are exported. (24285)
- An error is displayed while applying only the first template for load file exports. The error is only displayed once and the template can be still be applied even though the error is displayed. (25148)
- The names of attachments from emails loaded from an import file will not display during production set creation. (20666)
- Renaming an export set from Review does not change the name of the export set in the Export Set History tab. (17922)
- Each Production and Export creates a unique Custom Column containing the DocID given to an evidence item in that specific set. Including the unique Custom Column given for previous Production and Export DocIDs in a DII load file will only contain the first 36 characters of the name during the set's creation. (24584)
Workaround: Limit the names of Production and Export Sets to 36 characters.

Report

- If a production set is created after evidence is processed, the *Data Volume* report accessed from the **View** button will contain a different total count than the downloadable *Data Volume* report. (23490)
Workaround: Process a single file after the production set. This will insure that the counts from both the *Data Volume Download* report and *Data Volume View* report will match.

Facets

- In Case Explorer, all authors are displayed under the author's facet. If a user does not have access to the document under that Author, clicking on them displays no documents. (19211)
- You cannot create a sublevel item with the same name for multiple label or issue groups. (19199)
- Production sets are included in the Facet counts in the Facet list. (18377)

- When the To, CC, and BCC column Filtering are applied on the Facets Results, no results appear in the Filter Dialog. (10705)
- In order for a user to view a child level of facets in the Facet tab, that user must have permission to view the children level. If not, the Facet categories will not display correctly. If a user has permission to view parents, it does not mean that the user has permission to view the children. (17721)

Bulk Printing

- The program will not warn you if your printer is not ready or is out of paper when attempting to print to a local printer. (25557)
- If you start another local print job when the dialog window from a previous Local Bulk Printing job is already open, a new Bulk Printing window will appear. (25344)
Workaround: Close the initial Local Bulk Print window before starting a new local print job. Report
- The Printer Status tab does not automatically refresh while local bulk print jobs are running. (25333)
Workaround: Click the browser's refresh button to refresh the status of the print job in the Printer Status tab.

Bulk Coding

- Bulk and Single coding jobs currently display as blank activity types in the activity panel. (18991)
- When more than 100 documents are selected for either a Bulk Coding or Global Replace job, an incorrect error count may display in the Worklist. (20564)

Realtime Transcripts

Quick Notes made in a Realtime Transcript are not indicated in the Primary Transcript Panel in Review. (21745)

Workaround: Refresh the Review tab and select the transcript in the Item List a second time. The Quick Notes should appear.

Forensic Toolkit (FTK) and Summation Compatibility:

- The same documents may be displayed differently in the Natural Views of each product. (23084)
- The search results counts for the same case may be different when viewed in the different products due to the way search options are executed in the respective products. (23005)
- If using Summation or eDiscovery to add evidence to a case that was created in FTK, search does not return results from the new data. (23006) You can do one of the following as a workaround for this issue:
 - Add new evidence to a case using the same application that was used to add the original evidence.
 - After adding the new evidence using eDiscovery or Summation, add either a label or a code to the new data which will cause the new data to be re-indexed.
- If using Summation or eDiscovery to add evidence to a case that was created in FTK, the Processing and Indexing counts may be different due to different processing options. (22945)
- Attempting to view an FTK case in Summation or eDiscovery may sometimes cause an exception error message. (22947)
- The processing options applied to a case are different from which ever product the case is created in. For example, you may create a case in eDiscovery, process the evidence, and then add more evidence using FTK. If you compare the JobInformation.log files, the processing options applied by FTK are different from eDiscovery. (17186)

- An administrator must give an FTK created user Admin Reviewer rights in Summation in order for that user to use the Review feature in Summation. (24101)

Comments?

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