Summation 5.6.3 Release Notes

Document Date: 3/02/2015

Introduction

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

New and Improved Features

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

Litigation Hold

The Litigation Hold feature, which has been a component of the eDiscovery product, is now a feature in Summation.

Litigation Hold system is a notification management system that efficiently handles all aspects and stages of the litigation hold process within your enterprise. The Litigation Hold offers email notification templates and interview question templates, reports, histories, reminders, acceptance records, interview response records, and centralizes the relevant data in one location.

Dashboard

In conjunction with Litigation Hold, the Dashboard is now a feature in Summation. The Dashboard contains a widget that lets you do the following:

- View the top Lit Holds assigned to people.
- View the days pending approval for top people.
- View the days pending approval.
- View the status of all holds.
- View the Lit Holds assigned to the top IT staff.

Home

Default Sort Order

- You can now set the default column that you wan to sort by when opening *Project Review*.
  - You select the default column name and then select the default sorting oder: ascending or descending.
  - You can set the default column at the following times:
    - When creating the project
    - After the project has been created on the *Project Details* pane
  - The setting is project-specific and not user specific.
  - In *Review*, you can still click any column to sort on

Custom Fields

- Duplicate Custom Fields Name Prevention

  When creating a custom field, the application will now prevent you from using the name of an existing field.

Review

Item List

- Field character limit

  By default, the number of characters that display for a field in the *Item List* and *Coding Panel* is limited to 512 characters. Additional characters are truncated.

  For the *Item List* only, you can modify the number of characters displayed before truncating. You can set the value using the new "FieldTruncationSize" value in the web.config file. You can set a limit value or turn off the limit by using a value of 0. This only applies to the *Item List*. The *Coding Panel* maintains the 512 character limit.

Branding

- Improved Branding

  Branding results are more consistent across all document types.

5.6.2 Fixed Issues

The following have been fixed in this release:

System

Upgrade

- The EP Processing Temp Folder registry key is now being persisted during upgrade. (27039)

DBConfig

- When using the DBConfig *FixSequences* option, it no longer generates an error message "Length cannot be less than zero. Parameter name: length." (26584)
- When installed with Summation, the DBConfig uses the AccessData default password as the default password for Authentication Mode. (27192)

Localization

- Search functions are performing correctly in localized environment. (27011)
- The Processing Options tooltips can now be displayed in Chinese. (26022)
- Several UI elements can now be displayed in Chinese. (26023, 27501)
- The sub-text for the System Configuration buttons can now be displayed in Chinese. (26023)
- General translations errors have been corrected. (27487, 27491, 27492)

Home

Project Creation

- When creating a project, the option to set the Display Time Zone appears properly. (26471)

Import

- When importing data from a loadfile, if there are parent records without a matching child record, the import concludes by skipping those records and recording in the log that those items were skipped. (26858)

Review

Production Sets/Exports

- Native SWF files generated from redacted and produced records no longer shows branding. Only images have branding. (25856)
- When creating an export set with TIFF imaging and branding, slipsheets are created correctly for email attachments. (26017)
- When creating a Load File Export, DocDates are exported correctly. (10787)
- When creating a Load File Export or Production Set, the Recipients field is now available to include. (17985)
- The status of a Production, Export, or Print job appear faster in the Export tab of the user interface. (14195)
- Export Sets created by a user that has since been deleted appear correctly. The userID of the deleted user is also displayed. (26885)
- The Bates number on the bottom right of produced records is a normal size. (27302)
- When creating a Production Set and selecting custom fields on different branding locations for image branding, all numbers are branded onto selected branded locations for records that have values for custom fields. (25273)
- Load Files are successfully created when a Load File Name has special characters. (26303)
- Duplicate copies of PST files are not being saved in the Temp folder that could result in overloading a system. (27652)
- When processing an MBOX and exporting emails, the exported documents now include the .EML extension. (27707)
- The *Select* and C*ancel* buttons on *Browse* dialog for the path to export production sets display properly. (27844)

Natural Viewer

- Some email messages are no longer truncated to 255 characters in the Natural Viewer. (19975)

Document Groups

- DocIDs are assigned based on ObjectIDs. (22473)

Facets

- In large projects, expanding the File Category facet category populates much faster. (21112)

Search

- After performing a search, the Standard Viewer properly displays red icons that indicate search results. (25898)

Unitization

- You can successfully move pages from one document to another. (27012)
- You can successfully unitize large document files with freezing the browser. (23399)

Imaging and Branding

- Branding is completed without duplication. (26882, 23240)
- On large data sets, branding is successful across all pages. (25956)

Transcripts

- The Transcript viewer properly opens and displays transcript links. (26409)
- Video transcripts sync correctly with the text of the transcript. (26476)
- Transcript reports are generated successfully after upgrading from Summation 5.2.2. (26442)

Case Organizer

- Case Organizer types and items now appear in the *Tag* view for non-administrator users. (28066)
- The Case Organizer displays correctly using the Windows Australian region. (27180)

Migration and Copy Case

- TIFF and graphic SWF files are correctly merged when a case is copied. (13083)
- Migration from AD Enterprise no longer fails under the following circumstances:
  - When the HtmlBody column does not exist. (27437)
  - When there are duplicate DocIDs. (27603)
  - When there is data truncation in cvg_ObjectsReview (27006)
- Migration from AD Enterprise properly displays redactions (27499)

Important Information

General

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

Requirements

- For general software and hardware requirements, see
  http://accessdata.com/solutions/e-discovery/summation/technical

Upgrade

- When the application is upgraded, the Enabled Standard Viewer Processing Option is turned off because it is a slower performing processing option. If you want this functionality, you need to enable it manually in **System Configuration** > **Project Defaults** > **Processing Options**.

- If upgrading to 5.6, we recommend upgrading SiteServer from the previous PostgreSQL 9.1.11 to 9.3.5 (which is included in the ISO). The 9.1.11 version will function, but in the console, child site servers will appear in a yellow error state. (15980)

- When upgrading to version 5.6, and when upgrading Site Server to use the latest version of PostgreSQL, you must first wait for all of your Site Server jobs to clear, then you can un-install and re-install PostgreSQL.

5.6.2 Known Issues

The following are the Known Issues for this release:

Review

Transcripts

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Search

- When clicking **Previous Search** after running more than one subset searches it does not run the correct subset search. (21667)

Production Sets \ Export

- When placing a coordinate-based redaction, and extending it to the full page, the produced PDF may have embedded text behind the redaction that can be copied and pasted from the PDF. (27227)

Processing

- When processing a corrupt PST, the job log should report that it was "Completed With Errors". No error is currently reported. (24368)

Comments?

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