

Summation Express Install Guide

Introduction

Please review the specification guide for hardware requirements and other prerequisites.

This guide will provide steps for:

- Installing Licensing software (CodeMeter and License Manager).
- Installing Summation Express.

Summation Express should only be installed on one machine, whether the machine is running Windows 7 or Windows Server 2008. Before installing Summation Express on a server or a workstation, please consider that:

- Summation Express should be installed to the workstation that will function as the Evidence Processing computer.
- The Summation Express workstation will also be the web server for other workstations. Other workstations will connect, via Internet Explorer, to the Summation Express website.

Before installing Summation Express to a workstation or server, please do the following to the same machine where Summation Express will be installed.

- Install CodeMeter Runtime
- Install License Manager
- Run License Manager and activate your Summation Express license

Note: In addition, the Summation Express machine should also have Microsoft Outlook 2007 installed to it. Microsoft Outlook 2007 is used for Production Sets when exporting to MSG and PST formats.

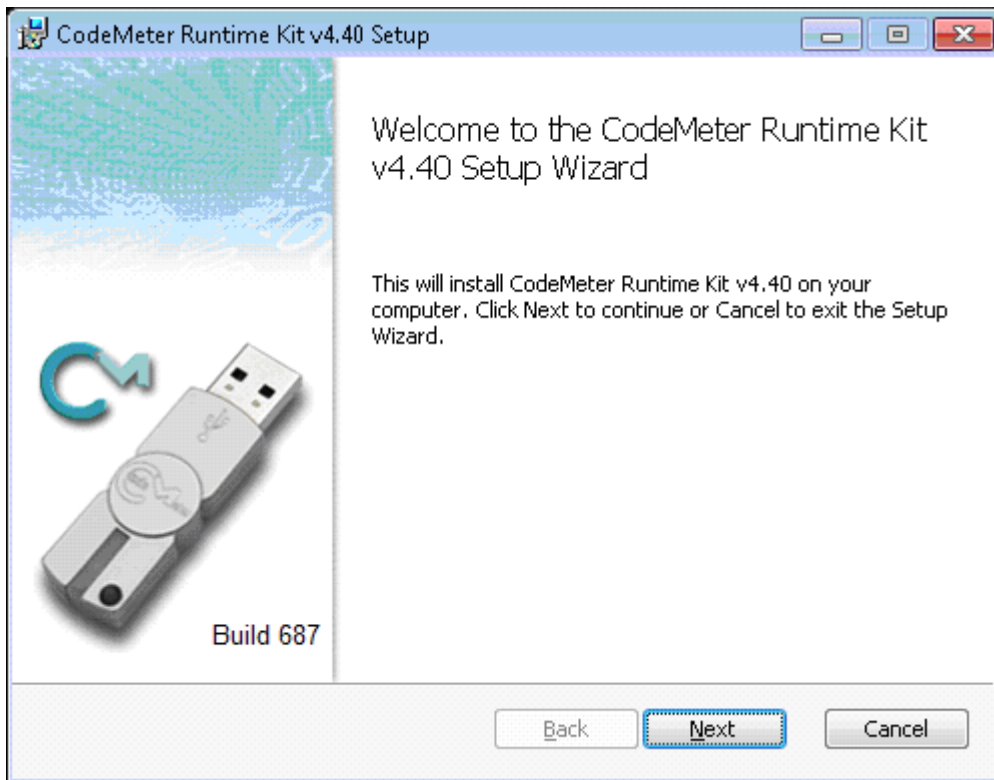
Installing Codemeter

Download “CodeMeter Runtime 4.4.0 (64 bit)” from: <http://accessdata.com/support/adownloads>

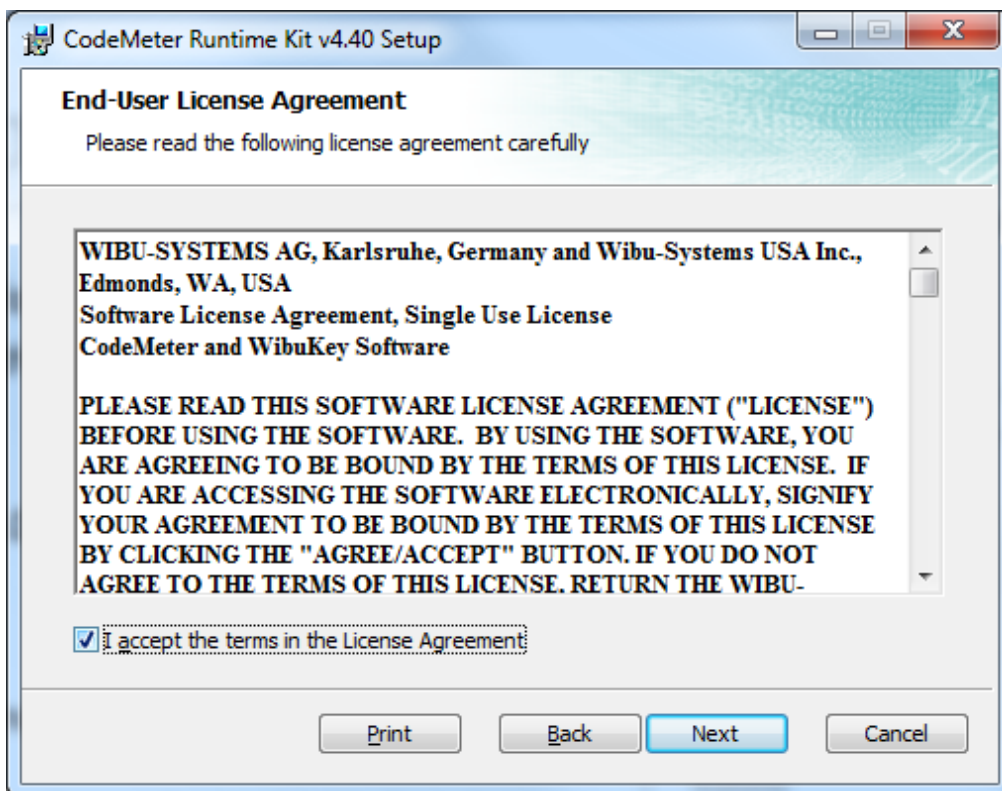
Here is the download for 64-bit computers:

http://accessdata.com/downloads/current_releases/downloads_page/CodeMeterRuntime64_440.exe

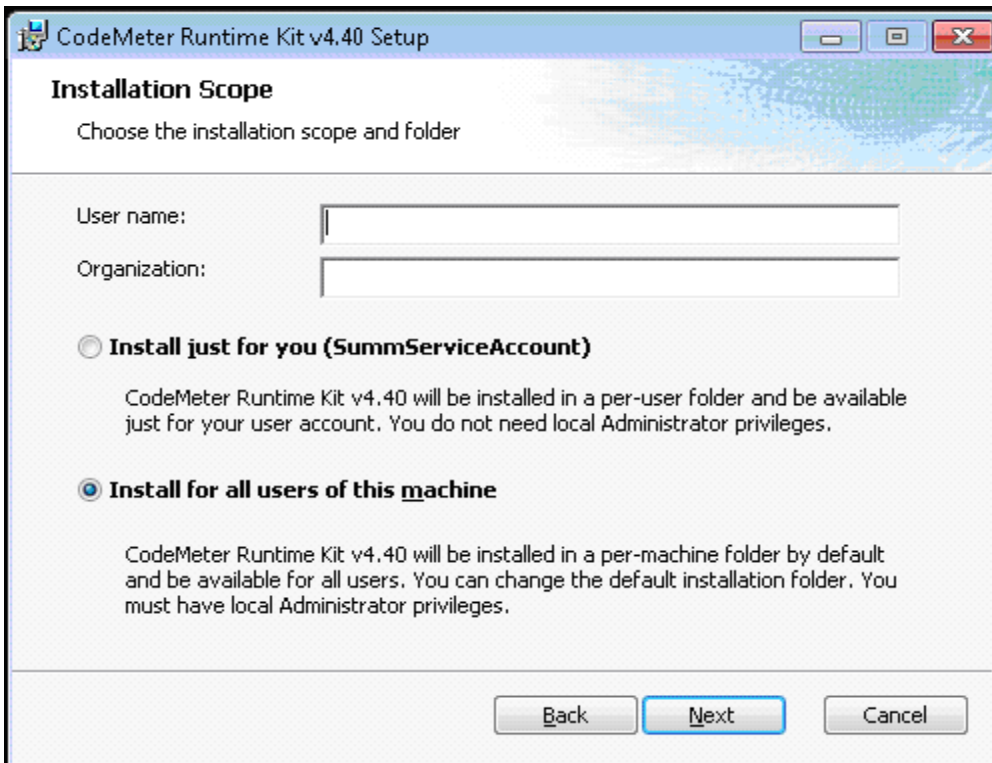
1) Run the “CodeMeterRuntime64_440.exe” file and click **Next**.



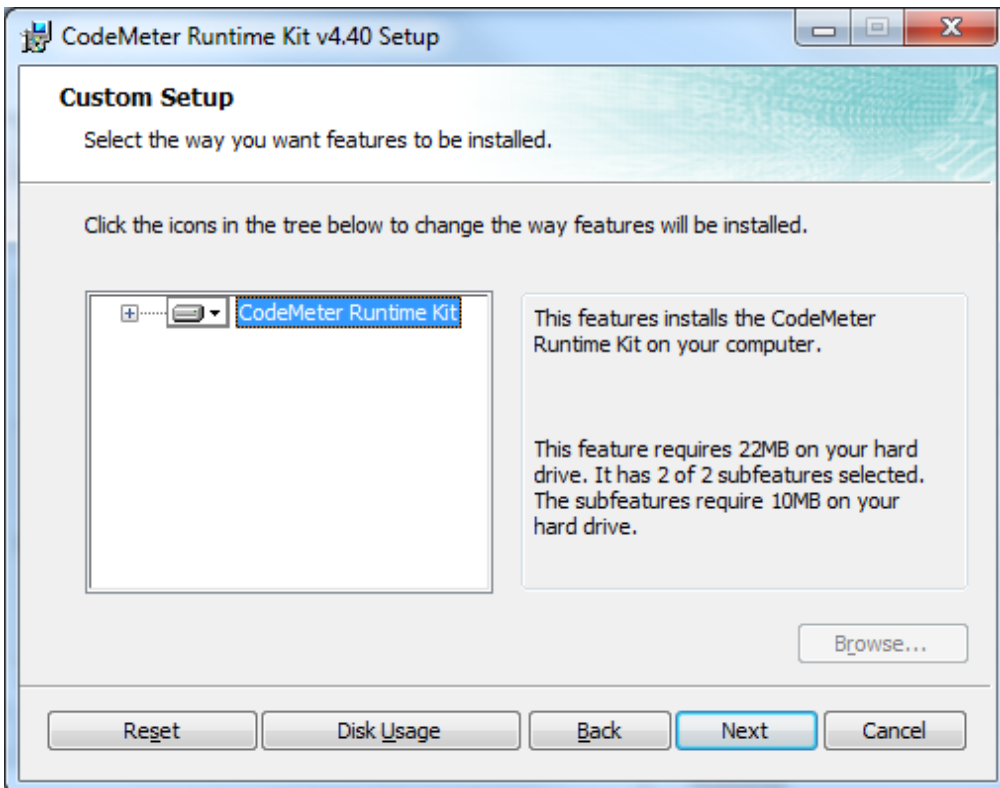
2) Review and Accept the license agreement and click **Next**.



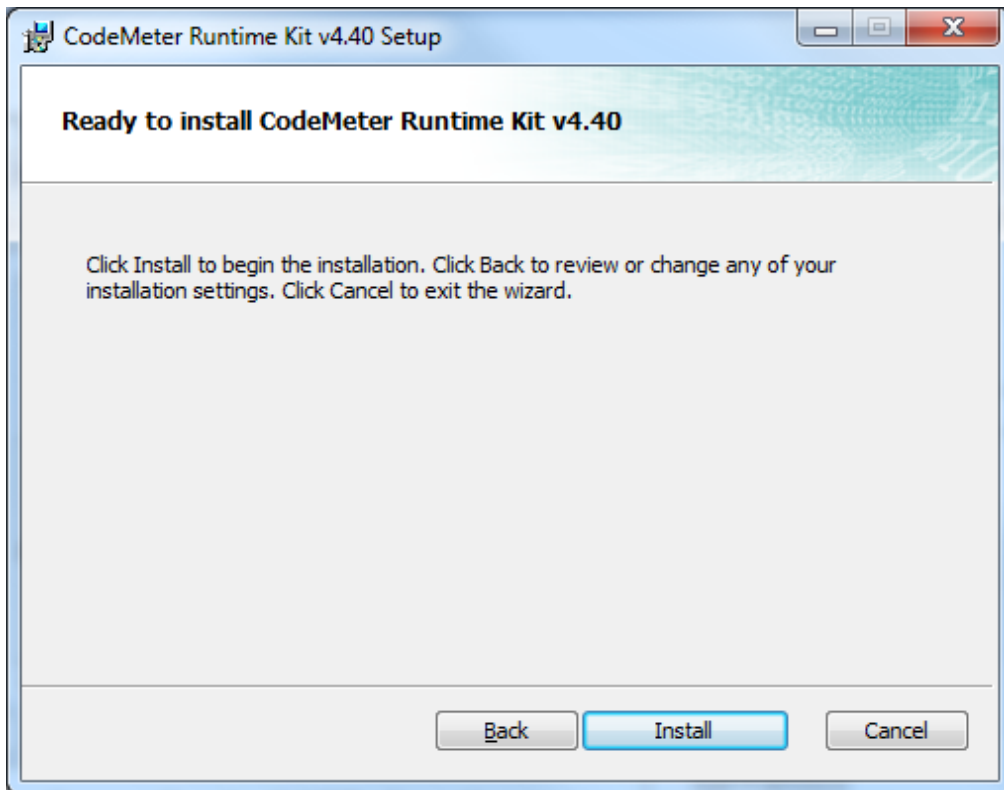
3) On the *Installation Scope* dialog, fill-in the Username and Organization information and click **Next**. It is recommended that you keep the default option of "Install for all users of this machine."



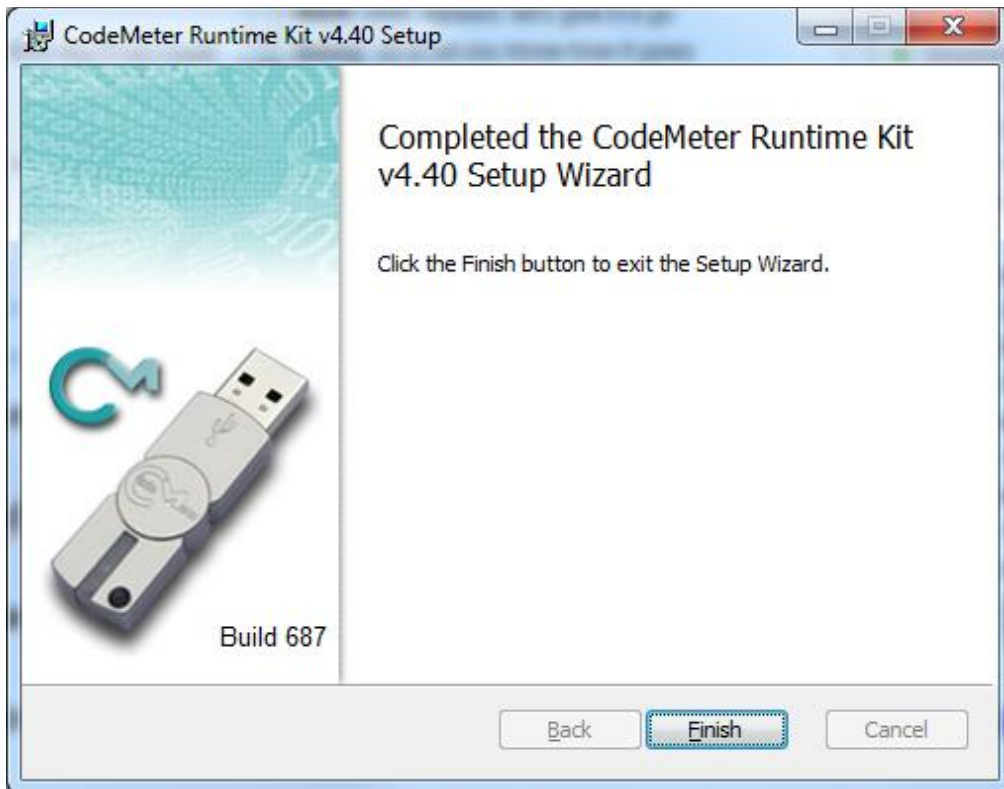
4) Review the *Custom Setup* dialog. Please note the space required on your hard drive, then click **Next**.



5) Click **Install**.



6) Click **Finish**.



Installing License Manager

Download "License Manager Version 3.1.3.61" from <http://accessdata.com/support/adownloads>.

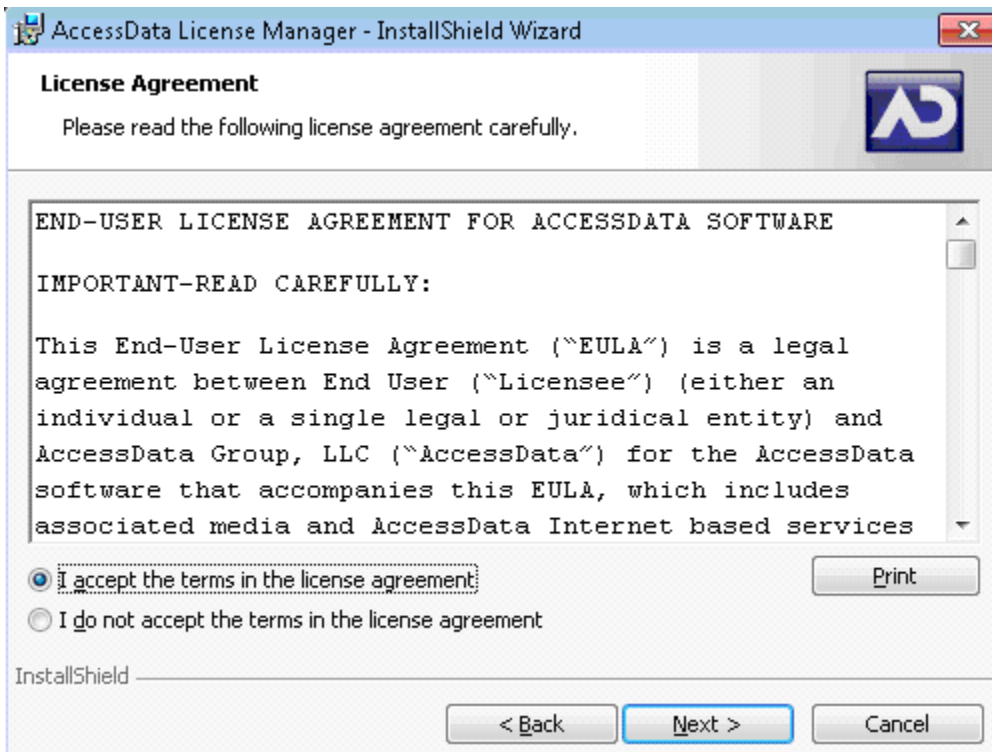
Full download link:

http://accessdata.com/downloads/current_releases/lm/lm-license-manager-3-1-3-61.exe

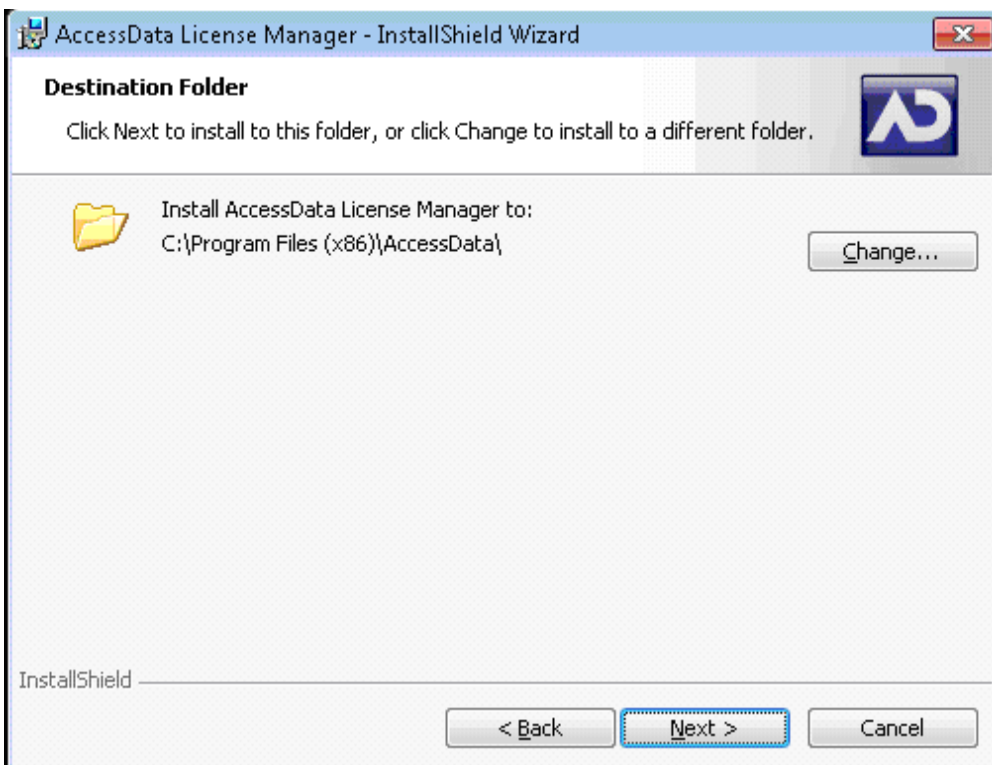
1) Run the "lm-license-manager-3-1-3-61.exe" file. Click **Next**.



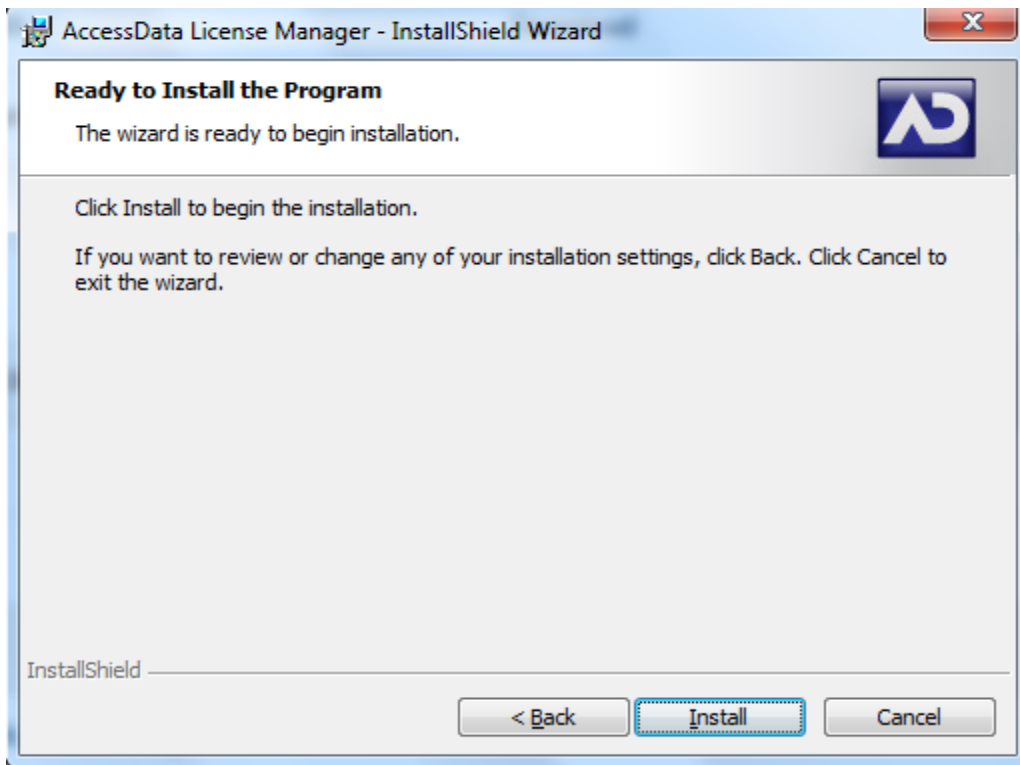
2) Review and Accept the License agreement and click **Next**.



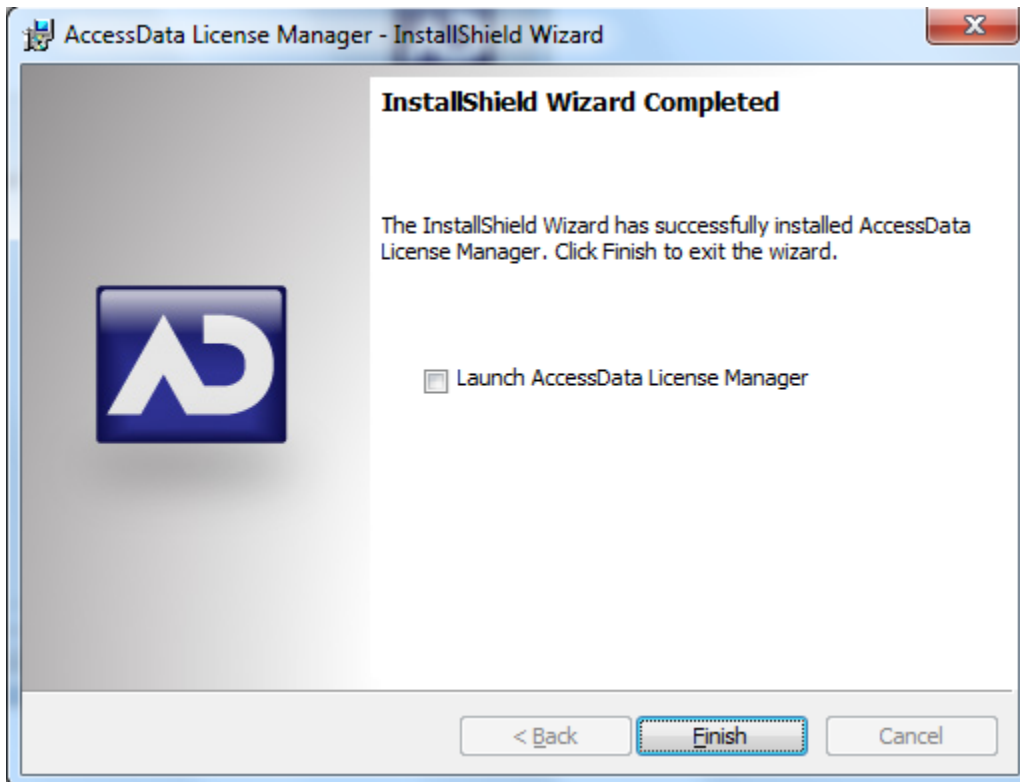
- 3) On the *Destination Folder* dialog, click **Next**.
It is recommended that you accept the default location.



- 4) Click **Install**.



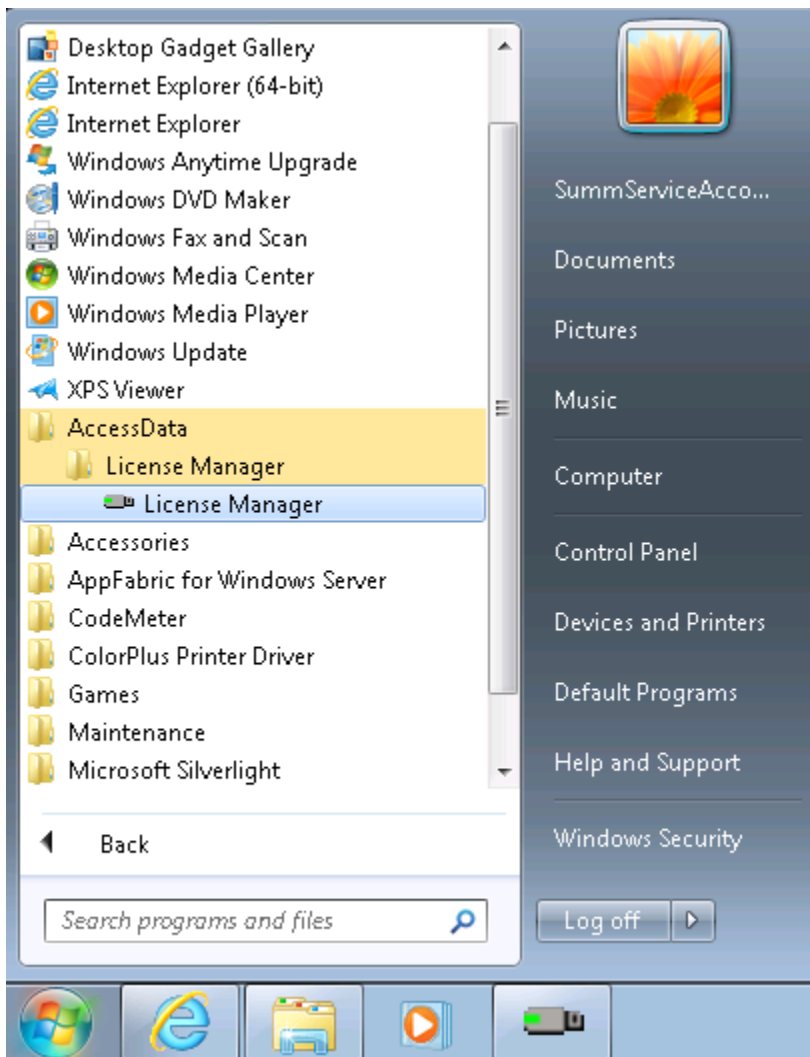
5) Click **Finish**.



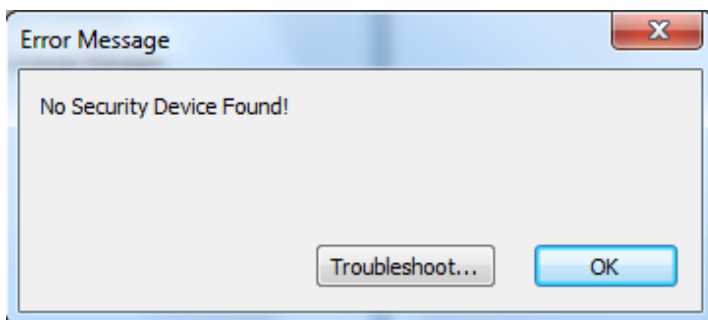
Activating your Summation Express License (Virtual Dongle)

Note: If you have received a physical dongle, please plug in the dongle before running License Manager and skip steps 2 through 7 below.

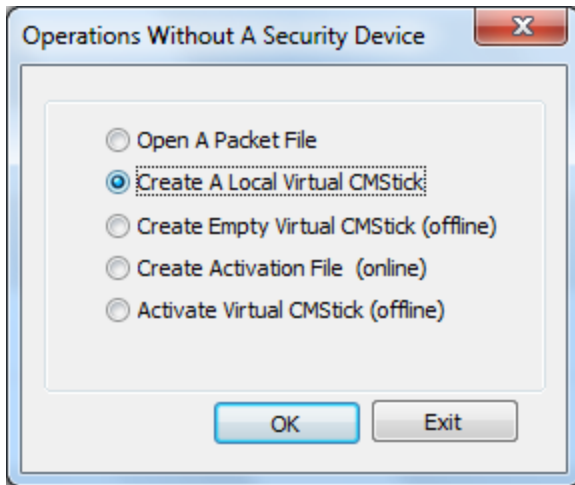
- 1) Click **Start > Programs > AccessData > License Manager** and run License Manager.



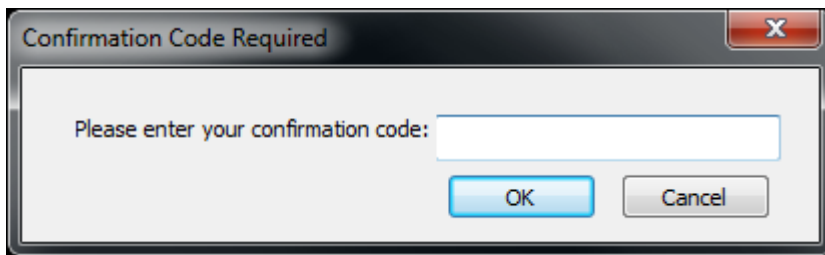
- 2) You will see an Error Message prompt saying "No Security Device Found!" Disregard and click **OK**.



- 3) Select **Create A Local Virtual CMStick** and click **OK**.

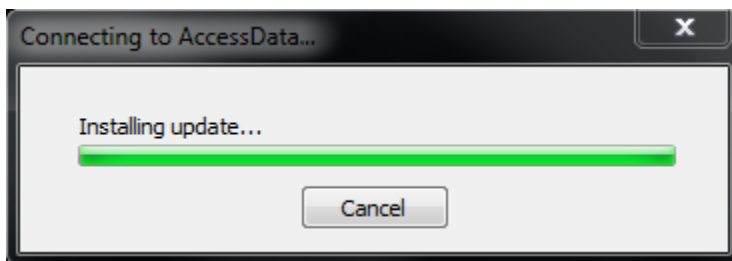


- 4) Please enter your confirmation code; you received the code in your purchase confirmation email.

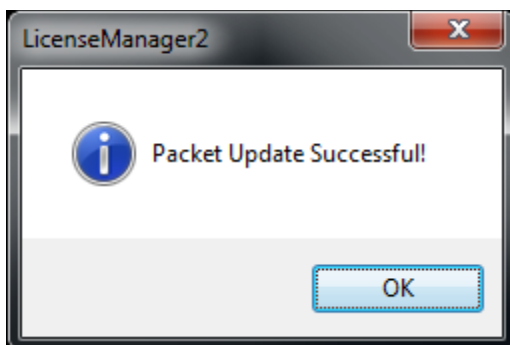


- 5) License Manager will automatically synchronize with the License Server over the Internet.

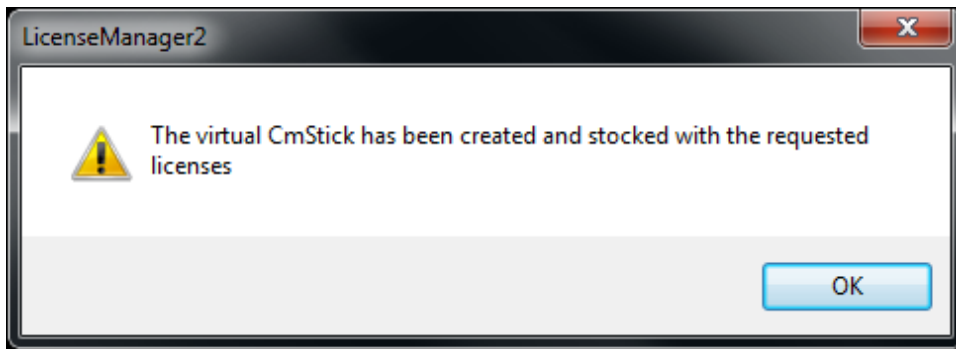
Note: This step requires the Summation Express machine to have an active internet connection.



- 6) Click **OK** after receiving the "Packet Update Successful!" message.

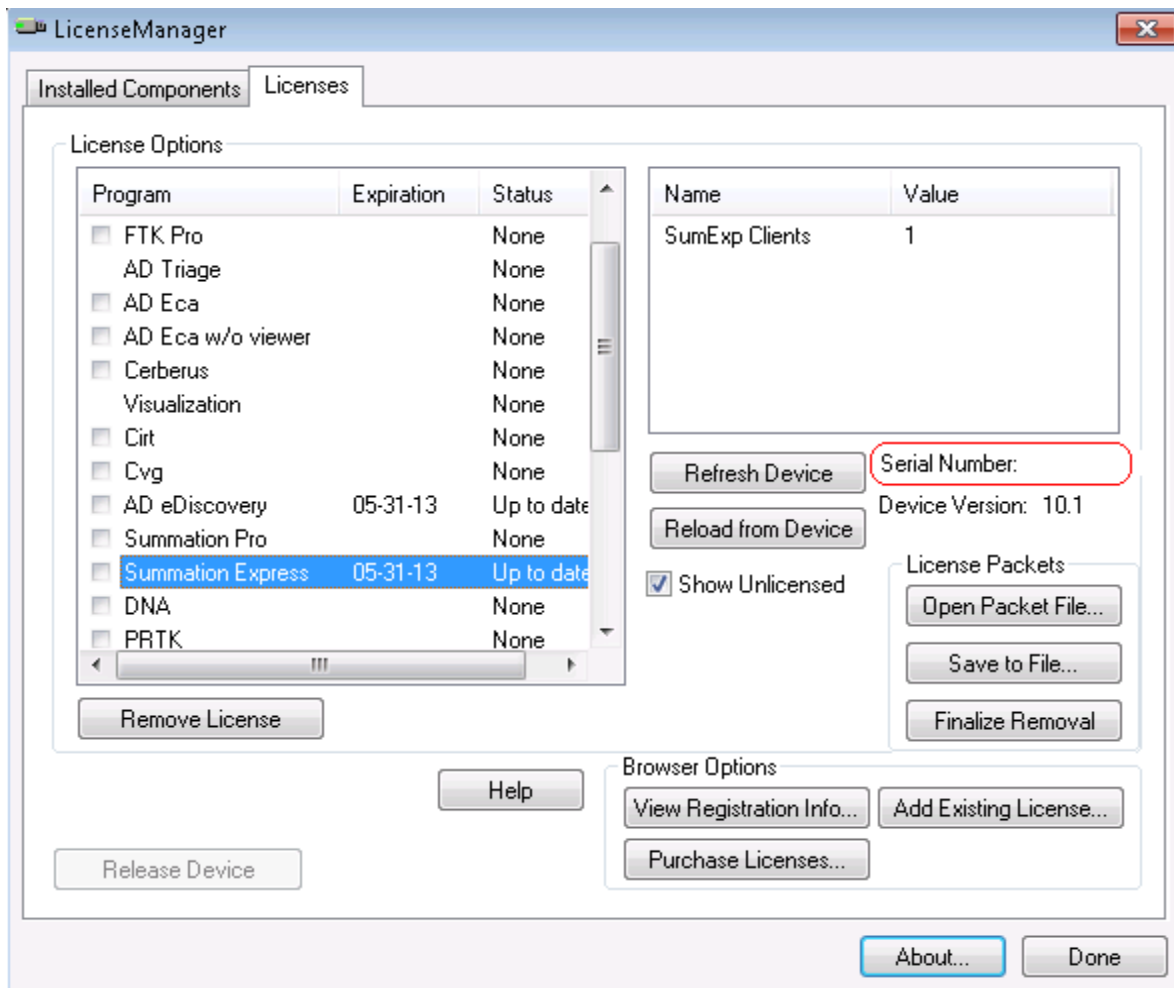


- 7) At the next prompt, click **OK**.



- 8) You will now see a new dialog box similar to below. Click on the **Licenses** tab and note the Serial Number.
- 9) Click the **Refresh Device** button if your licenses do not appear.

Note: When contacting Summation Technical Support, the product support team will request your serial number to confirm that you have a current subscription for maintenance.



- 10) The Summation Express license is now active. Click **Done**.

Note: Please be aware that, after activation, your Summation Express license will be bound to the machine and cannot be moved. For more information about virtual license dongles, please see the following document:

http://accessdata.com/downloads/media/VCM_Activation_Guide.pdf

Installing Summation Express

The Summation Express installation process will attempt to install and configure the following items:

- Microsoft Visual C++ 2010 x64 (Redistributable)
- Prizm Content Connect Plus 64-bit
- Prizm Content Connect Plus Configuration
- BlackIce (ColorPlus printer driver)
- Microsoft .NET Framework 4.0 (4.0.30319)
- Microsoft AppFabric 1.1
- Microsoft Message Queuing
- Microsoft Internet Information Services (IIS 7.5)
- Microsoft SQL Server 2008 Express Edition
- SummationDesktop (the Summation Express host application)

Please follow the steps below to download and extract the Summation Express installer package:

- 1) Download the installer package from <http://summation.accessdata.com>.
- 2) Extract the downloaded ZIP file to a folder.

Note: Please allow 30 to 60 minutes to complete the installation process.

Recommendation: Save all other work and exit other applications prior to installing Summation Express.

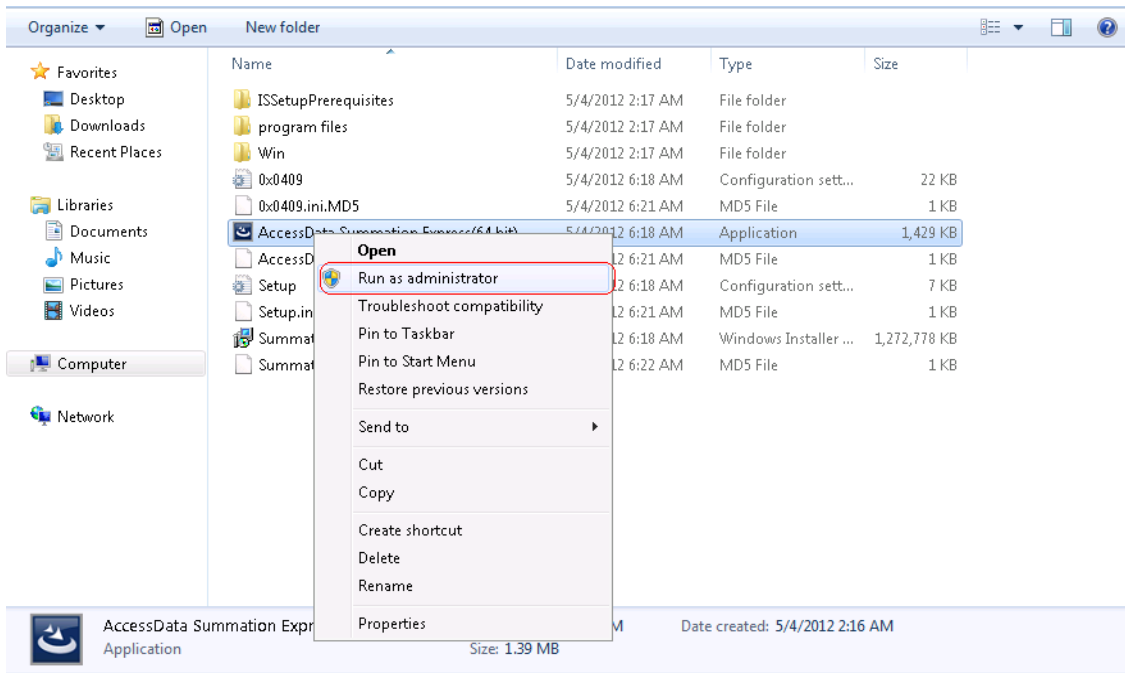
WARNING: A reboot may occur after certain parts of the installation are completed, and you may see certain dialogs pop up during some portions of the install. This is expected.

To begin the installation:

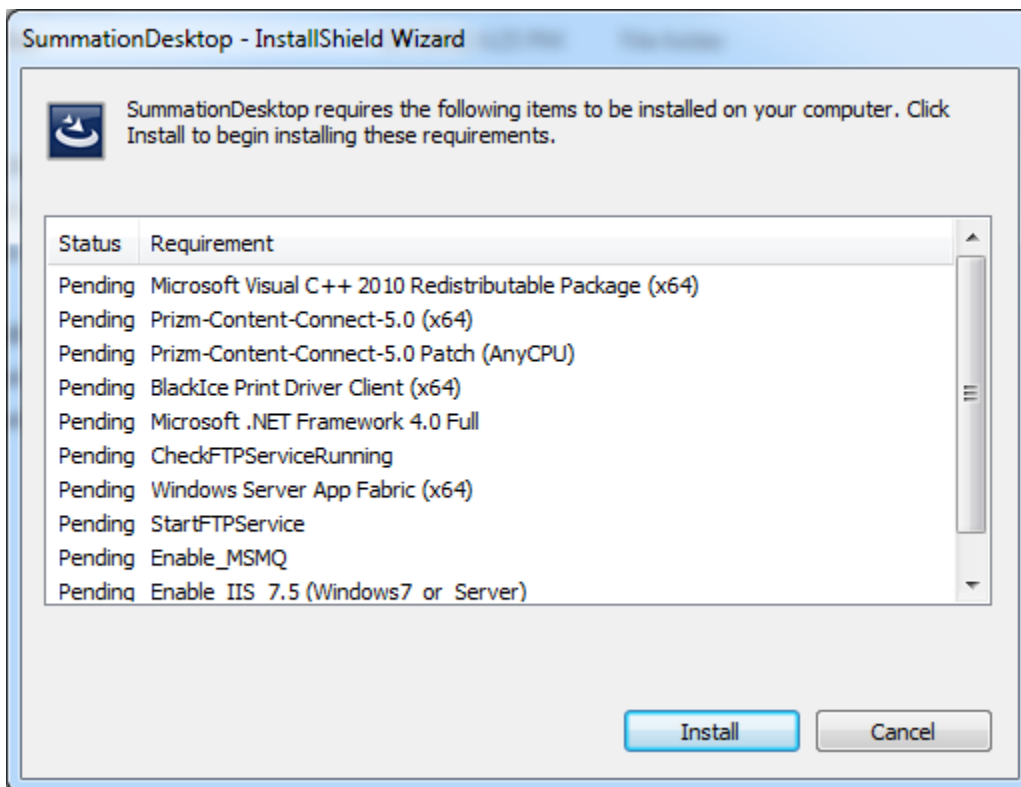
- 1) On the machine that will have Summation Express installed to it, first create a Local Admin account for use as the Service Account under which Summation Express will run.

Note: Important—This Service Account should have a password that **never expires** and **never requires changing**.

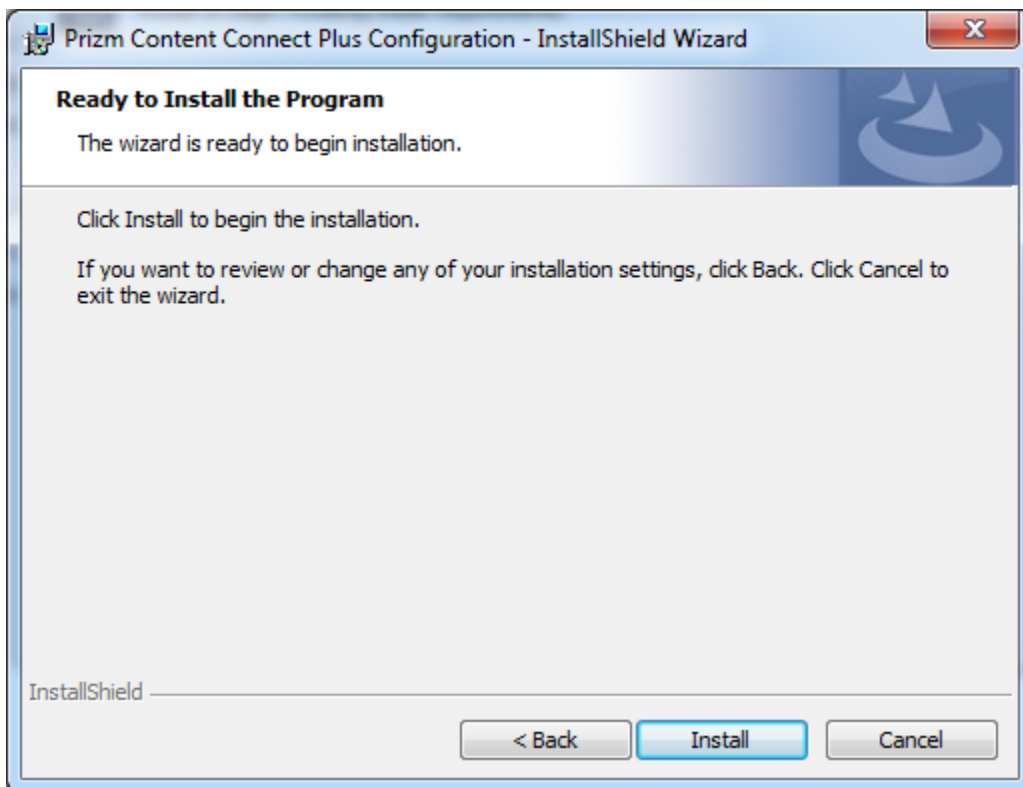
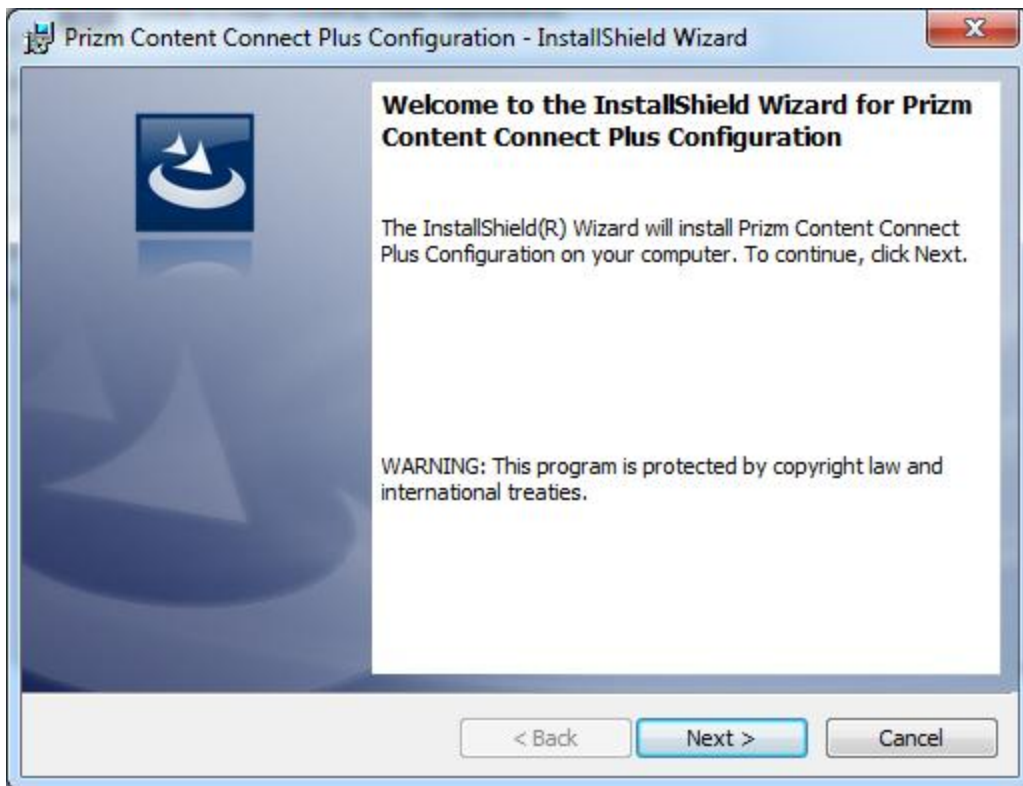
- 2) Log in to the Summation Express machine using the account credentials created in step 1 above.
- 3) Right click on the “AccessData Summation Express(64 bit).exe” executable and choose **Run as administrator**.

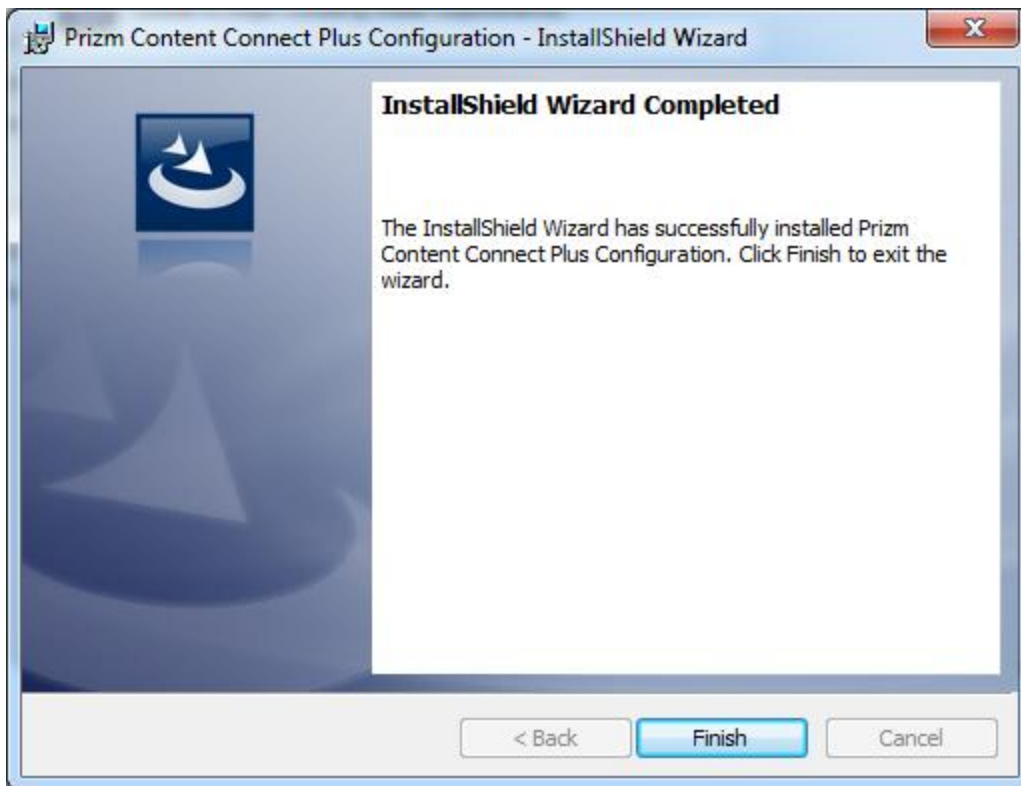


4) The following screen will appear with a list of pre-requisites for Summation to run. Click **Install**.



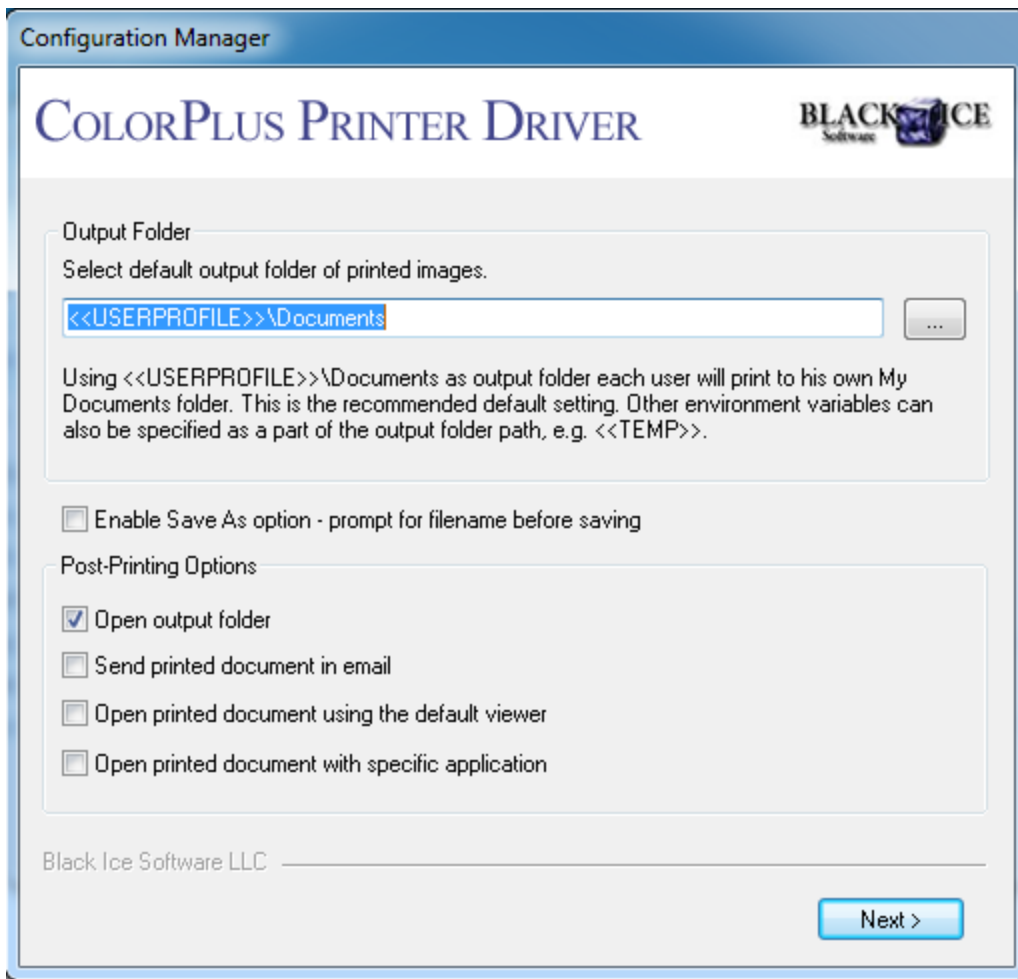
5) The first prompts that appear are for the "Prizm Content Connect Plus Configuration" installation. Click **Next > Install > Finish** on these 3 screen prompts.



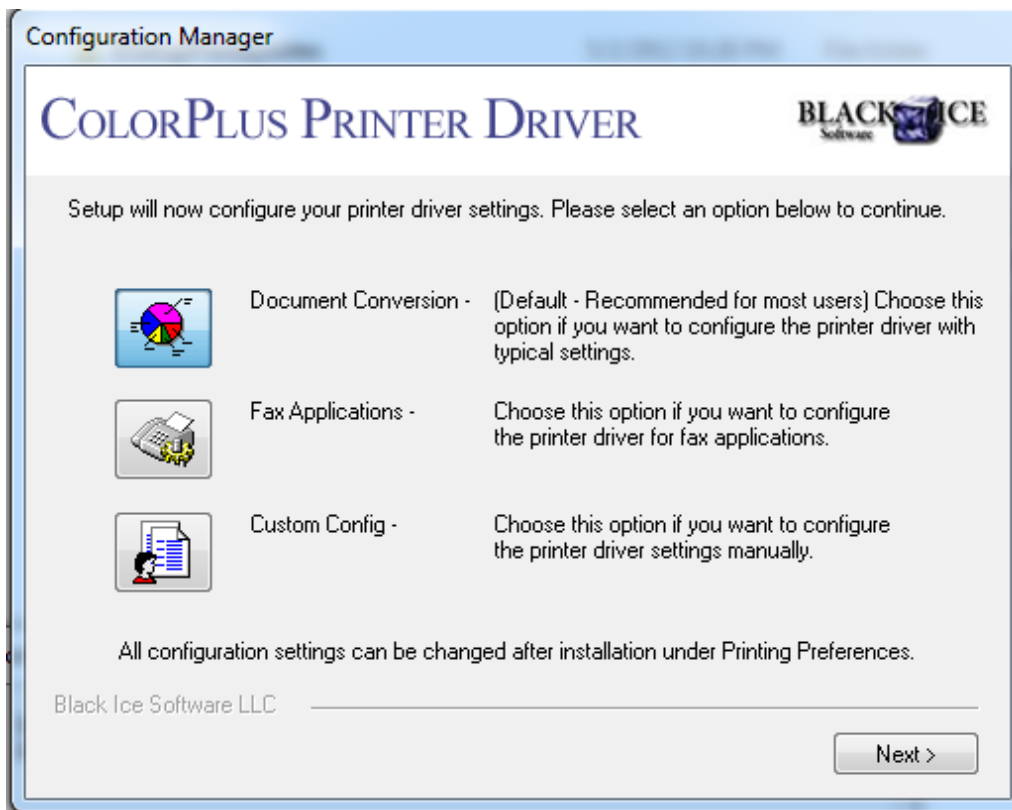


- 6) BlackIce (ColorPlus Printer Driver) is the next program that will be installed. The first prompt will ask you to specify an "Output Folder". Summation Express will use this "Output Folder" as temporary storage for files generated during the imaging process. The default location for the Output Folder is the Summation Express service account's "Documents" library (e.g. **C:\Users\SummationServiceAccount\AppData\Roaming\Microsoft\Windows\Libraries\Documents**). If you would like Summation Express to create temporary files elsewhere, enter that location here. Click **Next**.

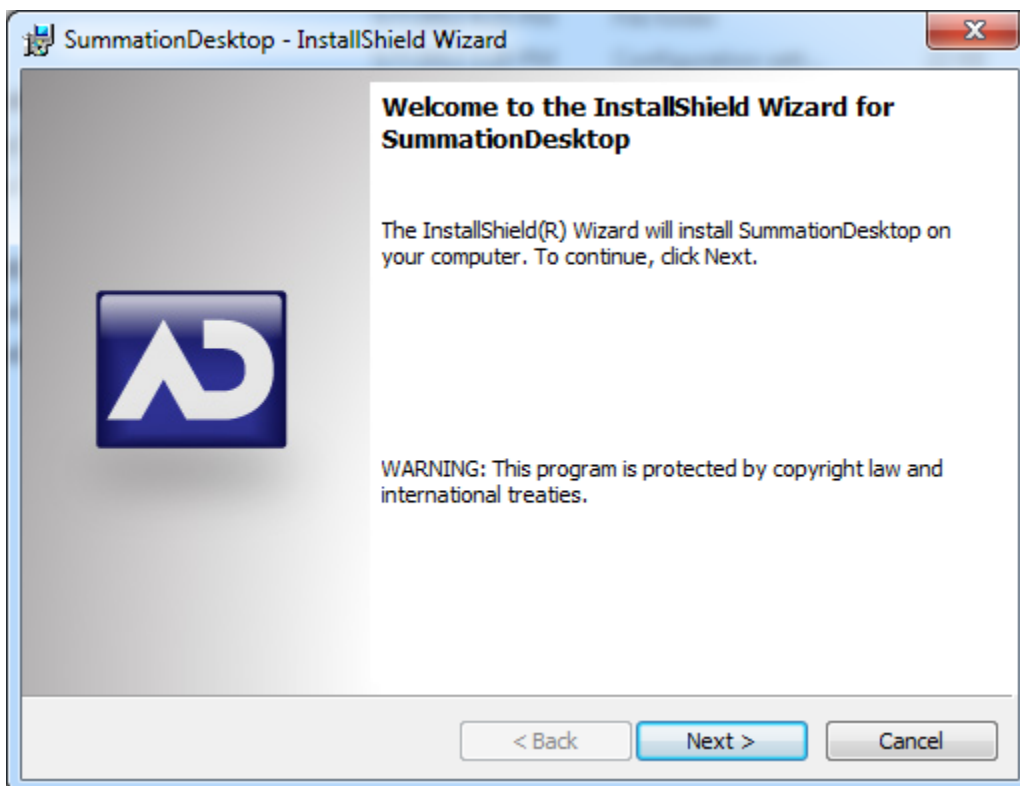
Note: It is recommended to have 50 Gigabytes or more of free space available at the specified temp location.



- 7) The *Configuration Manager* for BlackIce “ColorPlus Printer Driver” will appear. Accept the default settings by clicking **Next**.



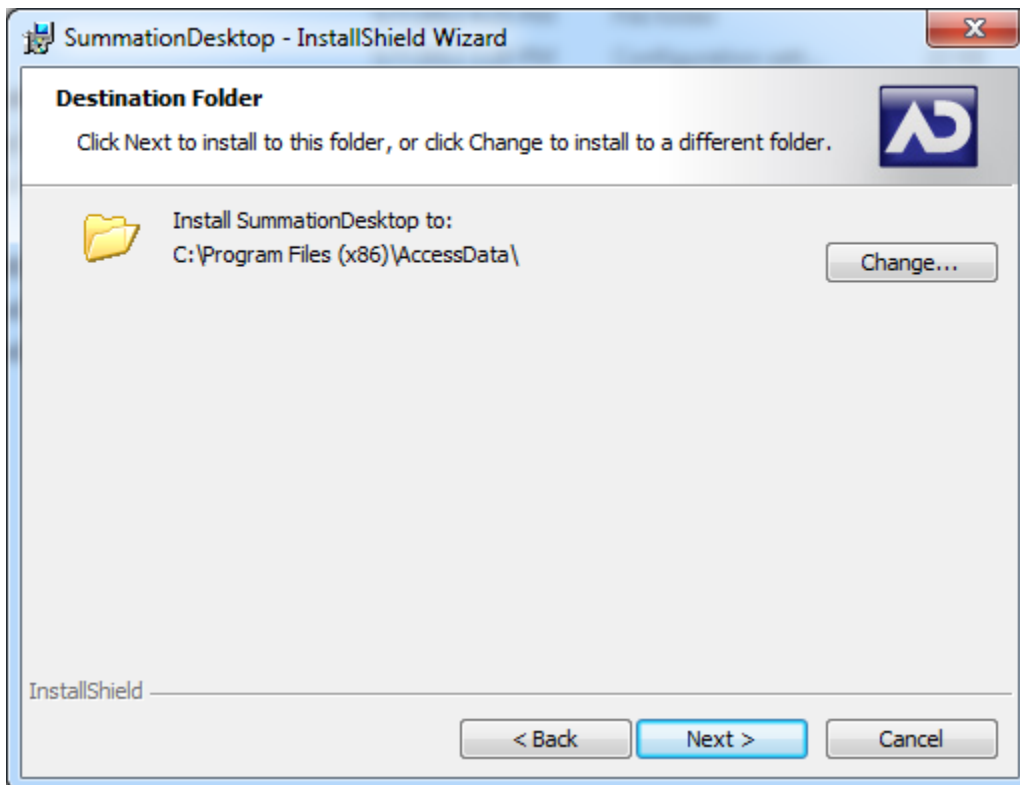
- 8) The BlackIce installer will complete and the installation will move on to installing/enabling the other listed pre-requisites if not already present on the machine.
- 9) After the pre-requisites are installed and configured, the Summation Desktop installer begins. Click **Next**.



- 10) Please accept the license agreement to continue and click **Next**.

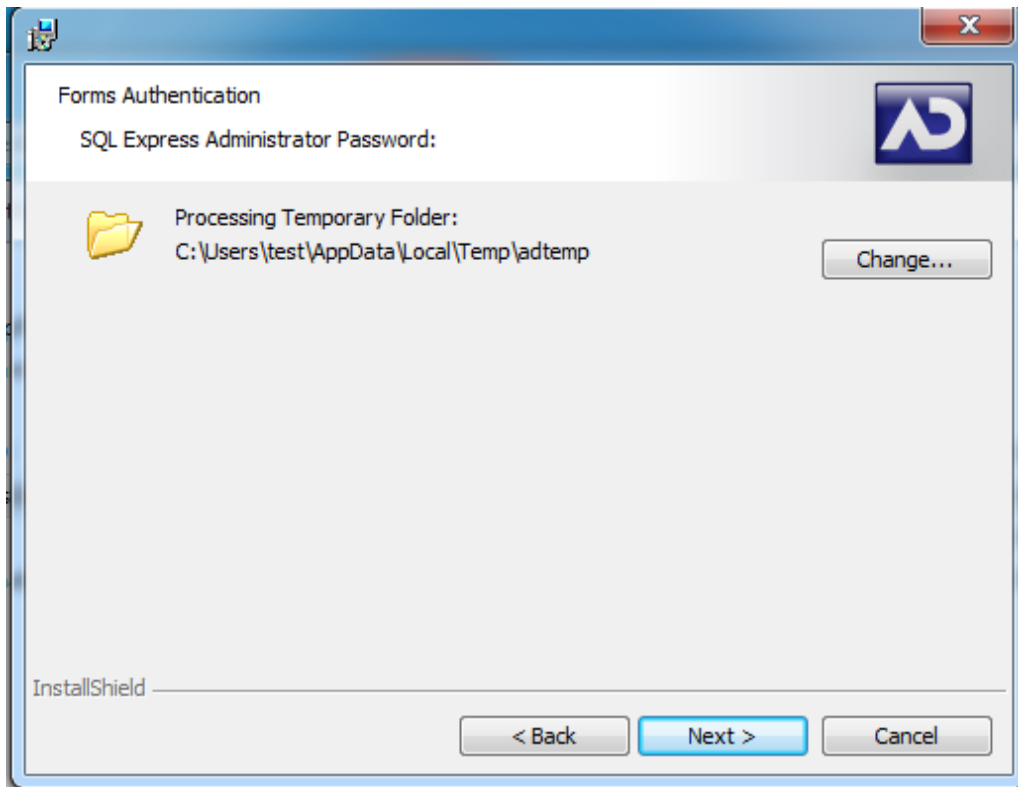


11) Leave unchanged the default location for the installation and click **Next**.

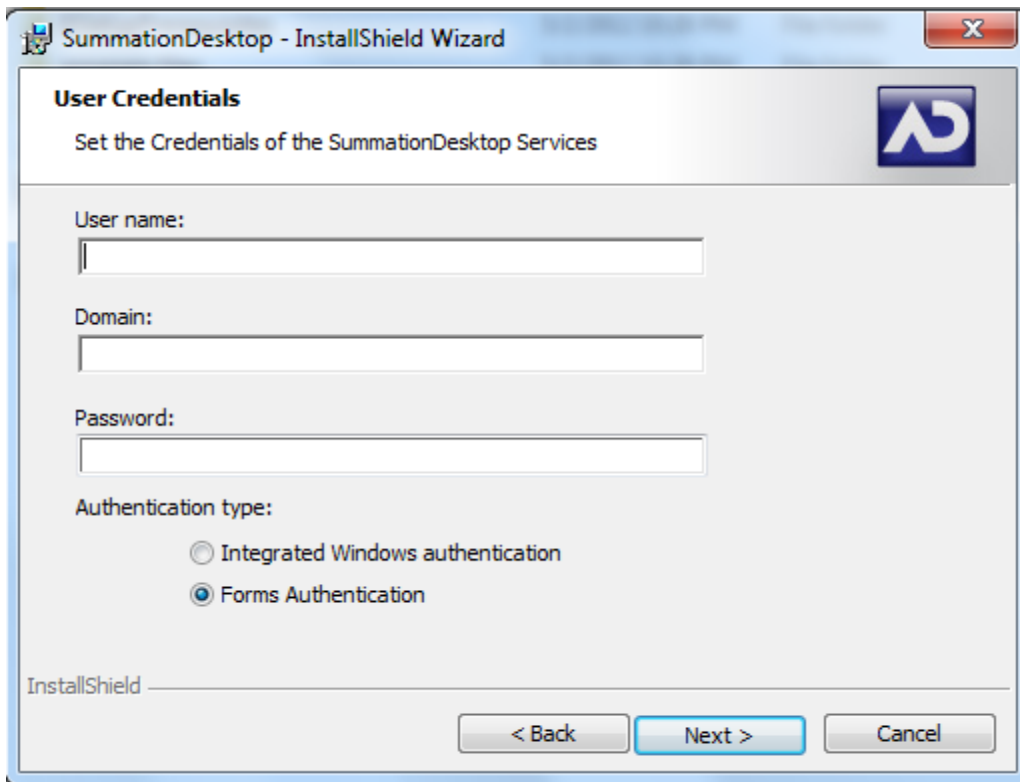


12) Specifying a Processing Temporary Folder: If you have a specified location for the temporary processing folder, change the path on the below dialog to your desired path. Otherwise leave the default and click **Next**.

Note: The “Processing Temporary Folder” is a location that will store temporary files while work processing tasks are running (i.e. when new files are generated on the file system, e.g. while imaging native files, during Evidence Processing, Exporting production sets, and other similar tasks). It is recommended that this location be able to accommodate 50 gigabytes or more of temporary files.



- 13) Enter user name, domain and password information for your service user (this is the user account created in step 1 and which you used to login with in step 2) and click **Next**. Please note the following:
- **DOMAIN:** If you are on a workgroup (non-domain, single computer) leave the domain blank.
 - **AUTHENTICATION TYPE:** The authentication type can be either “Integrated Windows” or “Forms.” If you are unsure, please leave the default setting of “Forms.”



SQL Server 2008 R2 Express Edition Install

If the machine you are installing to does not have an instance of SQL Server running already, the next dialog will initiate an installation of Microsoft SQL Server 2008 R2 Express Edition.

Note: If you already have an instance of SQL Server 2008 on the Summation Express machine, please skip this section and see the section “SQL Server 2008 Configuration for an Existing SQL Server Instance.”

1) On the dialog below, you will be setting a SQL Server password for a default SQL administrator account named “sa.”

IMPORTANT: For the user “sa,” please define a complex password. If the ‘sa’ password does not meet the following requirements, the Summation Express installation will not proceed properly. You should write down this password; it will be needed later in the installation process.

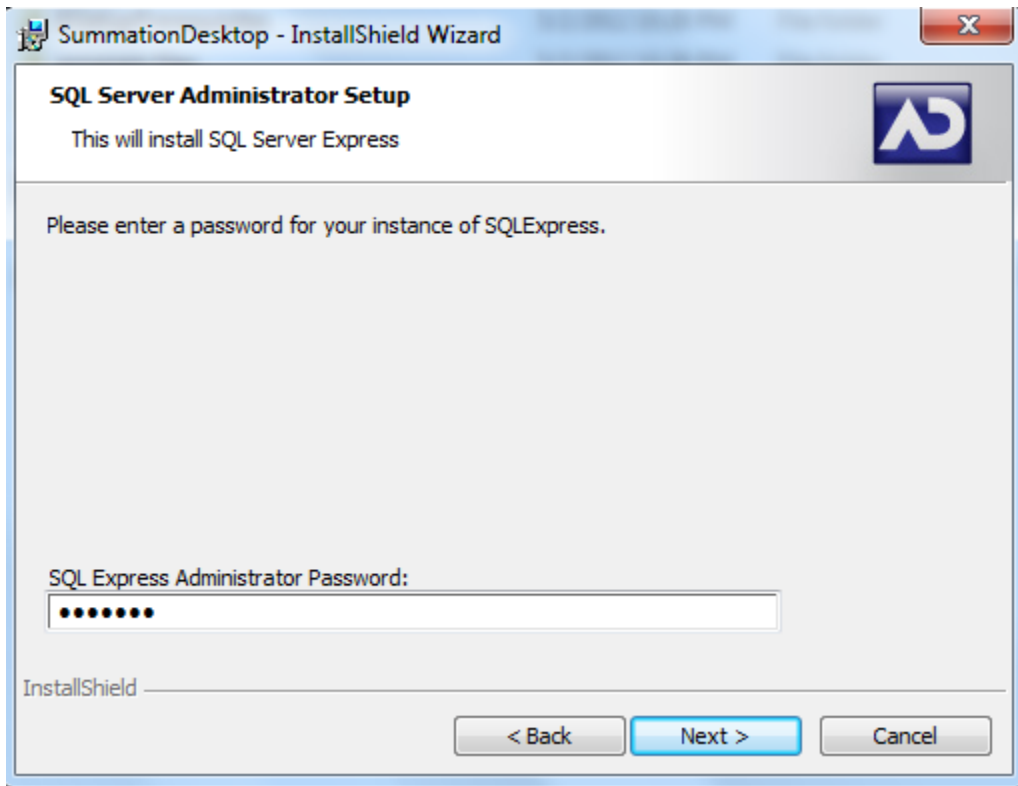
Microsoft SQL Server passwords must meet the following password guidelines:

- The password does not contain all or part of the account name of the user. Part of an account name is defined as three or more consecutive alphanumeric characters delimited on either ends by white space such as space, tab, and return, or any of the following characters: comma (,), period (.), hyphen (-), underscore (_), or number sign (#).
- The password is at least eight characters long.
- The password contains characters from three of the following four categories:
 1. Latin uppercase letters (A through Z)
 2. Latin lowercase letters (a through z)
 3. Base 10 digits (0 through 9)
 4. Non-alphanumeric characters such as: exclamation point (!), dollar sign (\$), number sign (#), or percent (%).

Source: [http://msdn.microsoft.com/en-us/library/ms161959\(v=sql.105\).aspx](http://msdn.microsoft.com/en-us/library/ms161959(v=sql.105).aspx)

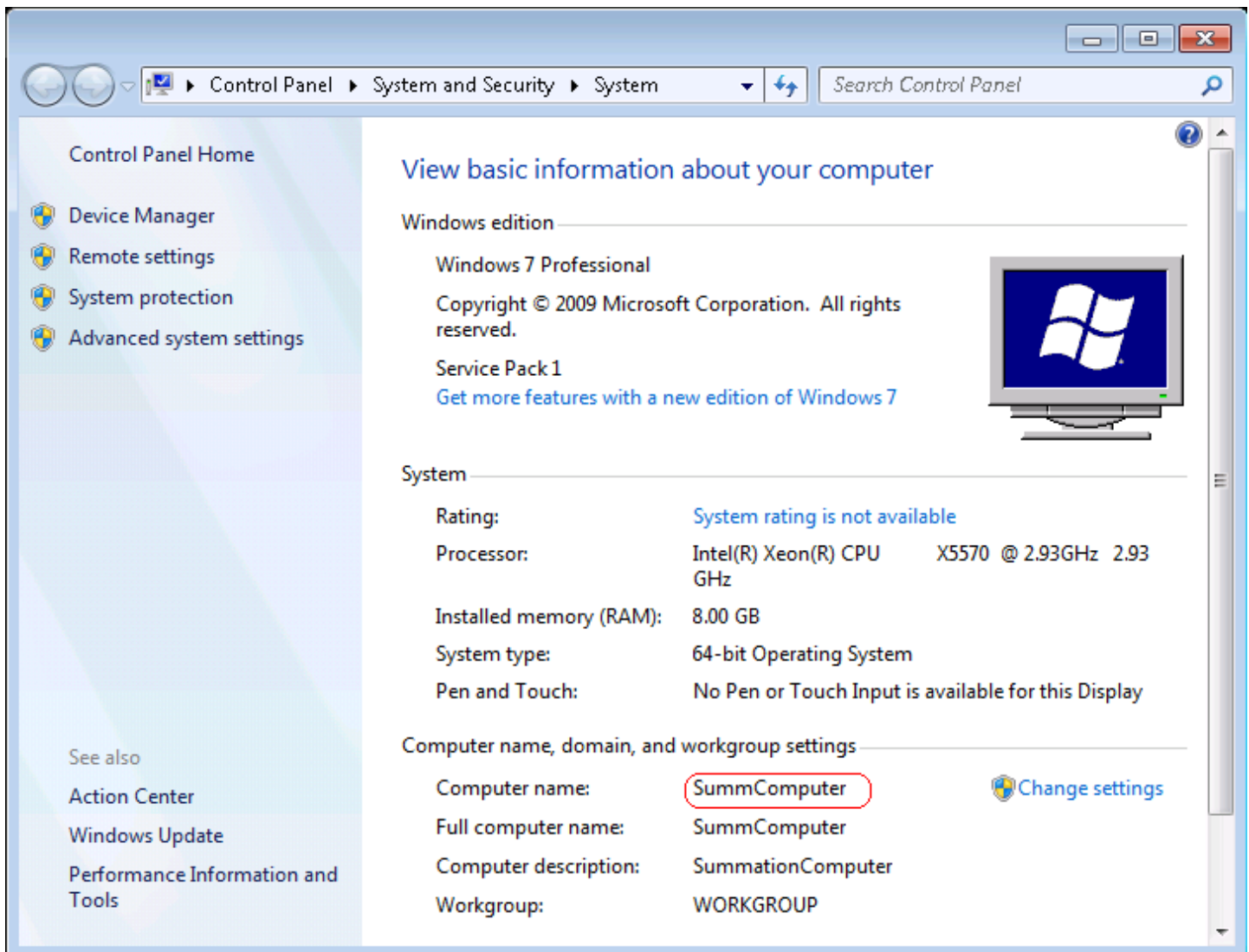
Reminder: Please write down this 'sa' password; it will be used again later in the installation process.

2) Click **Next** to proceed with installing SQL Server. This may take a few minutes.



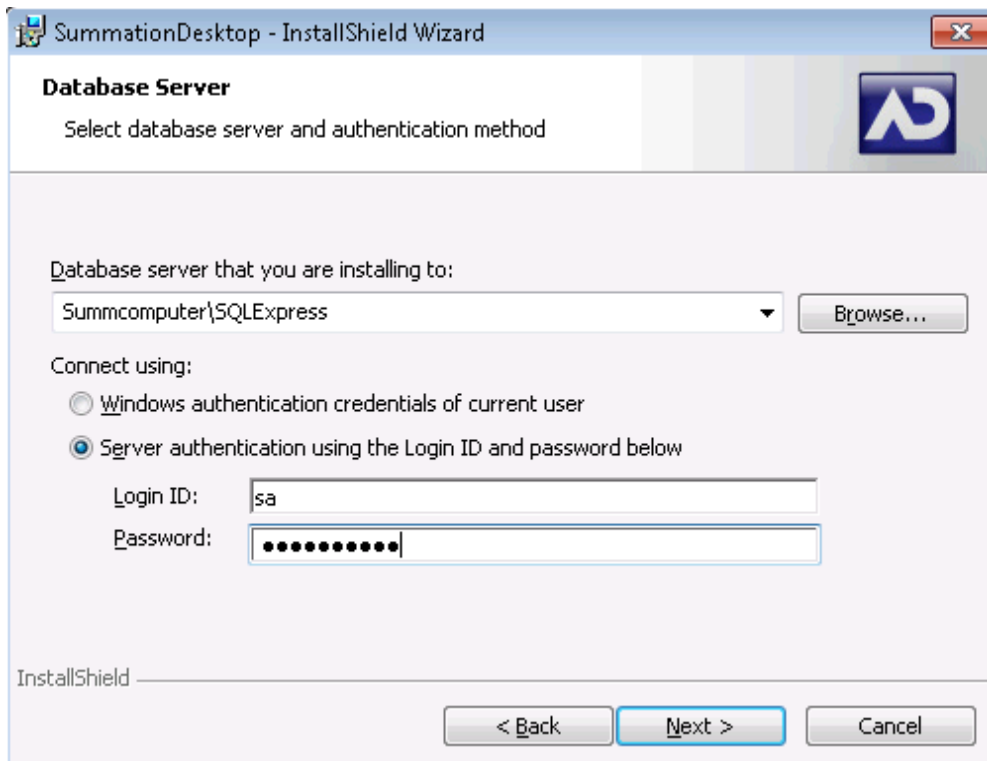
After SQL Server 2008 is installed, the Summation Desktop installation will begin.

- 3) In the *Database server that you are installing to* dialog, remove the "(local)" entry and submit "your computer name\SQLEXPRESS".
- To determine your machine name, click the **Start** button, right-click on **Computer**, and select **Properties**. E.g. in the computer properties screen below, the computer name is "SummComputer" and the SQL server instance name is "SummComputer\SQLEXPRESS".

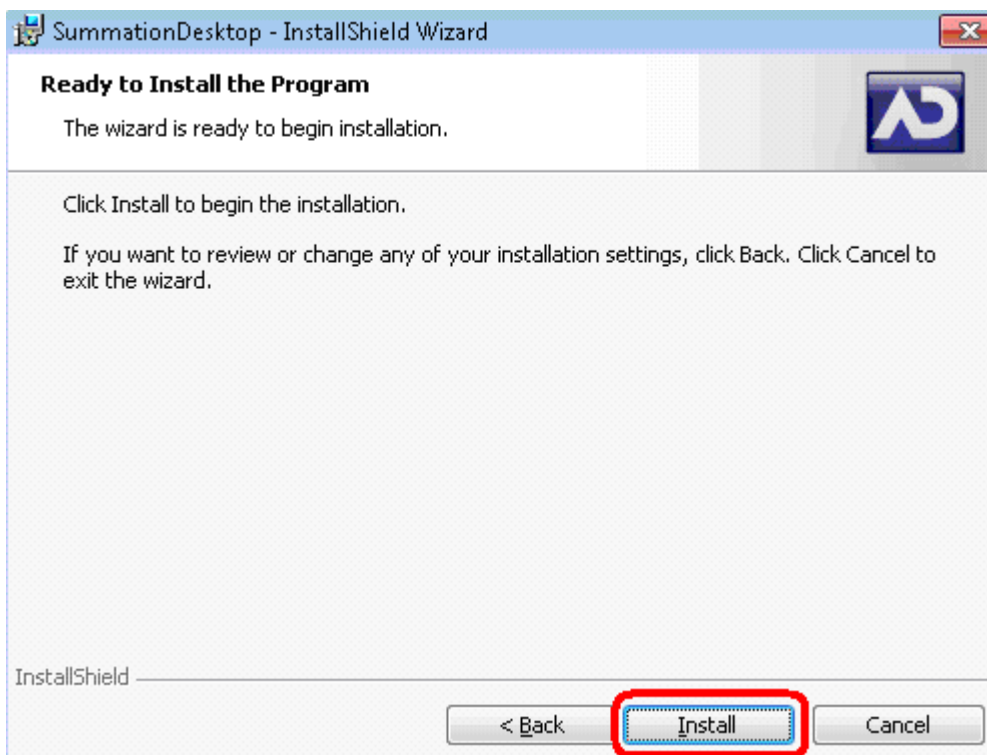


What to use for SQL credentials:

- Database server that you are installing to: Submit "your machine name\SQLEXPRESS".
- Select "Server authentication" and fill in "sa" as the username and fill in the "sa" user's password, which was created in step 1 of this section.



4) After filling in the SQL credentials that Summation Desktop will use, click **Next**, then **Install**.



5) After installation is complete you will be prompted to set up the Summation application database. Choose the following:

- Database Type: MSSQL
- Database Admin Username: sa
- Database Admin Password: You determined this during step 1 of this section
- Host: the SQL Server instance name - this should match the “Database server that you are installing to” from step 3 of this section (e.g. “SummComputer\sqlexpress”)
- Port: Leave unchanged (value should be “-1”)

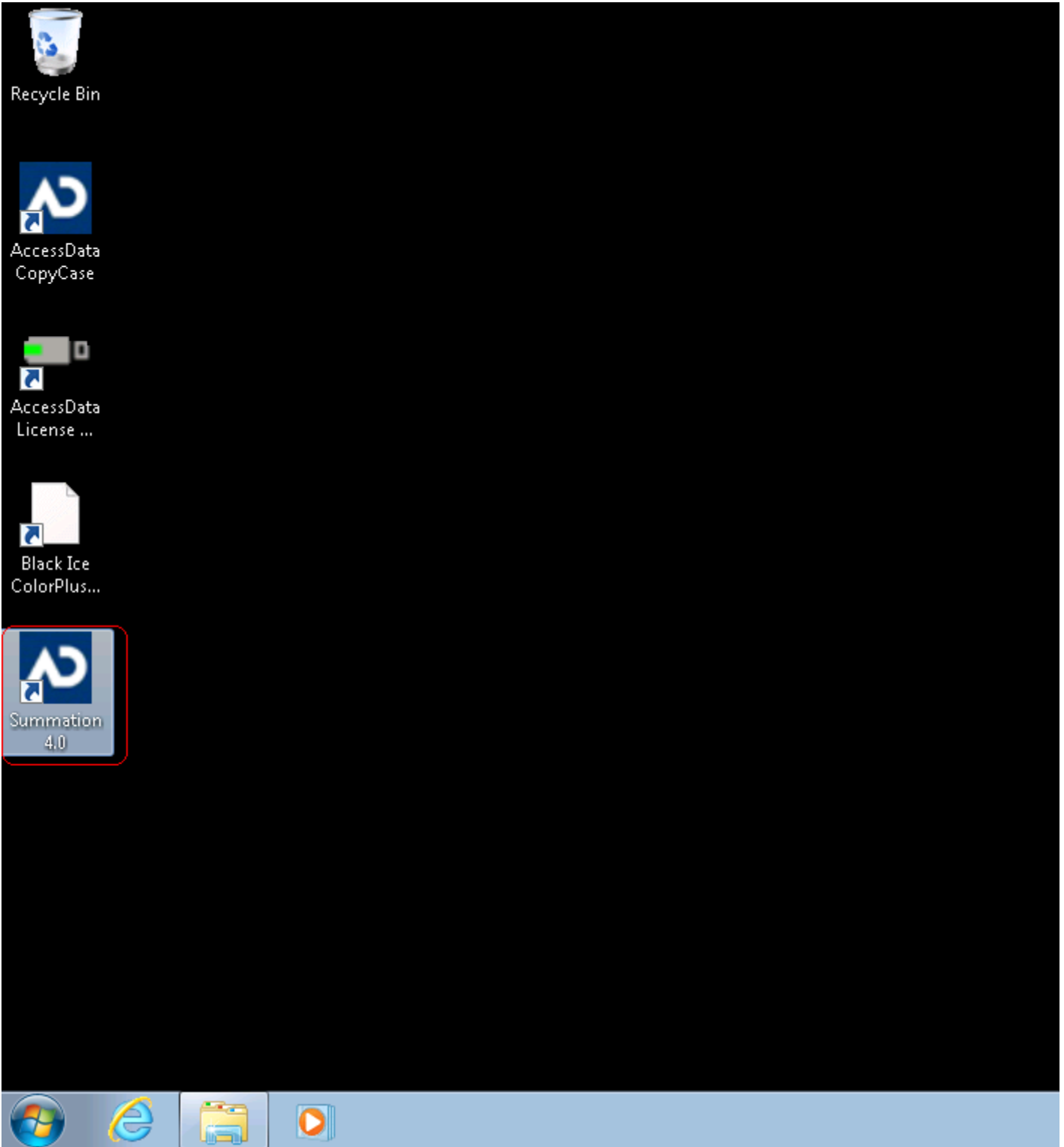
The screenshot shows the 'Database Configuration' dialog box. The 'Application Database Administrator Information' section is highlighted with a red border. This section contains the 'User name' field with the value 'SummationAdmin' and the 'Password' field with masked characters. The 'Continue' button is visible at the bottom right of the dialog.

- “Application Database Administrator Information” section (highlighted in screenshot above) is where you will set up the first named user of the Summation Express application. This user will have Super Admin privileges and will be used to log into Summation for the first time.

If you are using Windows authentication, you should submit a username in the following format:
“DomainName\username”.

6) After this last part of the install completes, your machine will be rebooted automatically.

7) After the reboot, a shortcut on the desktop for Summation will be present. Click this shortcut to launch the Summation application, and log in with the “Application Database Administrator” account you created.

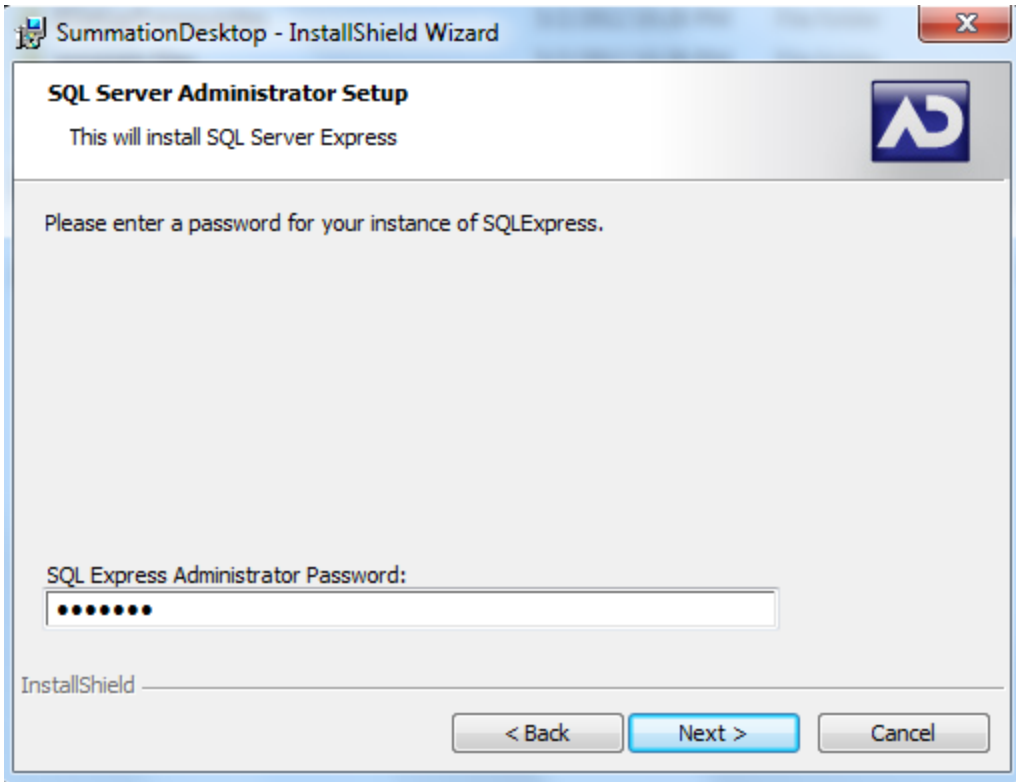


Please see Page 29 for information about what add-ons are needed for Internet Explorer.

SQL Server 2008 Configuration for an Existing SQL Server Instance

- 1) If the Summation Express machine already has an instance of SQL Server which you would like Summation Express to utilize, then you should submit the password of the Service Account created on step 1 of page 11 and click **Next**.

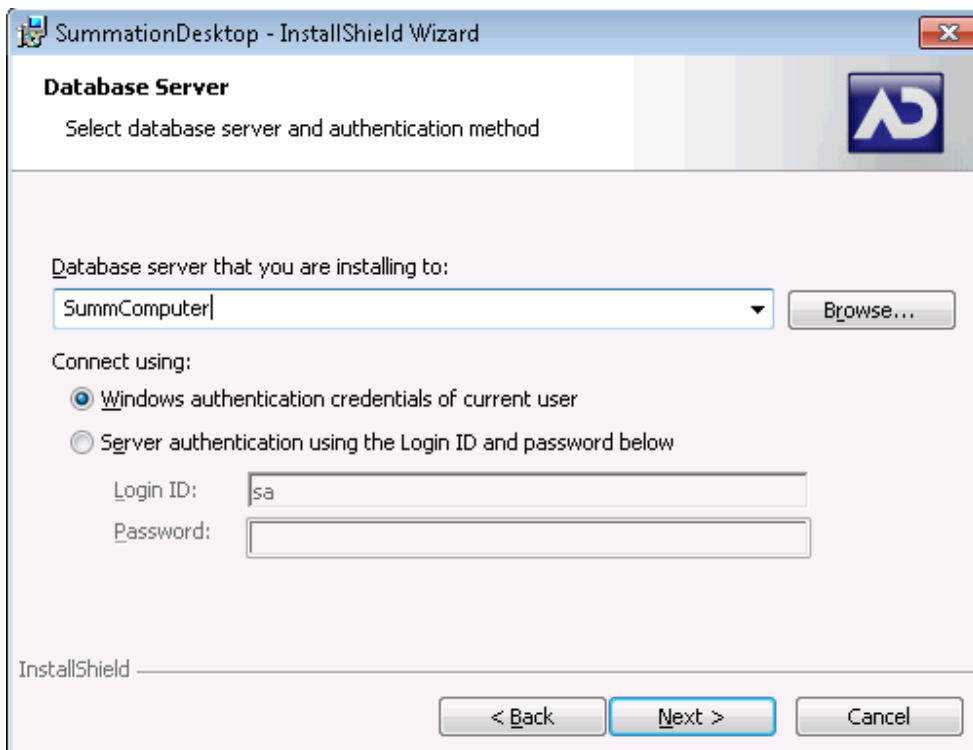
As an additional step, please login to the Summation Express machine's SQL instance as a SQL sysadmin and add that same service account as a SQL sysadmin.



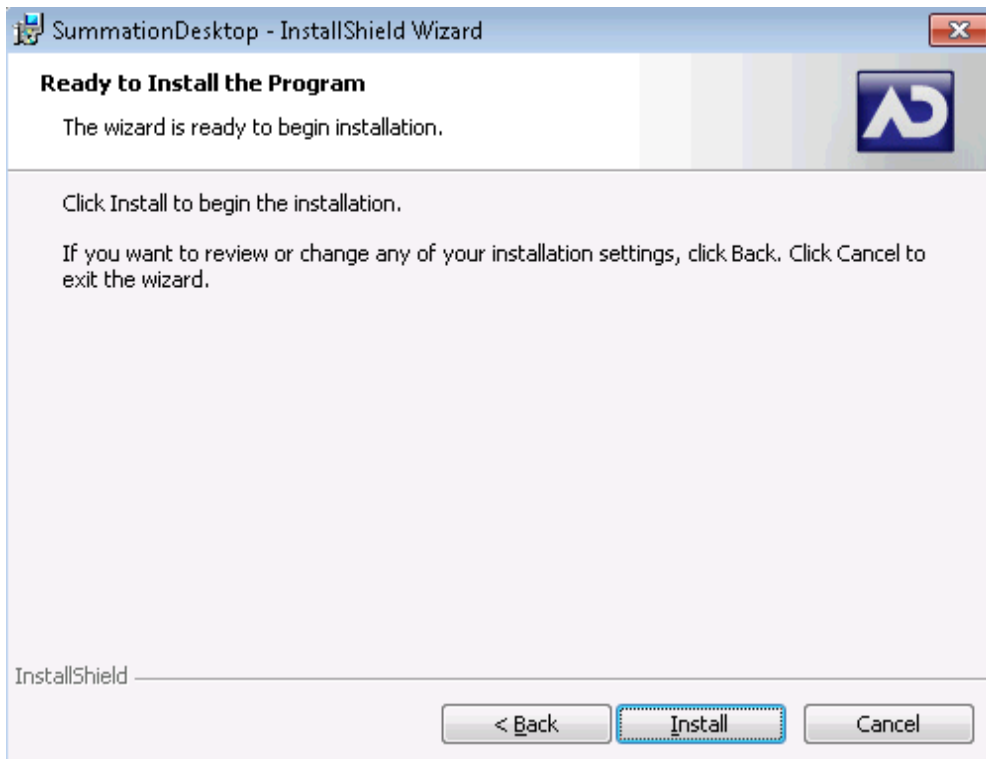
Note: The Summation Express installation process will attempt to create four SQL databases:

- ADG
- eDiscovery
- Infrastructure
- Workflow

- 2) What to use for SQL credentials:
 - In the *Database server that you are installing to* dialog, remove the "(local)" entry and submit the proper instance name (if a default instance, this will be the machine name).
 - Select "Windows authentication credentials of current user."



3) After filling in the SQL credentials that Summation Desktop will use, click **Next**, then **Install**.



- 4) After installation is complete you will be prompted to set up the Summation application database. Choose the following:
- Database Type: MSSQL
 - Database Admin Username: Submit the service account's username created in step 1 of page 11
 - Database Admin Password: Submit the service account's password created in step 1 of page 11
 - Host: The SQL Server instance name - this should match the "Database server that you are installing to" from step 2 of this section (e.g. "SummComputer")

- Port: Leave unchanged (value should be “-1”)

Database Configuration

Database Type: MSSQL
Database Admin Username: SummServiceAccount
- default is "sa" unless you set it otherwise.
Host: SummComputer
Database Admin Password: *****
Port: -1
Database Name: ADG

Application Database Administrator Information

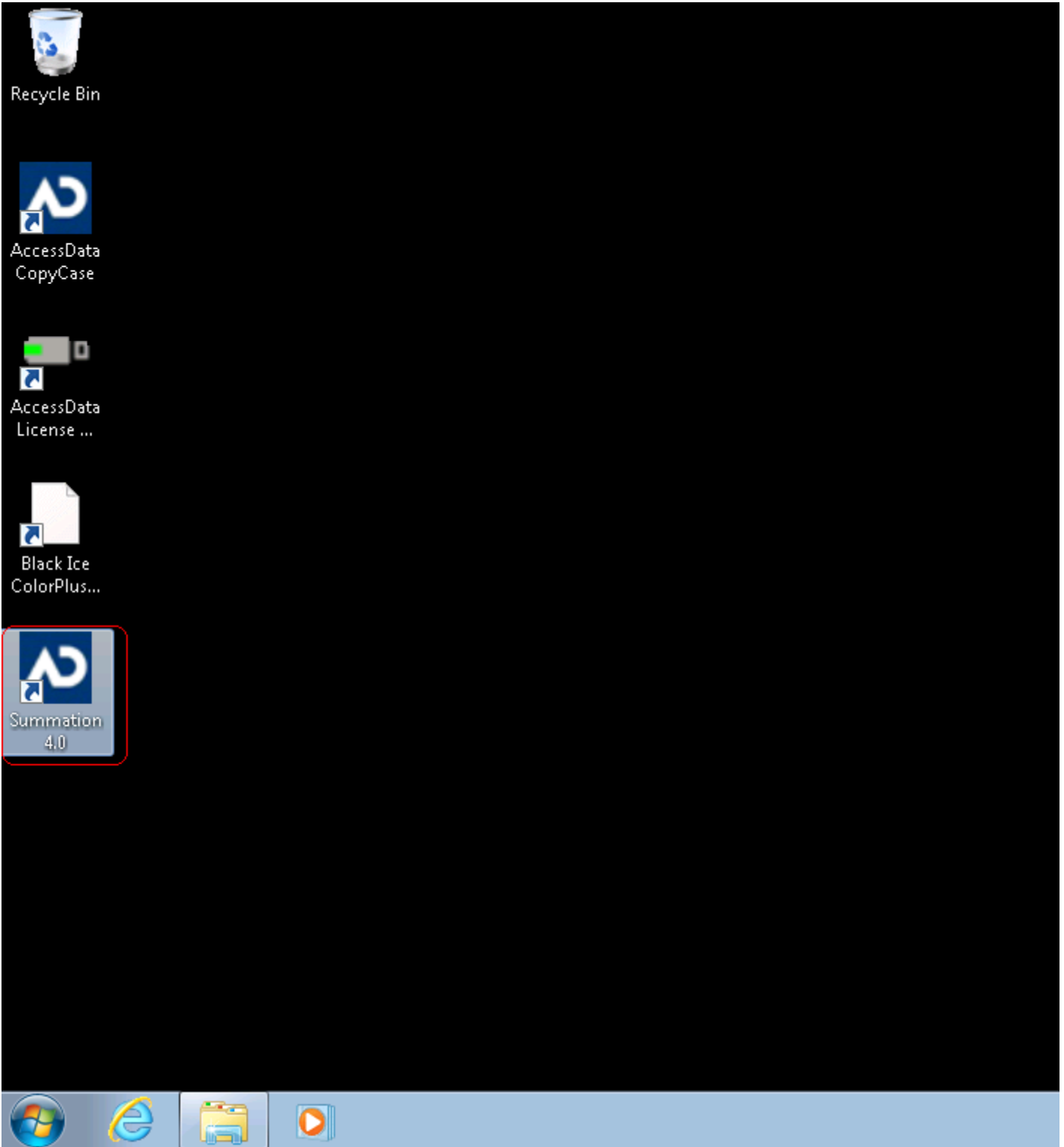
User name: SummationAdmin
Password: *****

Waiting for Input

Continue

- “Application Database Administrator Information” section (highlighted in screenshot above) is where you will set up the first named user of the Summation Express application. This user will have Super Admin privileges and will be used to log into Summation for the first time. If you are using Windows authentication, you should submit a username in the following format: “DomainName\username”.

- 5) After this last part of the install completes, your machine will be rebooted automatically.
- 6) After the reboot, a shortcut on the desktop for Summation will be present. Click this shortcut to launch the Summation application, and log in with the “Application Database Administrator” account you created.



Please see Page 29 for information about what add-ons are needed for Internet Explorer.

Required Add-ons for Internet Explorer

To utilize all the features of Summation Express, Internet Explorer requires each of the following add-ons.

Other workstations that connect to the Summation Express machine will also need these Internet Explorer add-ons.

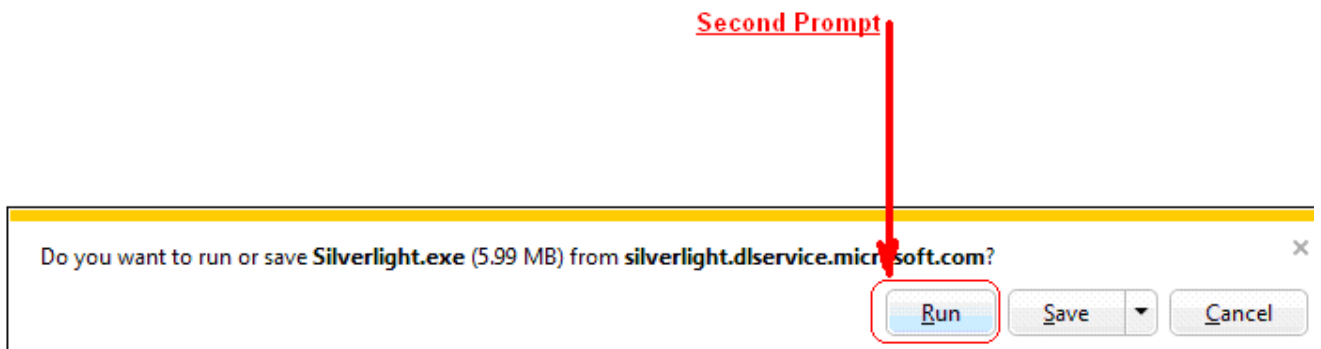
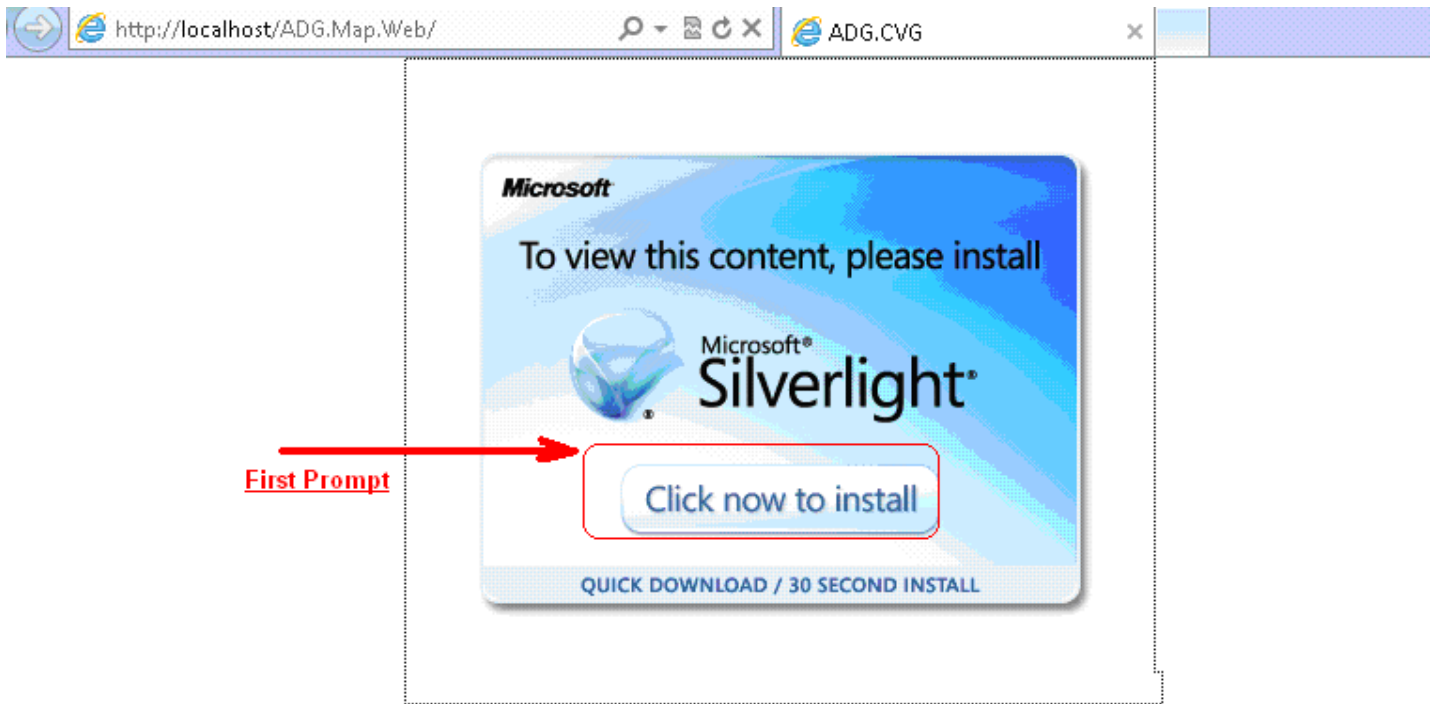
- Microsoft SilverLight 4
- Native Viewer 6.2
- OutsideX
- *Adobe Flash Player

*Please download and install the latest version of Adobe Flash player from Adobe's website (<http://get.adobe.com/flashplayer>). Adobe Flash Player is needed to support redactions and markups.

Except for Adobe Flash Player, all of the add-ons above can be installed through the Summation Express application.

Installing the Microsoft Silverlight Add-on

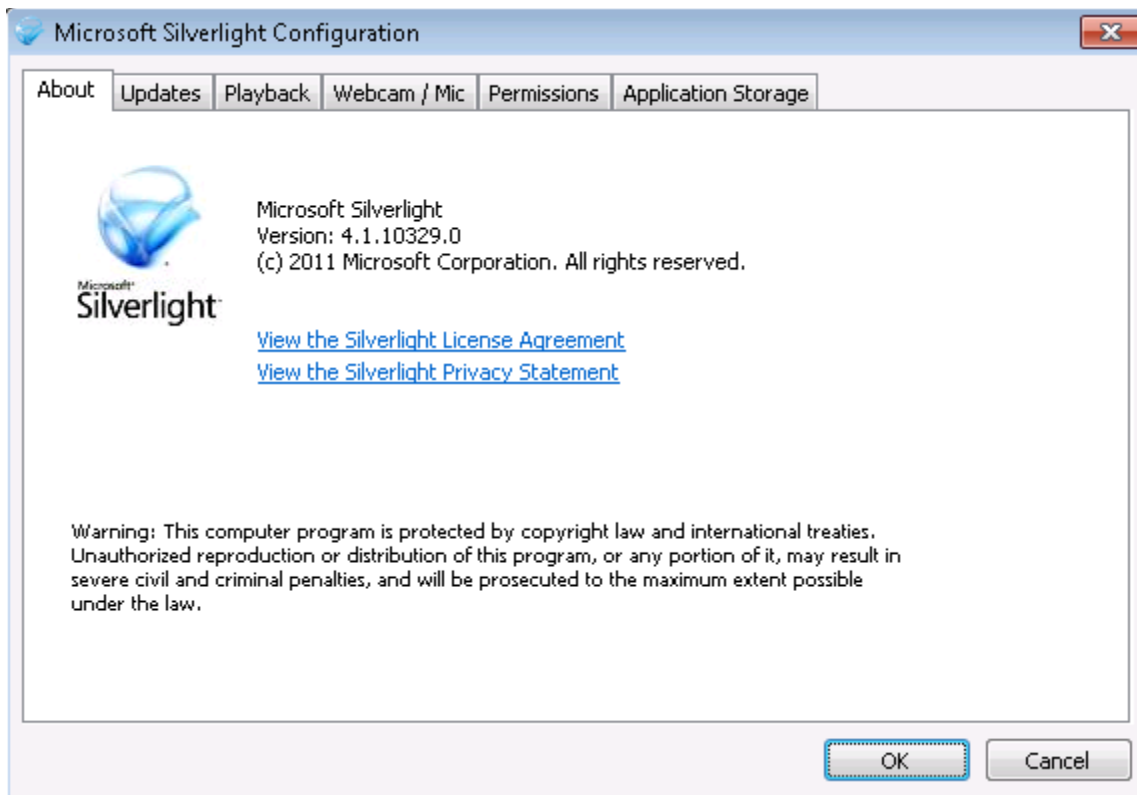
Upon first login, the Summation Express webpage will detect if a user's browser does not have Microsoft Silverlight 4 and will prompt the user to download that add-on. The Summation Express user should click the **Click Now to Install** button (first prompt in screenshot below), and then click **Run** (second prompt in screenshot below).



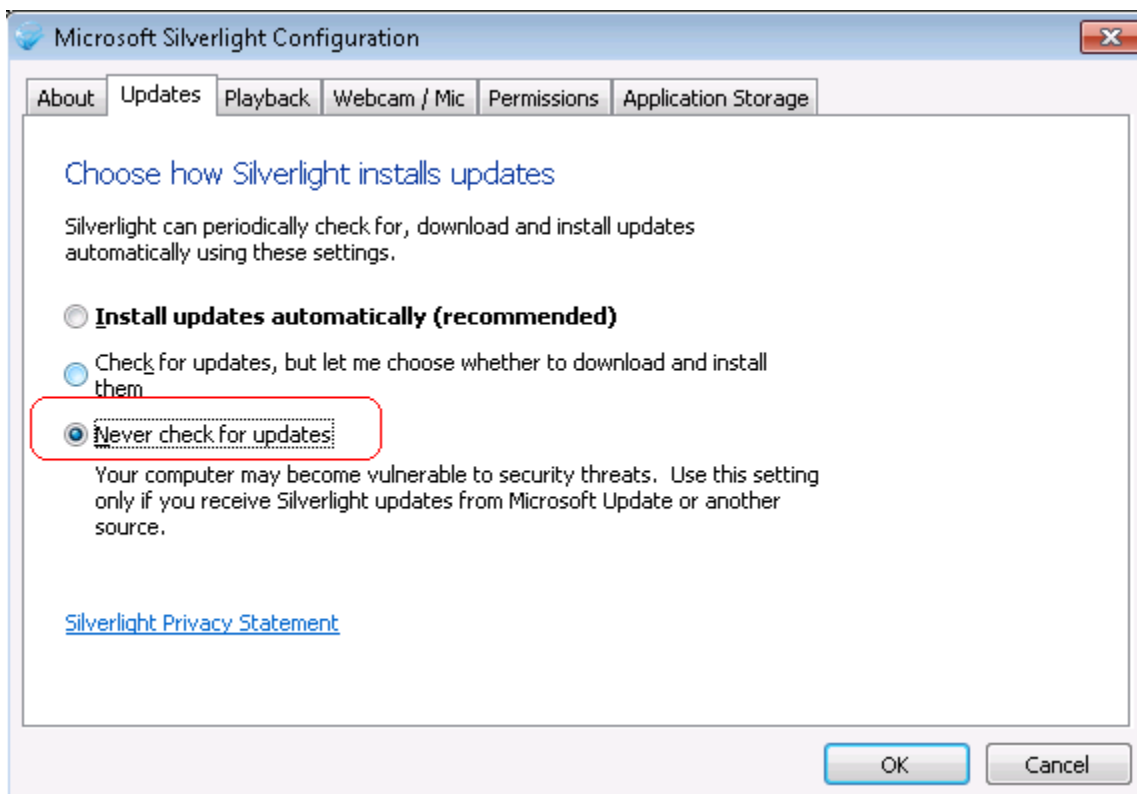
Disable Automatic Updates for Microsoft Silverlight

At this time, Summation Express requires version 4 of Microsoft Silverlight and is not compatible with Silverlight version 5. Please follow the steps below to disable automatic updates for Microsoft Silverlight.

1. **Start > All Programs > Microsoft Silverlight > Microsoft Silverlight.**
2. Note the version under the **About** tab.



3. If you are not on version 4.1.x, please uninstall Silverlight and reopen the Summation website to initiate a reinstall of Silverlight version 4.
4. Once you confirm you are on version 4.1.x please click the **Updates** tab within the **Microsoft Silverlight Configuration** tool.
5. Please check the radio button **Never check for updates** and click **OK**.



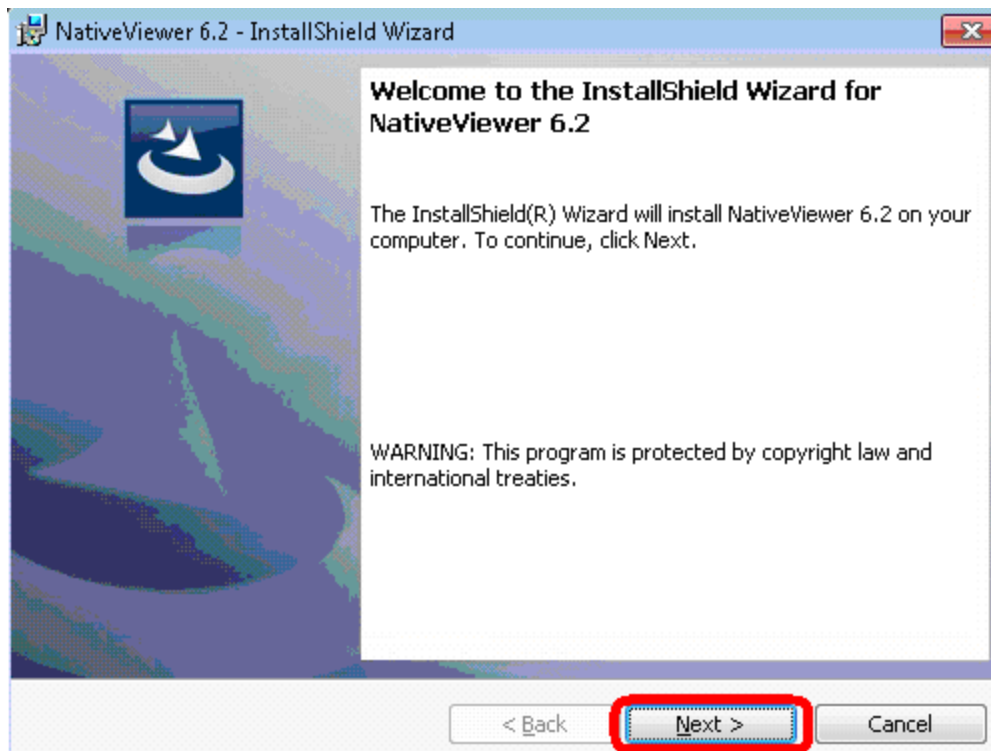
Installing the Native Viewer 6.2 Add-On

On the Summation Express machine, the Native Viewer 6.2 installer is found at the path below.

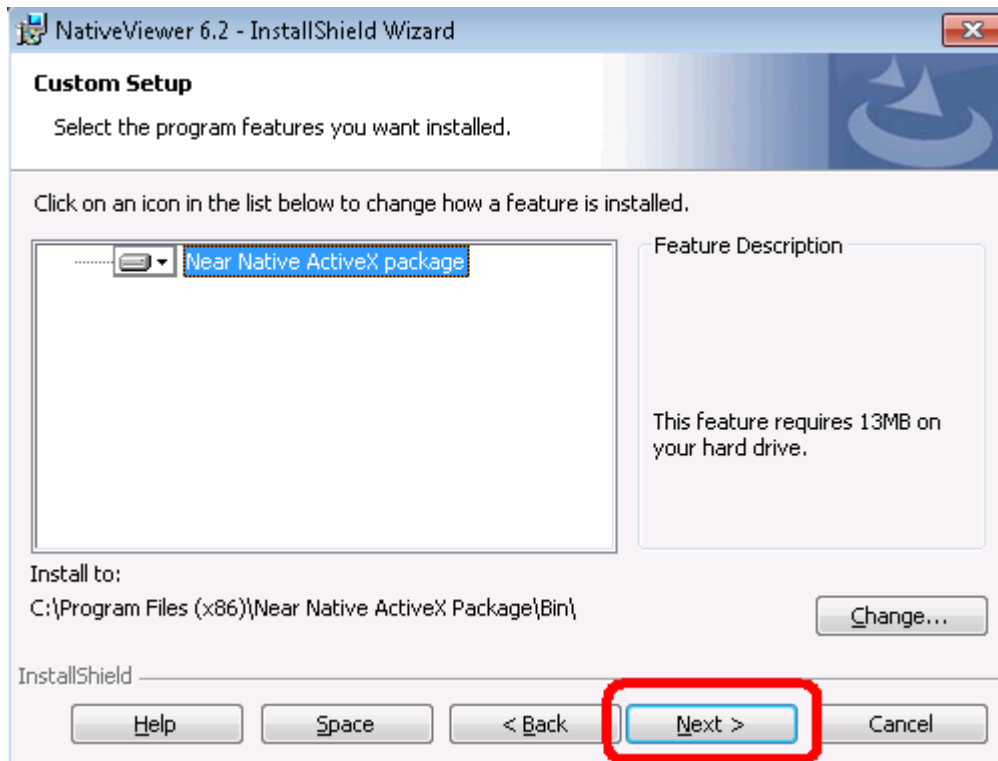
C:\Program Files (x86)\AccessData\Summation\NearNativeSetup.msi

Right-click on the NearNativeSetup.MSI file and select **Run As Administrator**.

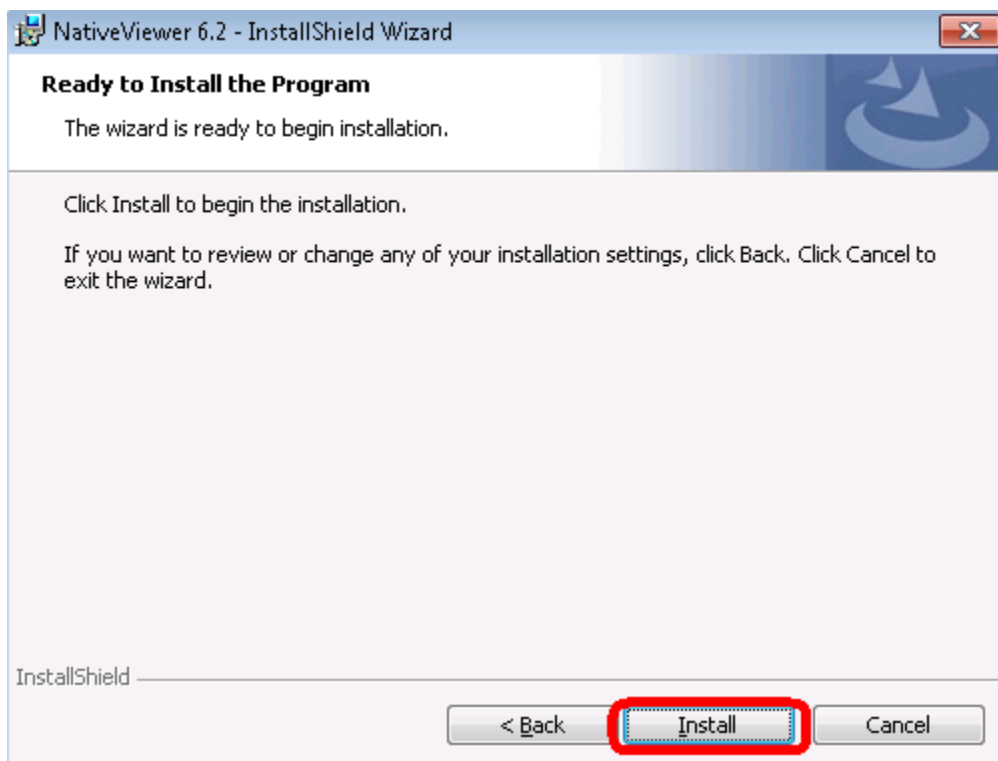
- 1) Click **Next** on the *InstallShield Wizard* dialog.



- 2) Click **Next**.



3) Click **Install**.



4) Allow the installation to proceed and then click **Finish**.

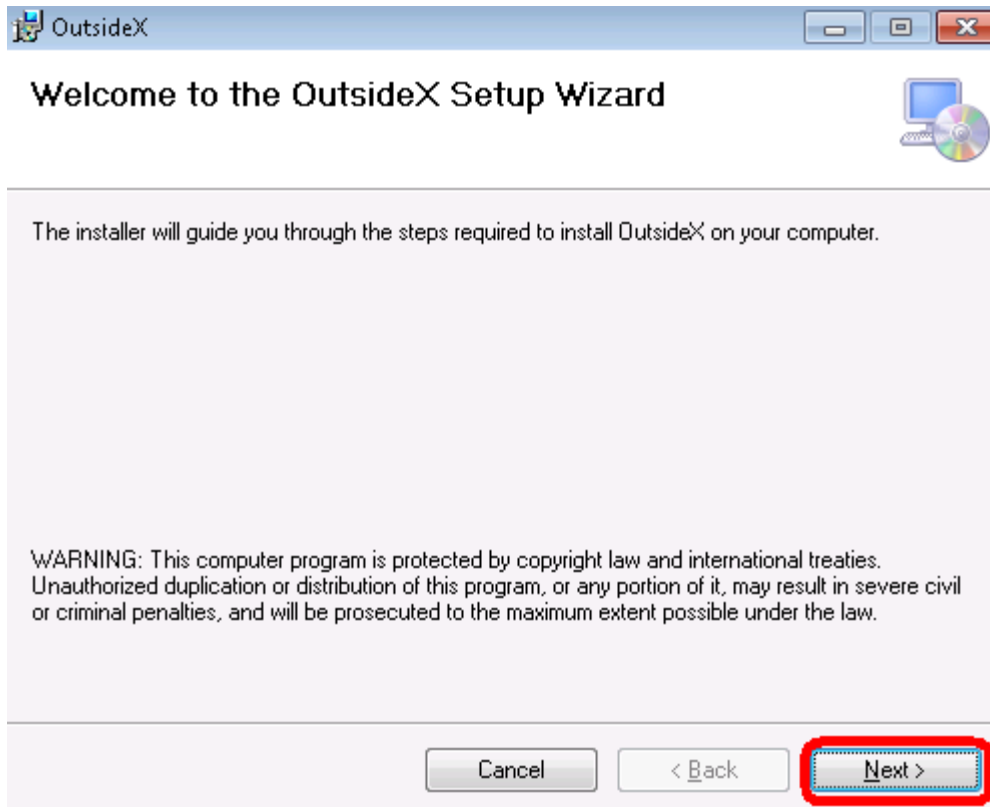
Installing the OutsideX Add-On

After the Native Viewer 6.2 add-on is installed, the OutsideX installer can be found at the path below.

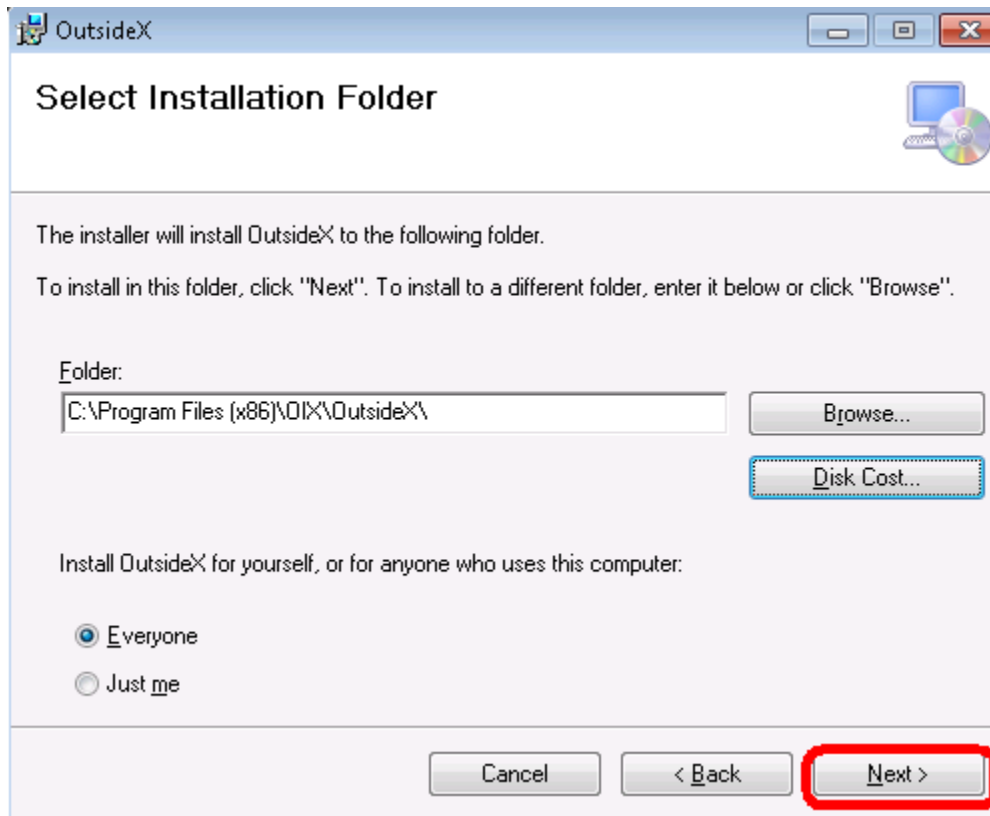
Please run the OutsideX.msi file and follow the prompts to install it.

C:\Program Files (x86)\Near Native ActiveX Package\Bin\Outsidex.msi

- 1) The *OutsideX Setup Wizard* should appear. Click **Next** to begin.



- 2) Click **Next**. The default setting of "Everyone" is recommended.



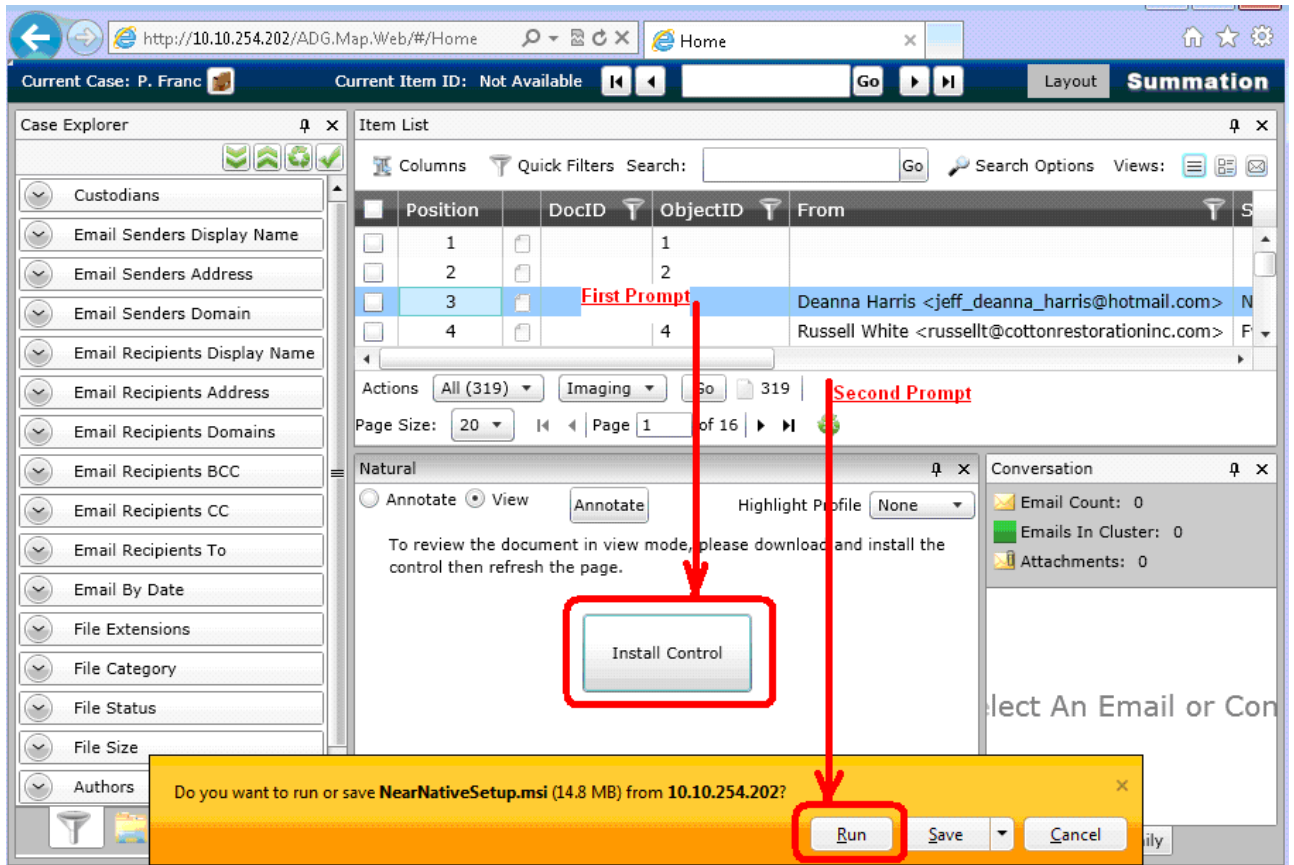
- 3) Click **Next**. After the OutsideX installation is complete, click **Close**.

You may also copy the two Windows Installer packages (NearNativeSetup.msi, Outsidex.msi) to a network location and run them on any computer that will be connecting to the Summation Express machine via Internet Explorer.

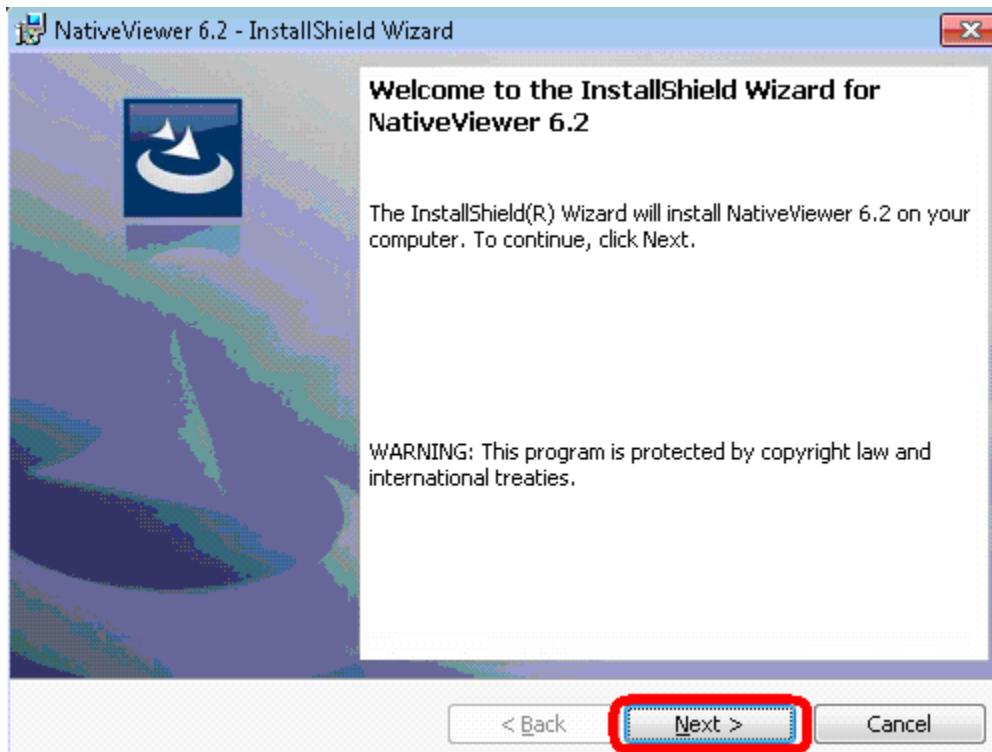
Automatic Installation of Native Viewer 6.2 and OutsideX Add-Ons

The Summation Express webpage will also initiate an installation of the Native Viewer and OutsideX add-ons if the Internet Explorer browser does not already have those add-ons installed. Below are the procedures to use on any workstation that will connect to the Summation Express machine's webpage.

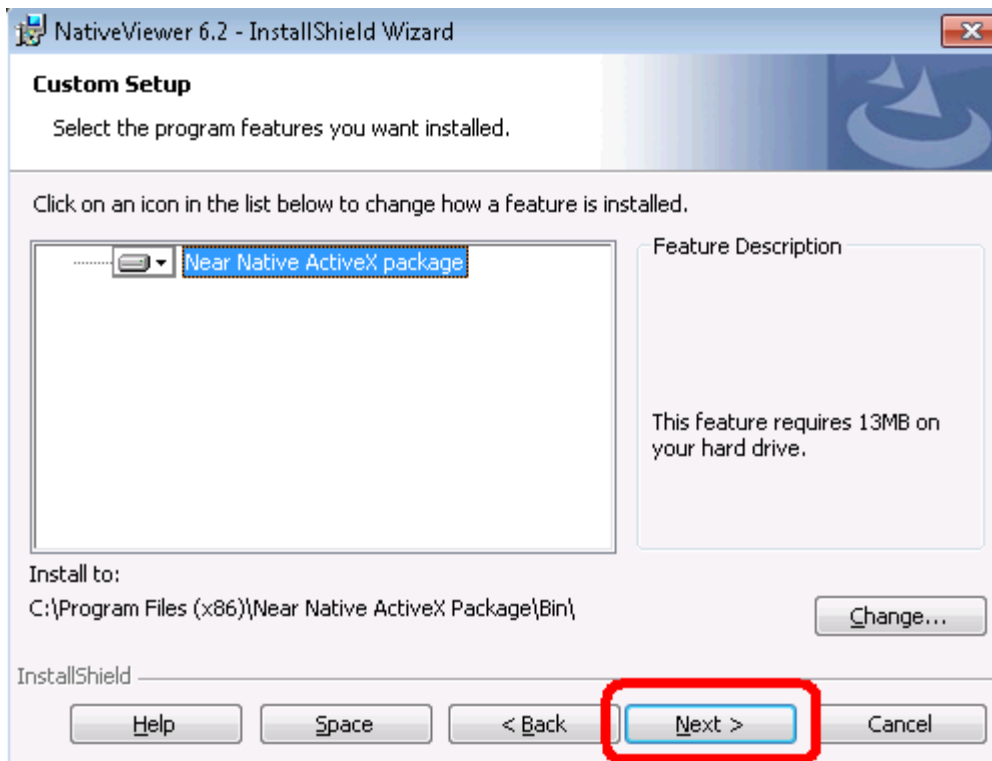
- 1) From any other workstation, connect to the Summation Express machine using Internet Explorer.
- 2) Open any case with records that are linked to native files.
- 3) Open the Natural panel. When the Natural panel opens, if the Native Viewer 6.2 is not installed, a prompt like below should appear within the viewer.
- 4) Click **Install Control** and then click **Run**.



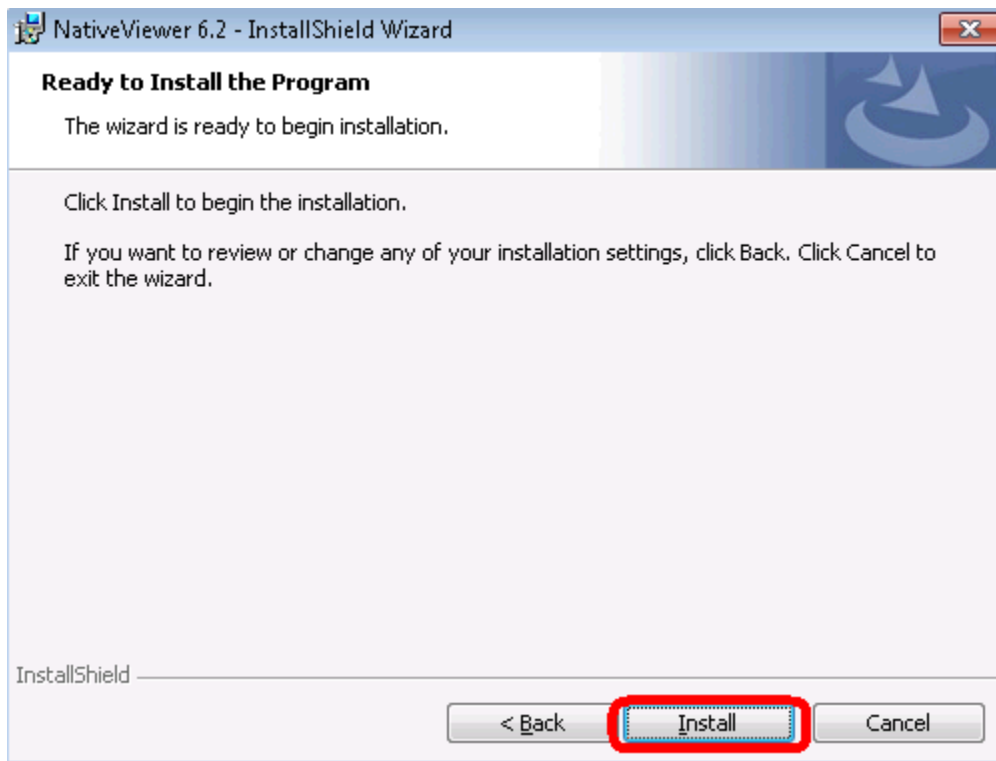
- 5) Click **Next** in the *InstallShield Wizard* dialog.



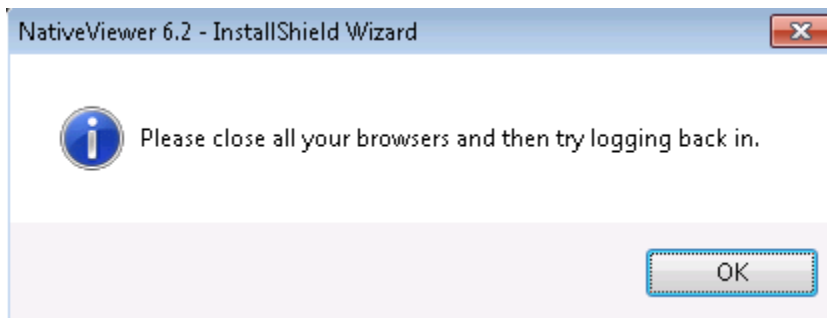
6) Click **Next**.



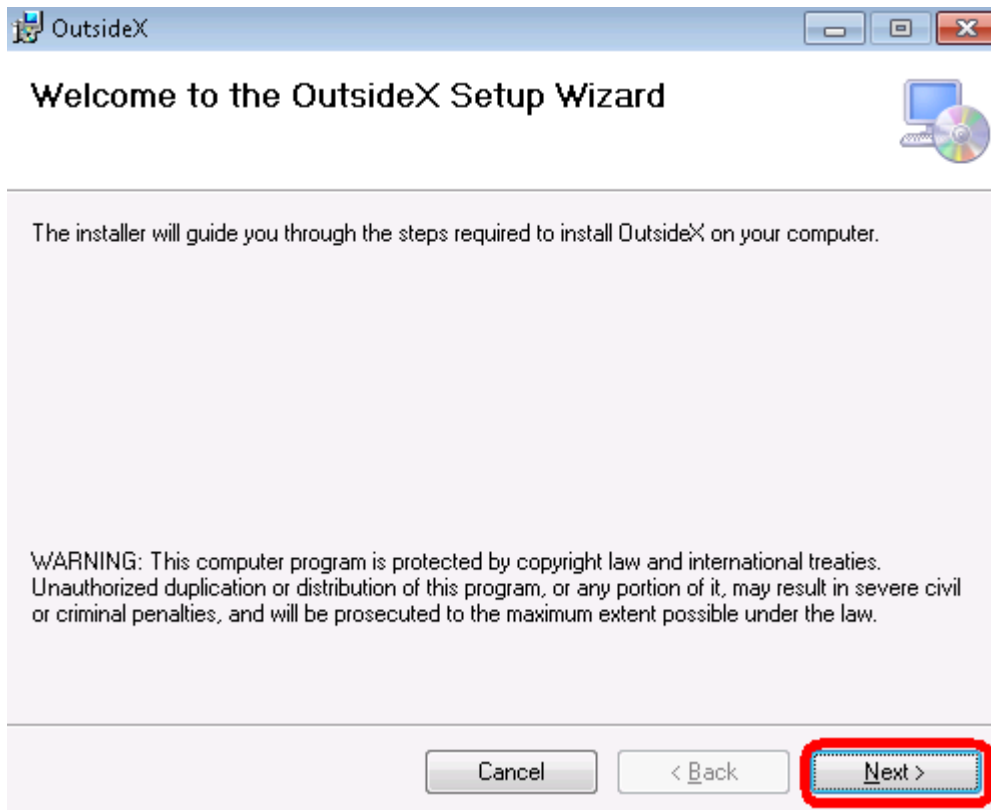
7) Click **Install**.



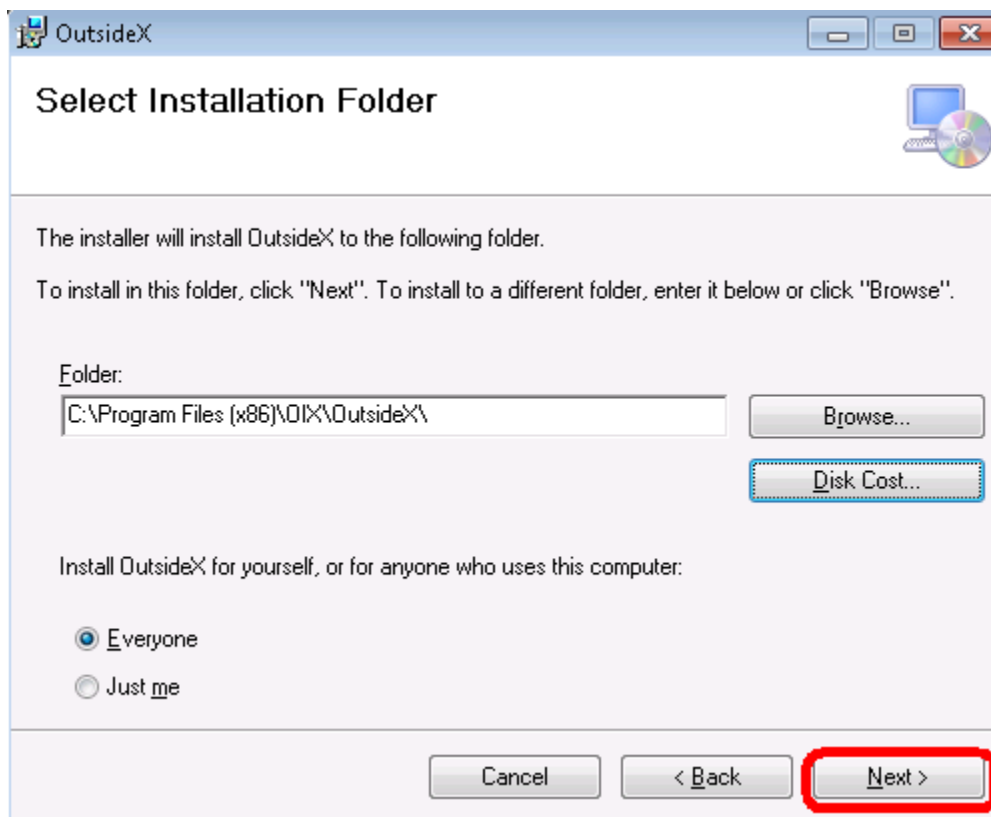
- 8) Allow the installation to proceed and then click **Finish**.
- 9) Click **OK** when prompted to “Please close all your browsers and then try logging back in.”



- 10) The *OutsideX Setup Wizard* should appear. Click **Next** to begin.



11) Click **Next**. The default setting of “Everyone” is recommended.



12) Click **Next**. After the OutsideX installation is complete, click **Close**.

13) Log-off of the Summation Express website.

14) Repeat steps 1, 2, and 3 (i.e. log on, open a case with native records, and open the natural panel).

Troubleshooting Section

Frequently Asked Questions

Installation Errors

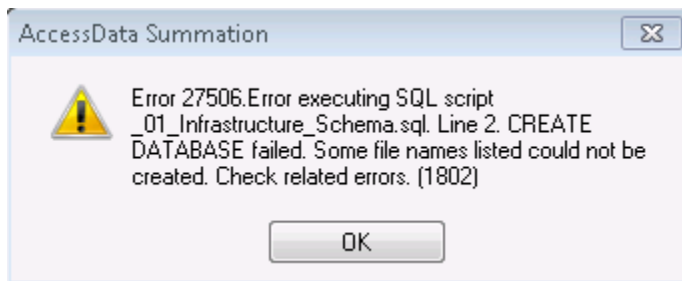
1) Q: After the BlackIce (ColorPlus printer driver) installer ran, the installation process seemed to stop. What should I do?

Q: At some point, the installation windows stopped appearing. What should I do?

A: This can mean that the installation process failed to initiate other necessary installers. Please re-run the Summation Express installer. The Summation Express installer will detect what has already been installed and continue installing the remaining components.

2) Q: I am seeing the following installation error when I submit a SQL Administrator password and click **Next** (step 2 of SQL Server Express setup on page 20).

Error 27506. Error executing SQL script _01_Infrastructure_Schema.sql. Line 2. CREATE DATABASE failed. Some file names listed could not be created. Check related errors. (1802)



A: The above error is occurring because the installer is unable to create a database named “Infrastructure” in SQL server. It may be that the “Infrastructure” database already exists. If you are attempting to reinstall Summation Express, then please perform the “Clean Uninstall” steps at the end of this Troubleshooting section and repeat the installation steps.

Summation Express Webpage Errors

1) Q: I am logging into the Summation Express website for the first time and, after login, I see a “Please Wait” prompt. Should I keep waiting?

A: You may disregard the *Please Wait* dialog. This issue is occurring because you do not have any cases listed in the left panel of the *Home* tab. Please follow the steps in your user guide to create a new case, and the *Please Wait* dialog should no longer appear in the right panel.

Browser address bar: <http://localhost/ADG.Map.Web/#/Home>

Page Title: AccessData Summation

Navigation: Home Management

User: SummationAdmin

Version Information

Create New Case

Search case names...

<input type="checkbox"/>	Case Name	Action	Status
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Page Size: 25 Total: 0 (✓ 0)

Processing Options Settings

Processing Mode


- Standard
- Standard No Search
- Forensic
- Quick

Optical Character Recognition

- Enable OCR

Email Body Caching

- Enable Email Body Caching

Please wait...


Document Deduplication

De-dup At:

- Case Level
- Custodian Level

De-dup

- Actual Files Only

Email Deduplication

De-dup At:

- Case Level
- Custodian Level

De-dup On:

- To
- From
- Subject
- CC

How to Uninstall Summation Express

To uninstall Summation Express, please follow the steps below.

1. Uninstall each of the following Summation Express components.
 - AD Evidence Pro Engine 10.1.1.9
 - AD Processing Services (64-bit) 4.0.2.176
 - AD Summation 4.0.2.55
 - AD WCF Services 4.0.2.55
 - AD Work Manager 4.0.2.55
 - CopyCase 4.0.2.38
 - Database configuration tool 1.0.0.25
 - SummationDesktop 4.0.2.55
2. Uninstall SQL server 2008 Express (listed as “MS SQL Server 2008 R2 (64-bit)”) and delete the “SQL server” folders found in “C:\Program Files” and “C:\Program Files (x86)”.

Note: If you have a SQL server instance that you do not want to uninstall, then login to your SQL server instance as a sysadmin and delete the following four databases that were created by the Summation Express installer.

- ADG (contains Summation Express cases)
- eDiscovery
- Infrastructure
- Workflow

3. Optional: You may also uninstall the following prerequisite add-ons.

Note: However, if you are planning to reinstall Summation Express, then you may also leave these in place and rerun the Summation Express installer. The Summation Express installer will detect what has already been installed and continue installing the remaining components.

- ColorPlus Printer Driver (BlackIce) v6.00.000
 - Prizm Content Connect Plus 64-bit
 - Prizm Content Connect Plus Configuration 5.0
 - MS .NET Framework 4 Client Profile
 - MS .NET Framework 4 Extended
 - MS CCR and DSS Runtime 2008 R3
 - MS Visual C++ 2005 Redistributable (x64)
 - MS Visual C++ 2008 Redistributable x64 9.0.30729.4148
 - MS Visual C++ 2008 Redistributable x86 9.0.30729.4148
 - MS Visual C++ 2010 Redistributable (x64) 10.0.30319
4. Optional: You may also uninstall the AD licensing tools, however if you have already activated a virtual license on this computer, it is recommended that you leave these programs.

- AD License Manager 3.1.3
- Codemeter runtime kit v4.40