



# SUMMATION PRO

# INSTALLATION AND UPGRADE GUIDE

MULTI-SERVER

VERSION 6.0

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## ABOUT THIS INSTALLATION GUIDE

This guide includes the steps you must follow in order to prepare for and perform a new installation or upgrade.

## OTHER GUIDES

### ABOUT THE SYSTEM SPECIFICATION GUIDE

Before installing Summation, review the system specifications and requirements for Summation Pro.

See the *System Maintenance Guide* available in the AccessData Help Center article [linked here](#).

### ABOUT THE SYSTEM MAINTENANCE GUIDE

For information about optimizing and maintaining your system after installation, see the *System Maintenance Guide* available in the AccessData Help Center article [linked here](#).

## OTHER RESOURCES

You can visit the AccessData Help Center for the following types of information:

- Informational videos [linked here](#).
- Product information [linked here](#).
- Knowledge base [linked here](#).
- Community forums [linked here](#)

## ABOUT INSTALLATION AND UPGRADE

### PLANNING FOR A NEW INSTALLATION

During installation, you will install several components which have hardware and software requirements. Make sure that you have adequate hardware and software resources before performing the installation.

When installing components, they can be all installed on one computer, or for greater performance, can be installed across multiple computers.

For more information on system components, their requirements, and strategies for implementation, see the *Summation Pro System Specification Guide* in the AccessData Help Center article [linked here](#).

### ABOUT AUTHENTICATION MODES

During the installation of the MAP component, you will have to specify one of the following authentication modes.

- **Forms Authentication** – User accounts are created and maintained within Summation Pro. When the user opens the AccessData Console, a page is displayed that prompts them for their username and password. There is no integration with Active Directory.
- **Integrated Windows Authentication** – The user will *not* be prompted for a username and password, instead, the application will leverage Windows Active Directory to authenticate the users against active directory. The web browser, through a cryptographic exchange, supplies the Windows user's information and authenticates against Active Directory. If the authentication exchange initially fails to identify the user, the web browser will prompt the user for a Windows account username and password. When using the AccessData Console to add permissions to users, the user must already exist in Active Directory.
- **Forms with Windows Authentication (Recommended)** – This is a hybrid method that requires log in credentials be entered regardless of being on or off domain. The user will be prompted for a username and password in Domain\User format and the application will authenticate them using an Active Directory or LDAP server. This must be configured in the application before authentication can be performed. For information on how to configure Active Directory authentication, see the AccessData Help Center article [linked here](#).

### ABOUT PERFORMING A NEW INSTALLATION

To perform a new installation, follow all of the tasks in this document with the exception of [Updating the Database Schema](#) which is only needed for an upgrade.

To perform a new installation, review and complete the following tasks:

- [Step 1. Pre-Installation Configuration](#)
- [Step 2. Installing SQL](#)

- [Step 3. Installing a License](#)
- [Step 4. Installing Components:](#)
  - [Database Configuration Tool](#)
  - [Application Database](#)
  - [Evidence Processing Engine](#)
  - [MAP](#)
  - [WCF Services](#)
- [Step 5. Post Installation](#)

## ABOUT PERFORMING AN UPGRADE

If you are performing an upgrade, you perform most of the same steps as a new installation with a few differences.

To upgrade, you do not need to uninstall any components. When you install the new version's components, the previous version will be upgraded to the new version.

To perform an upgrade, do the following:

1. Make sure that your system complies with the requirement in the [Step 1. Pre-Installation Configuration](#) section.
2. If you already have SQL installed, skip the instructions for [Step 2. Installing SQL](#).
3. For licensing, install the latest versions of the Code Meter and License Manager as explained in the [Step 3. Installing a License](#) section.  
If the same version is already installed, you will be notified by the wizard and you can cancel the installation.
4. Install the application components as described in the [Step 4. Installing Component](#) section.
  - a. Install the latest version of the Database Configuration Tool as described in the [Database Configuration Tool](#) section.  
  
This will upgrade the tool to the required version in order to update the database schema.
  - b. As part of the upgrade, you must update your database schema as described in the [Updating the Database Schema](#) section.
  - c. Follow the rest of the installation steps.

## STEP 1. PRE-INSTALLATION CONFIGURATION

### SERVICE ACCOUNT

AccessData Summation Pro requires the use of a single, preferably dedicated, Windows account to operate properly. This account is the “Service Account”.

In a multi-server installation environment, a domain-level (Active Directory) Service Account is required. AccessData will only support Workgroup authentication in single-server installation environments. In either case, the Service Account must be a local administrator on each of the servers hosting components with both “Logon as Service” and “Interactive Logon” system permissions.

AccessData recommends configuring the password of the Service Account to never expire and to not allow modification. Changing the password of the Service Account after installation will require the reinstallation of some components.

The SQL Instance hosting the SQL Database component must have the Service Account added to the Logins and provided sysadmin rights.

To create the service account in Active Directory:

1. Login to the Active Directory Server as an Administrator.
2. Open the Active Directory Users and Computers object.
3. In the Active Directory User and Computers dialog, navigate to the *Users* object.
4. Right-click **Users**.
5. At the menu, choose **New >User**.
6. In the *New Object - User* dialog, create the Summation Service account.  
For example, name the service account Summation Service with the User logon name of SummService.
7. Click **Next**.
8. At the next dialog, make sure that the password has been entered correctly, and that both *User cannot change password* and *Password never expires* are checked.
9. Click **Next** at the next dialog.
10. Click **Finish**.
11. Log out and log in as the service account.

## FIREWALL

[DISABLE COMPLETELY OR CREATE RULES]

Run the following command from the Windows Command Prompt with Admin rights to disable the firewall completely on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> netsh advfirewall set allprofiles state off
```

## USER ACCESS CONTROL

Run the following command from the Windows Command Prompt with Admin rights to set User Access Control to “Never Notify” on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> %windir%\System32\reg.exe ADD  
HKLM\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System /v  
EnableLUA /t REG_DWORD /d 0 /f
```

**NOTE:** THIS MODIFICATION REQUIRES A REBOOT TO TAKE EFFECT.

## INTERNET EXPLORER ENHANCED SECURITY CONFIGURATION

On computers running Windows Server, disable Internet Explorer Enhanced Security Configuration by following the instructions in the article [linked here](#).

## IPV6

Summation Pro solution does not use IPv6 for communication and AccessData recommends disabling IPv6 if it is not otherwise required.

Run the following command from the Windows Command Prompt with Admin rights to disable IPv6 on Microsoft Windows Server 2008 R2 and Microsoft Windows Server 2012 R2:

```
C:\> REG ADD "HKLM\System\CurrentControlSet\services\TCPIP6\Parameters"  
/v "DisabledComponents" /t REG_DWORD /d 4294967295 /f
```

**NOTE:** THIS MODIFICATION REQUIRES A REBOOT TO TAKE EFFECT.



## ANTI-VIRUS SOFTWARE

AccessData strongly recommends that any anti-virus or anti-malware software on any each server hosting components of the AccessData Summation Pro solution are configured to disable on-access scanning of the directories or drives containing case files, database files, or temp/log files. Additionally, should any full scans be scheduled, they should be monitored to ensure they are not interfering with the overall performance of the solution.

For Microsoft SQL Information, see <http://support.microsoft.com/kb/309422>

## WINDOWS OPTIMIZATIONS

For information on optimizing the Microsoft Windows operating system, see the AccessData Help Center article [linked here](#).

## STEP 2. INSTALLING SQL

### MICROSOFT SQL SERVER

To install Microsoft SQL server 2008 R2, see the AccessData Help Center article [linked here](#).

To install Microsoft SQL server 2012, see the AccessData Help Center article [linked here](#).

### NAMED PIPES PROTOCOL

To enable Named Pipes protocol, see the AccessData Help Center article [linked here](#).

### MSDTC

To configure Microsoft Distributed Transaction Coordinator (MSDTC) correctly, see the AccessData Help Center article [linked here](#).

## STEP 3. INSTALLING A LICENSE

To use the product, you must have a valid license. To have a valid license, you must do one of the following:

- If you are using a CmStick dongle for licensing, plug it into an appropriate USB port of the physical machine.
- If you are using a Virtual Dongle for licensing, you will need to activate the Virtual Dongle.

You must install the following licensing software.

- CodeMeter Runtime
- AccessData License Manager

### CODEMETER

To install CodeMeter:

1. Run *CodeMeterRuntime64.exe* as an Administrator.
2. Complete the CodeMeter Runtime Kit Setup Wizard.  
For more information, see the AccessData Help Center article [linked here](#).

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### VIRTUAL DONGLES

To activate a virtual dongle in both online and offline modes, see the AccessData Help Center article [linked here](#).

### LICENSE MANAGER

To install License Manager:

1. Run *LicenseManagerInstall.exe* executable as an Administrator.
2. Complete the License Manager Install Wizard.  
For more information, see the AccessData Help Center article [linked here](#).

## STEP 4. INSTALLING COMPONENTS

### DATABASE CONFIGURATION TOOL

Install the Database Configuration Tool on the server that will be hosting the WCF component.

To install the Database Configuration Tool:

1. If you have not already done so, log in using the service account.  
See [Service Account](#).
2. Run *AD\_Database Configuration Tool.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
3. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
4. Review and accept the License agreement and click **Next**.
5. Select MSSQL Server database connection and click **Next**.
6. Adjust the destination folder if necessary and click **Next**.
7. MSSQL ONLY: Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.
  - **NOTE: THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:**  
**HOSTNAME\INSTANCENAME, PORT**
  - **INSTANCENAME AND PORT ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.**
8. Wait for the Database Configuration Tool to install and click **Finish** to close the Install Wizard.
9. The Database Configuration Tool should have opened automatically. Click **Add Configuration**.
10. Choose the appropriate Database Type, enter the Server Name, and check Create Database.
  - **NOTE: THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:**  
**HOSTNAME\INSTANCENAME:PORT**
  - **INSTANCENAME AND PORT ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.**
11. Choose the authentication mode the Database Configuration Tool will use to create the ADG database and enter the credentials (if necessary).

12. Enter the credentials you wish to use to create the Application Administrator account and click **Create**.

NOTE: THESE CREDENTIALS WILL BE CAPABLE OF LOGGING INTO THE APPLICATION. IF YOU PLAN TO USE INTEGRATED WINDOWS AUTHENTICATION, IT IS RECOMMENDED THAT YOU CREATE THE APPLICATION ADMINSTRATOR USING THE SERVICE ACCOUNT’S CREDENTIALS.

13. Wait for the Database Configuration Tool to create the database, confirm that the **Default** checkbox is checked and the **Database Version** displays “5.10.11.0.”

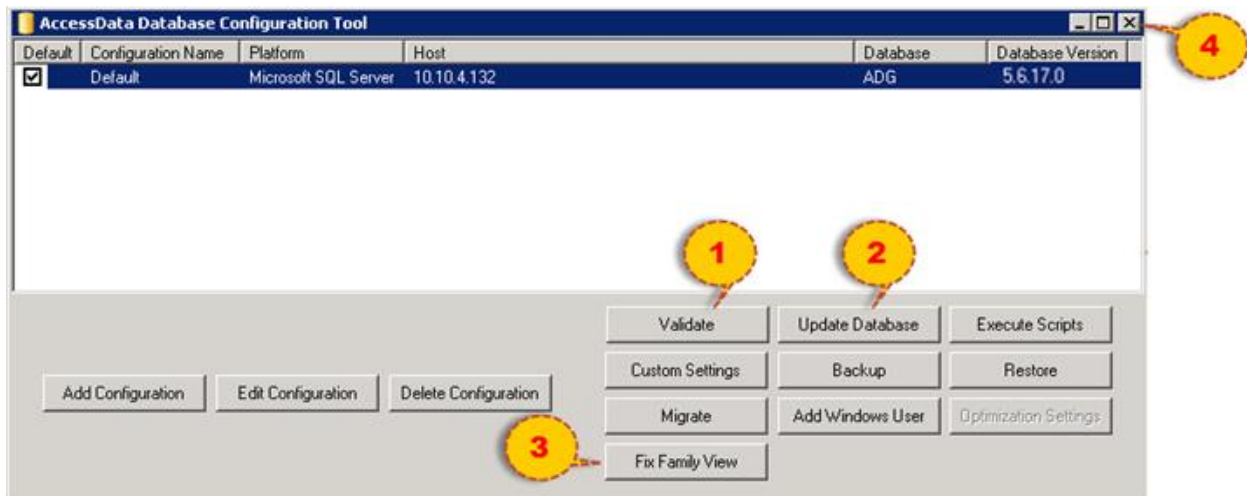
**NOTE:** WHEN UPGRADING, PROCEED TO THE NEXT SECTION “UPDATING THE DATABASE SHEMA. FOR NEW INSTALLS, CLOSE THE DATABASE CONFIGURATION TOOL AND PROCEED TO “APPLICATION DATABASE” SECTION.

## UPDATING THE DATABASE SCHEMA

**IMPORTANT** This section is only necessary for upgrading existing Summation Pro installations to the current version. For new installs, proceed to the [Application Database](#) section.

Before upgrading the existing database schemas to the current version, it is strongly recommended that full backups be taken. This can be done using the **Backup** button in the Database Configuration Tool or through SQL Server.

1. If the Database Configuration tool is closed, navigate to **C:\Program Files\AccessData\DBConfigTool** and open **DBConfig.exe** as administrator.



2. Validate the current database by clicking **Validate**.

3. Select all checkboxes in the upper-most section, select the Authentication Mode for your database and enter the credentials (if necessary), and click **Validate**.

**Validate Database**

- ClearEmptyDatabases
- FixSequences
- RebuildMissingIndexes
- FailAllHungJobs
- ValidatePermissionsAndVersions
- RemoveAbandonedObjectData
- ApplyAddendums
- FixFTKFilterMRUdefaultDates

Evidence Database, e.g. ADG

Authentication Mode: Windows Authentication

System User: sa

System Password:

Application Databases, e.g. Ediscovery

Server Name: 10.10.4.132    Port: -1    User:

Authentication Mode: Windows Authentication    Password:

Validate

**NOTE:** MORE INFORMATION ON EACH OF THE OPTIONS IS [linked here](#).

4. Once the validation is complete, click the **Update Database** button.

5. Fill in the following sections:

- a. **Backup path** –UNC path that database server must have write access to backup path. This feature will create a SQL Backup (.BAK) of all your cases and ADG database. (Recommended).
- b. **Authentication Mode** – Choose between Database Server Authentication or Windows Authentication.
- c. **Backup Application Database (Recommended)** - Creates SQL Backup (.Bak) for the Application Databases (eDiscovery, WorkFlow, WorkFlow40, Infrastructure). You can also choose a different type of Authentication for backing up the Application Databases.

6. Click **Update**.

7. When the update is complete, click **Fix Family View**. This will repair any known issues necessary.

## APPLICATION DATABASE

Run the Application Database Installer on the server that hosts the Database Configuration Tool.

To install the Application Database:

1. In the App\_DB folder, run setup.exe as an Administrator. The Application Database Install Wizard will appear. Click **Next**.
2. Review and accept the License agreement and click **Next**.
3. Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.
  - **NOTE: THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:**  
**HOSTNAME\INSTANCENAME, PORT**
  - **INSTANCENAME AND PORT ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.**
4. Click **Install**, wait for the Application Database Installer to complete the installation, and click **Finish** to close the Install Wizard.
5. Open Windows Explorer and navigate to **C:\ProgramData\AccessData\**. Open the most recent UpgradeAppDBLog.txt file and confirm that there were no errors reported.

## EVIDENCE PROCESSING ENGINE

The Evidence Processing Engine can be installed and run in one of the following modes:

- Local - The Local Processing Engine should be used whenever both the WCF Services (including Async and Work Manager) and the Processing Engine are being hosted on the same server.
- Distributed - Dedicated servers can be used to distribute and speed up processing.
  - The Distributed Processing Manager should be installed on the same server as WCF Services.
  - The Distributed Processing Engines should be installed on dedicated processing servers.

For more information on system components, their hardware and software requirements, and implementation options, see the *System Specification Guide* in the AccessData Help Center article [linked here](#).

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## LOCAL PROCESSING ENGINE

To install a Local Processing Engine:

1. Run the *AccessData Evidence Processing Engine.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Set the **Processing Temporary Folder** to point to the **ADTEMP** folder, set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.
6. Click **Install**, wait for the Evidence Processing Engine installer to complete, and click **Finish** to close the Install Wizard.

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## DISTRIBUTED PROCESSING MANAGER

To install a Distributed Processing Manager:

1. On same server that you will install WCF Services, run the *AccessData Distributed Processing Manager.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.



6. Enter the credentials for the service account and click **Next**.
7. Click **Install**, wait for the Distributed Processing Manager installer to complete, and click **Finish** to close the Install Wizard and open the Distributed Processing Manager Configuration.
8. Enter the IP address and click Add for each Distributed Processing Engine server.
9. Click **Done**. The service may take a few minutes to restart before the window closes.

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## DISTRIBUTED PROCESSING ENGINE

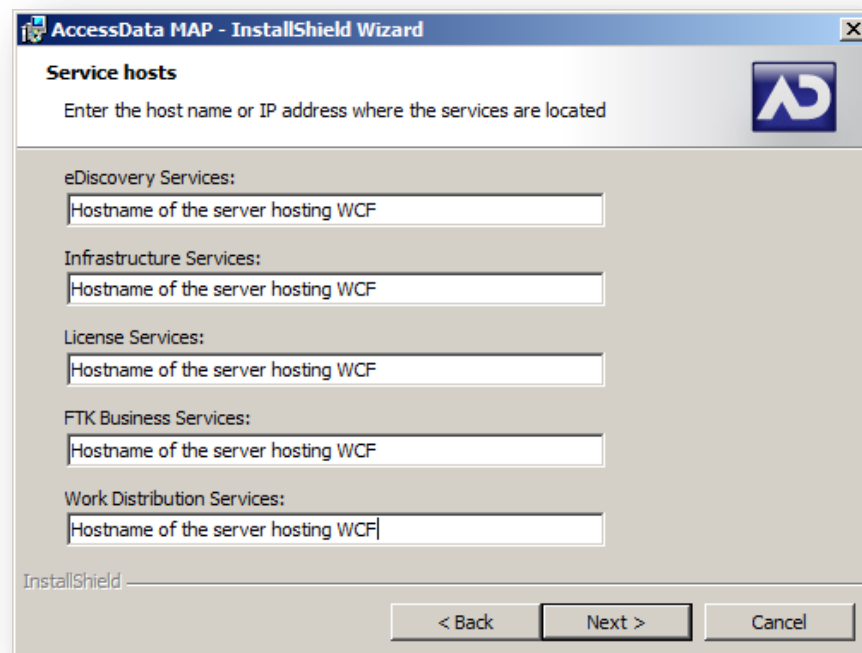
To install a Distributed Processing Engine:

1. On a dedicated processing server, run *AccessData Evidence Processing Engine.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary, select the **Install as a distributed processing engine** option and click **Next**.
5. Set the **Processing Temporary Folder** to point to the **ADTEMP** folder, set the **Processing State Folder** to point to the **PSTATE** folder, and click **Next**.
6. Click **Install**, wait for the Evidence Processing Engine installer to complete, and click **Finish** to close the Install Wizard.

## MAP

To install MAP:

1. Run *AccessData MAP.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. The Database Configuration Tool Install Wizard will appear. Click **Next**.
3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Enter the correct service host information and click **Next**.

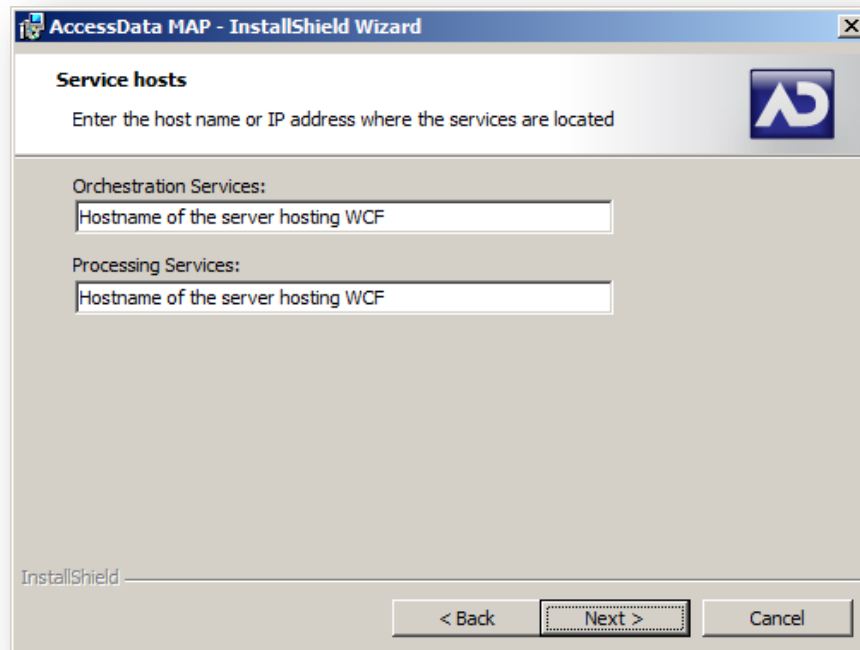


The screenshot shows the 'Service hosts' page of the 'AccessData MAP - InstallShield Wizard'. The window title is 'AccessData MAP - InstallShield Wizard'. The page is titled 'Service hosts' and contains the instruction: 'Enter the host name or IP address where the services are located'. There is an AccessData logo in the top right corner. Below the instruction, there are five text input fields, each with a label and a placeholder text 'Hostname of the server hosting WCF':

- eDiscovery Services:
- Infrastructure Services:
- License Services:
- FTK Business Services:
- Work Distribution Services:

At the bottom of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted. The 'InstallShield' logo is visible in the bottom left corner of the dialog area.

6. Enter the correct service host information and click **Next**.



**NOTE:** WHEN INSTALLING MAP TO THE SAME SERVER AS WCF, PROCESSING SERVICES MUST BE SET TO **LOCALHOST**.

7. Do the following:
  - a. Enter the **User Name**, **Domain**, and **Password** of the Service Account.  
See [Service Account](#).
  - b. Select the **Authentication Type** that will be used to log into Summation Pro.  
See [About Authentication Modes](#).
  - c. Click **Next**.
8. Enter the database server information, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.
  - **NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:  
**HOSTNAME\INSTANCENAME, PORT**
  - **INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.
9. Click **Install**, wait for the MAP installer to complete, and click **Finish** to close the Install Wizard.

## WCF SERVICES

To install WCF Services:

1. Run *AccessData WCF Services.exe* as an Administrator. The Install Prerequisites page will appear. Click **Install**.
2. Wait for the prerequisites to install. An alert message may appear if the server has a pending restart. Reboot the server before continuing the installation. The WCF Services Install Wizard will resume its progress automatically following the reboot.

**NOTE:** ATTEMPTING TO FORCE INSTALLATION WITH A PENDING RESTART CAN CAUSE SERIOUS AND SUBSTANTIAL DAMAGE THE OPERATING SYSTEM.

3. Review and accept the License agreement and click **Next**.
4. Adjust the destination folder if necessary and click **Next**.
5. Choose Complete and click **Next**
6. Enter the **User Name**, **Domain**, and **Password** of the Service Account. Click **Next**.
7. Enter the URL of the Known File Filter service.

**NOTE:** IF THE WCF SERVICES ARE INSTALLED ON A SERVER OTHER THAN THE SERVER HOSTING THE KFF SERVICE, THE URL CANNOT USE **LOCALHOST**.

8. Set **Use Certificates for SiteServer/Agent** to **No**, clear the **Network port used to communicate with SiteServer** and **Host name used to communicate with SiteServer** fields, and click **Next**.
9. Uncheck the **Allow Collection Type Work Orders** and **Allow Site Server Work Orders** options and click **Next**.

10. Enter the correct service host information.

- **IMPORTANT!** DURING A NEW INSTALLATION OR UPGRADE, YOU MUST PROPERLY SET THE LOCATION OF SOME SERVICES. STARTING WITH VERSION 6.0, THE FOLLOWING SERVICES ARE CONSOLIDATED INTO THE EDISCOVERY SERVICES.
  - Work Distribution Services
  - License Services
  - Infrastructure Services (next screen)

During an installation or upgrade, you are still prompted to enter the locations of these legacy services. You must configure the location for these three services so that they match the location of your 6.x eDiscovery Services computer.

- New 6.0 installation:

You must use the same location for Work Distribution Services and License Services as the eDiscovery Services computer.

**Service hosts**

Enter the host name or IP address where the services are located

eDiscovery Services:

Work Distribution Services:

Orchestration Services:

License Services:

PSS Atlas Sync Services:

LawDrop Server "domain/IP" address

InstallShield

< Back    Next >    Cancel

- Upgrade from 5.x to 6.x

When you installed 5.x versions of Summation and eDiscovery, you could specify a unique location for each of the services. During a 5.x to 6.x upgrade, those previous services locations are carried through.

If you specified a different location for any of these three legacy services, during the upgrade you must change them so that they match the location of your 6.x eDiscovery Services computer.

- The *LawDrop Server* setting lets you share files stored in your LawDrop with users outside of the system. This setting needs to be edited with either the domain or the IP address of the server running MAP not just “localhost”.

11. Click **Next**.

12. Enter the correct service host information and click **Next**.

The screenshot shows a dialog box titled "Service hosts" with a sub-header "Enter the host name or IP address where the services are located". The dialog contains five text input fields, each with a label above it: "Infrastructure Services:", "FTK - Services:", "Async Processing Services:", "Integration Services:", and "Processing Manager:". The "Infrastructure Services:" field is highlighted with a red rectangular border. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

**IMPORTANT:**

- INFRASTRUCTURE SERVICES MUST BE SET TO THE SAME AS THE EDSICOVERY SERVICES ON THE PREVIOUS SCREEN.
- PROCESSING MANAGER MUST BE SET TO **LOCALHOST**.

13. Click Next.

14. MSSQL ONLY: Enter the database server information, ensure **Use Integrated Security** is unchecked, choose the authentication method the installer will use to connect to the database, enter the credentials (if necessary), and click **Next**.

- **NOTE:** THE SYNTAX FOR THE DATABASE SERVER TEXTBOX IS:

**HOSTNAME\INSTANCENAME, PORT**

- **INSTANCENAME** AND **PORT** ARE OPTIONAL AND ARE ONLY NECESSARY WHEN USING A NAMED INSTANCE OR A CUSTOM PORT.

15. Click **Install**, wait for the WCF Services installer to complete, and click **Finish** to close the Install Wizard.

16. A reboot dialog will appear. Click **OK** to reboot the server.

## STEP 5. POST INSTALLATION

### BASIC ACCEPTANCE TESTING

1. Confirm the function of the Async app pools:
  - a. Open Internet Explorer on the server hosting Async.
  - b. Navigate to <http://localhost/AccessDataGroup/Router.svc>.
  - c. Navigate to <http://localhost/AsyncProcessingServices/Import.svc>.
2. Log in to Summation Pro with the Super Admin account.
3. Check the System Log for errors.
4. Perform basic testing tasks: (for instructions, see the product *Admin Guide* and *Reviewer Guide*)
  - a. Set the default project paths.
  - b. Create a new project.
  - c. Create a custom checkbox field.
  - d. Ingest evidence into the project.
  - e. Import a DII load file into the project.
  - f. Create a label.
  - g. Perform a quick search.
  - h. Bulk-label the search results.
  - i. Produce the labeled records.
  - j. Delete the project.