# Summation Express Install Guide

AccessData
*A Pioneer in Digital Investigations Since 1987*

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# AccessData Legal Information and Contact Information

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## Legal Information

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# Introduction

This *Summation Implementation Guide for Summation Express* will provide steps for*:*

- Identifying prerequisites for installation.
- Installing licensing software (CodeMeter and AccessData License Manager).
- Installing supporting programs and applications for Summation Express.
- Installing and configuring Microsoft SQL 2008 Express (if needed).
- Installing Summation Express.

**Note:**   This document presumes that the installer has an intermediate level of proficiency with Microsoft Windows. This installation involves working with storage and security requirements at a workstation and server level.

# Chapter 2
# Getting Started

## Minimum Prerequisites

Summation Express is supported on the following operating systems:

- Windows Server 2008 R2 64-bit SP1
- Windows 7 Professional 64-bit SP1
- Windows 7 Professional 32-bit SP1
- Windows XP Professional 32-bit SP3

Summation Express should only be installed on one machine, regardless of the operating system installed. Before installing Summation Express on a server or a workstation, please consider the following:

- CodeMeter and AccessData License Manager needs to be pre-installed.
- Summation Express should be installed on the workstation that will function as the Evidence Processing computer.
- If you are using the three-node option, 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.
- The Summation Express workstation should have Microsoft Outlook 2007 installed on it.   Outlook is used for Production Sets when exporting to MSG and PST formats.
- At least 50GB of free space is required on the Operating System drive for the *BlackIce* imaging temp directory.
- At least 100GB of free space on the same drive is required for the Summation Express installation.
- At least 2GB of RAM per logical processor is required.

**Prerequisites**

| Operating System | Hardware | Configuration |
| --- | --- | --- |
| Windows Server 2008 R2 Standard 64-bit SP1 | IntelXeon Quad-core (8-cores)<br>16GB RAM<br>10,000 RPM | Summation Express<br>(Supports 3 Concurrent Users) |
| Windows 7 Professional 64-bit SP1 | IntelCore i5 (4-cores)<br>8GB RAM<br>7,200 RPM | Summation Express<br>(Single User - only **one** user is supported when using Windows 7) |

| Windows XP Professional 32-bit SP3 | Dual Core 2GB RAM 7,200 RPM | Summation Express (Single User - only **one** user is supported when using Windows XP) |

**WARNING:   Please ensure that the chosen workstation or server meets the specifications above.   If it is later found to be necessary to change workstations, you MUST contact your sales representative to obtain a new license. The license key given by the sales representative is bound to the hardware of the machine and CANNOT be reused on new hardware once entered. Technical Support may be reached at 800.786.2778 (North America) / 415.659.0105. Further hours and contact information are located at http://accessdata.com/support/technical-customer-support.**

**Note:**   For more information about virtual license dongles, please see the following document: http://accessdata.com/downloads/media/VCM_Activation_Guide.pdf

# Downloading the Summation Express Installer Package

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

**To install the Summation Express installer package**

1.  Download the installer package from http://accessdata.com/support/product-downloads/summation.
2.  Extract the downloaded ZIP file to a folder on the local machine.

# Chapter 3
# Initial Configuration

## Initial Configuration

The workstation that will have Summation Express installed to it will require some initial configuration. Please ensure that there is not a Group Policy in place that could prevent a change to any of the following:

- Disable the Windows Firewall (Installation ONLY).
- Disable any Antivirus software (Installation ONLY).
- Configure the Distributed Transaction Control setting.
- Change User Access Control to Never Notify.

## Disabling the Windows Firewall

Please follow the steps below to disable the Windows firewall.

**To disable the Windows firewall**

1. Navigate to the *Control Panel*.
2. Open **System and Security**, then **Windows Firewall**.
3. Note the workstation's current settings if desired.
4. Choose **Turn Windows Firewall on or off.**
5. In the **Customize settings for each type of network**, choose the **Turn off Windows Firewall** option for all locations and click **OK.**

## Disabling the Antivirus Software

As with any software that is installed, please disable any antivirus software prior to installation.   As necessary, please log on as a local administrator to disable such software, taking note of any non-default settings.   Be sure to enable it promptly afterwards.

## Configuring the Distributed Transaction Control Setting

Once the firewall and the antivirus software have been disabled, configure the distributed transaction control setting.

**To configure the distributed transaction control setting**

1. Click **Start**.
2. Click **System and Security**, then **Administrative Tools**.
3. Choose **Component Services**.
4. In the *Component Services* window, click through **Component Services> Computers > My Computer> Distributed Transaction Coordinator> Local DTC.**
5. Right click **Local DTC** and choose **Properties**.
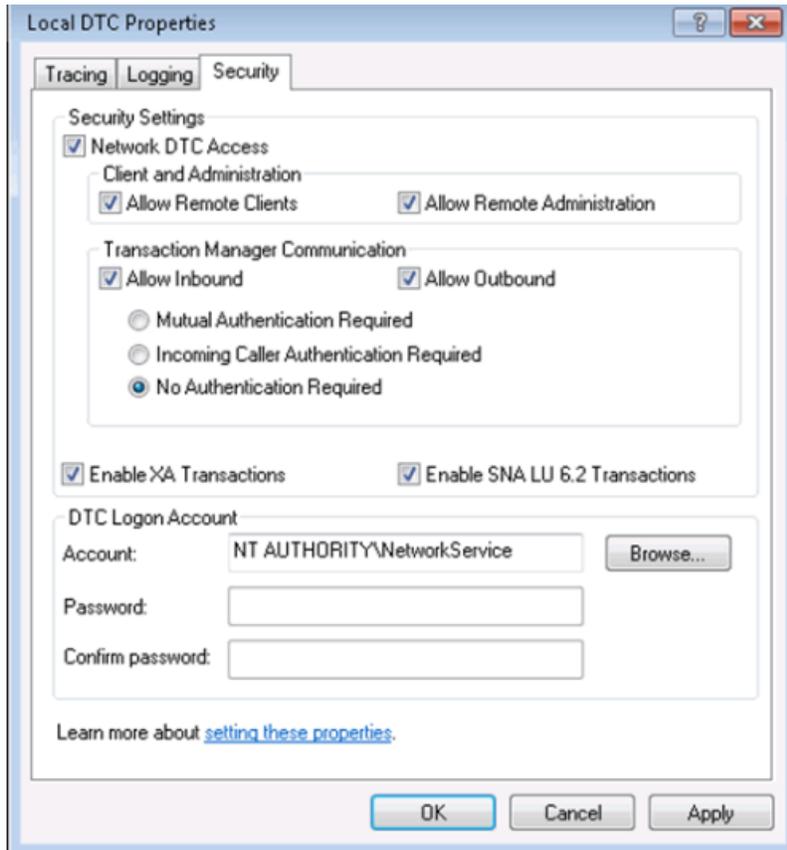


6. In the *Local DTC Properties* pop-up dialog, choose the *Security* tab.
7. Check **Network DTC Access, Allow Remote Clients, Allow Remote Administration, Allow Inbound, Allow Outbound, No Authentication Required, Enable XA Transactions, Enable SNA LU 6.2 Transactions.**
8. The DTC Logon Account should be NT AUTHORITY\Network Service.
9. Click **OK** to exit - no reboot is necessary.

# Changing the User Access Control (UAC)

Next, change the User Access Control to Never Notify.

**To change User Access Control to Never Notify**

1. Navigate to the *Control Panel*.
2. Open **System and Security**, then **User Accounts**.

3. Open **User Accounts** again.
4. Click **Change User Account Control settings.**
5. Move the slider bar down to **Never Notify**.
6. Reboot your workstation (even if not prompted).

# Chapter 4
# The Summation Service Account

## The Summation Service Account

The workstation that will have Summation Express installed to it requires a Windows account to run the Summation application and its various functions. This account is referred to as the service account.

Following are the criteria that this account must have:

- Local Administrator privileges.
- A password that never expires and never requires changing.

If documents are to be accessed on the network, it is recommended that an account be created in Active Directory to serve as the service account.

See [Creating the Service Account in Active Directory](#) .

Otherwise, create the service account on the local workstation.

See [Creating the Service Account on the Local Workstation](#) .

## Creating the Service Account in Active Directory

If documents are to be accessed on the network, it is recommended that an account be created in Active Directory to serve as the service account.

**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. 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**. Return to the local workstation's console to continue with installing Summation Express. See [Installing Summation Express](#) .

# Creating the Service Account on the Local Workstation

If there is no domain present or the Summation Express application is only to be used on a single workstation, then the Service Account may be created on the local workstation.

**To create the service account on the local workstation**

1. Go to the Windows **Start** menu, right-click **Computer**, and select **Manage**.

2. In the *Computer Management* dialog, expand the **Local Users and Groups** file.

3. Right-click **Users**.

4. Select **New User.**

5. In the *New Object - User* dialog, enter the **User** name, **Full name**, and **Description**. Make sure that the password has been entered correctly, and that both **User cannot change password** and **Password never expires** is checked. Click **Create**.

6. The fields will then clear if the user was created successfully.

7. Click **Close** and the account will appear in the list of local users.

Once the service account is created, you need to install CodeMeter.

See [Installing CodeMeter](#) .

# Chapter 5
# Installing CodeMeter

When you purchase Summation Express, AccessData provides either a USB CmStick with the product package or a license key sent via email to the purchaser. To use either the CmStick or the license key (virtual dongle), you must first install the CodeMeter Runtime software. The latest version of CodeMeter is included with the current build of Summation Express. If it is not present, please download the latest version of CodeMeter Runtime from `http://accessdata.com/support/product-downloads`.

Under *CURRENT RELEASES*, navigate to **CODEMETER** and select the **Download** option next to *CodeMeter Runtime 4.5.0b (64 bit).*

Once the CodeMeter software has been accessed, install CodeMeter.

**To install CodeMeter**

1. Run the executable file. The *CodeMeter Runtime Kit Setup Wizard* will appear. Click **Next**.
2. Review and accept the license agreement, and click **Next.**
3. In the *Installation Scope* dialog, fill in the **User name** and **Organization** information and click **Next**.

    **Note:** It is recommended to keep the default option of **Install for all users of this machine**.

4. Review the *Custom Setup* dialog. Please note the space required on the workstation's hard drive, then click **Next.**
5. Click **Install**.
6. Click **Finish.**

# Chapter 6
# Installing License Manager

In addition to CodeMeter, License Manager needs to be installed. As with CodeMeter, the latest version of License Manager is included with the current build of Summation Express. If it is not present, please download License Manager Version 3.1.5 from http://accessdata.com/support/adownloads. Under the appropriate License Manager drop-down, navigate to *License Manager* and select the **Download** option next to *License Manager version 3.1.5.*

**To install License Manager**

1. Run the License Manager Install.exe file.   The *License Manager Install Wizard* will appear. Click **Next.**

2. Review and accept the License agreement and click **Next.**

3. On the *Destination Folder* dialog, click **Next**. If you need to define a different destination folder, click **Change**.

   Note: It is recommended that the default location be selected.

4. Click **Install.**

5. Click **Finish**.

   If using a CmStick, plug it into an appropriate USB port of the physical machine. Otherwise, see Chapter 7. Activating a Virtual Dongle License to setup Summation to work with the license key sent by the AccessData Sales Representative.

# Chapter 7
# Activating a Virtual Dongle License

If you are using a Virtual Dongle for licensing, you will need to do the following to activate the license.

**Note:** If a physical dongle is to be used, please plug in the dongle before running License Manager and skip steps 2 through 7 below.

**To activate the license with a virtual dongle**

1. Click **Start > Programs > AccessData > License Manager**. Click the **License Manager** icon.
2. An *Error Message* prompt saying **No Security Device Found!** will appear. Disregard and click **OK**.
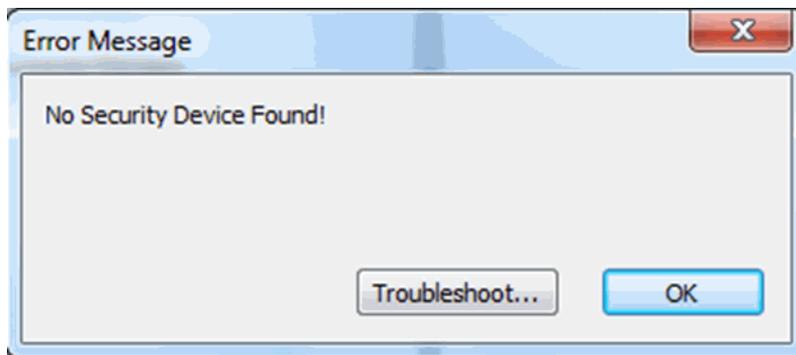


3. Select **Create A Local Virtual CMStick** and click **OK**.
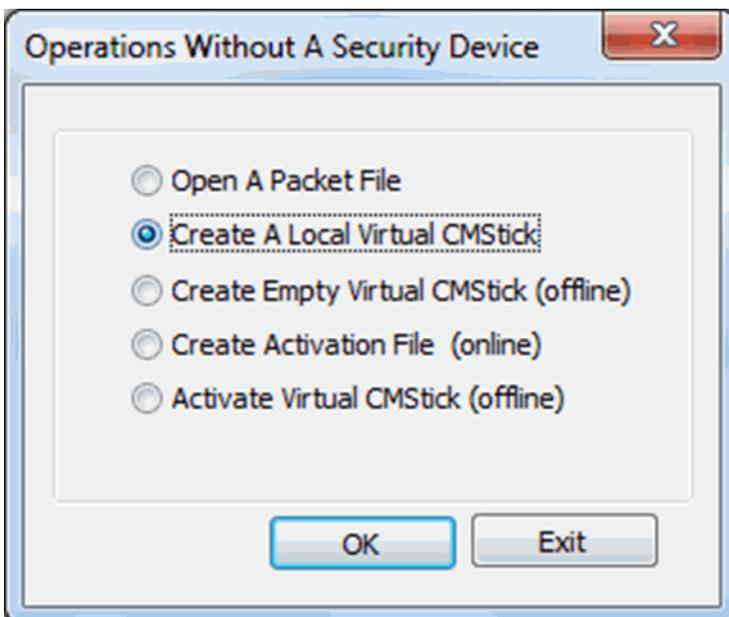
4. Please enter the confirmation code as indicated in the dialog below. This code was sent by the AccessData Sales Representative in an email confirming the purchase of Summation Express.

> **Note:** This step requires the Summation Express system to have an Internet connection. Before continuing, ensure that the system has an active internet connection.
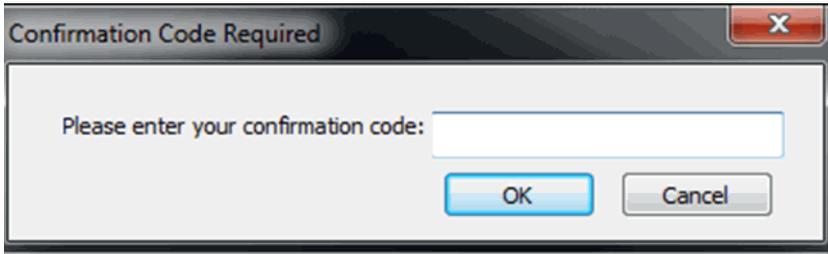
5. License Manager will automatically synchronize with the License Server over the internet.
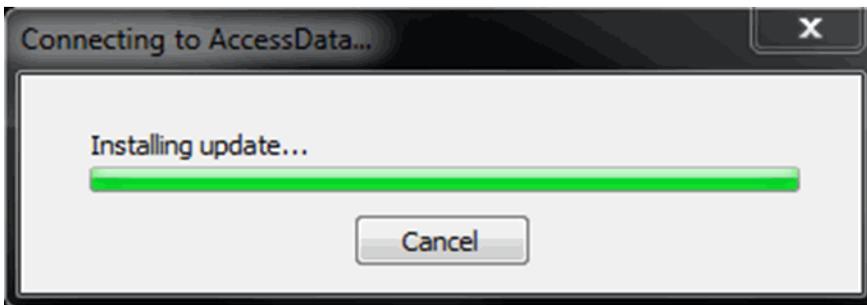
6. Click **OK** after receiving the *Packet Update Successful!* message.
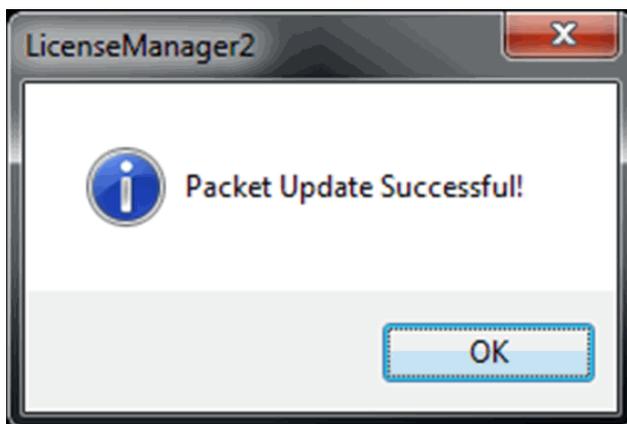
7. Click **OK**.
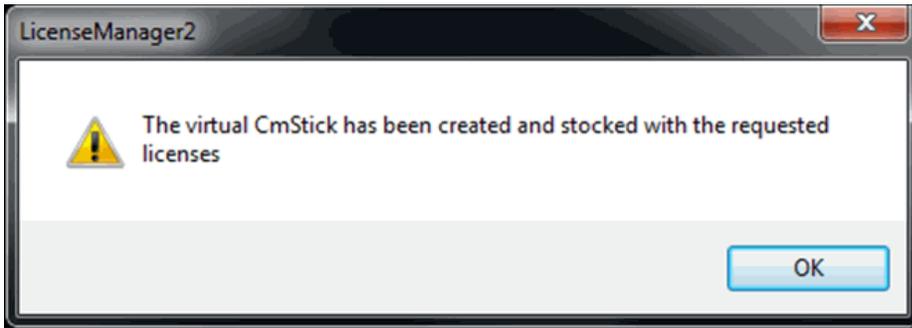
8. A new dialog box will appear. Click on the *Licenses* tab and note the Serial Number
   - If the licenses do not appear, click the **Refresh Device** button.

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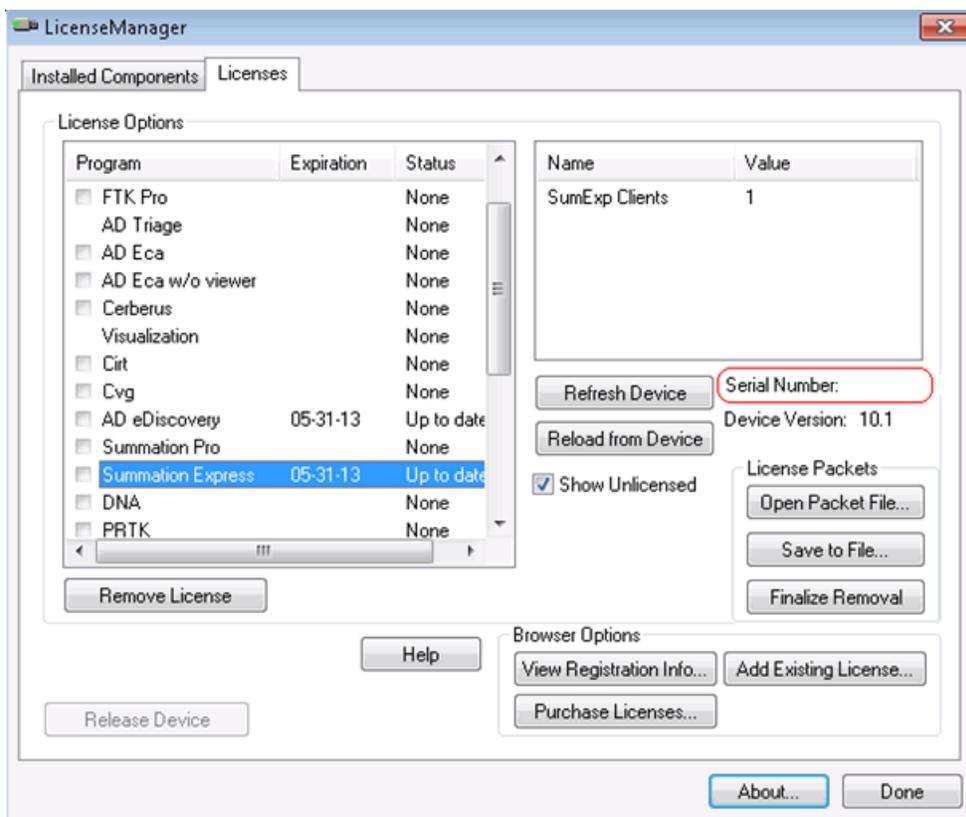


9. The Summation Express license is now active. Click **Done.**

**Note:** Please be aware that, after activation, the Summation Express license will be bound to the machine and cannot be moved. This note does not apply to physical dongles.

# Chapter 8
# Installing Summation Express

**Important: If upgrading from an earlier version of Summation, please STOP and refer to the following document: http://www.accessdata.com/support/product-downloads/summation, Scroll to CURRENT RELEASES, choose 64 or 32 bit and click on the Upgrade guide link. Please contact Summation Technical Support at 800.786.2778 (North America) / 415.659.0105 with any questions. Further hours and contact information are located at http://accessdata.com/support/technical-customer-support.**

Once licenses are installed, you are ready to install Summation Express.

Please allow 30 to 60 minutes to complete the installation process. The SQL installation and its configuration take approximately 20-30 minutes, depending on if SQL is installed to the workstation or not. Various dialog boxes will appear during some portions of the install. This is normal. A reboot may occur partway through the installation. This is expected.

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

- Microsoft Visual C++ 2010 x86 on x64 and x64 (Redistributable)
- Microsoft Visual C++ 2008 x86 on x64 SP1 (Redistributable)
- BlackIce Multiple Cores Client x64(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 64 bit version)
- Microsoft SQL Server 2008 Express Edition (if SQL is not already installed to the workstation)
- Summation Desktop (the Summation Express host application)
- AccessData CopyCase (copies cases from one Summation install to a secondary installation)
- AD Migration Toolkit (moves cases from iBlaze 3.1 and Enterprise 2.7.1 to Summation Express)

**Note:** Some of these programs install additional functionality separate from the main program. Please take note of the currently installed list of installed programs on the workstation prior to installation.

**Important: Save all other work and exit other applications before installing Summation Express.**

### To install Summation Express

1. Log in to the Summation Express machine using the service account credentials.
   See Chapter 4, *The Summation Service Account.*
2. Click **Start** > **Computer**.
3. Locate the **AccessData Summation Express (64 bit).exe** executable and right-click.

4. Select **Run as administrator.**

5. A screen will appear with a list of prerequisites for Summation Express to run.

6. Click **Install**.   See Installing Summation Express .

7. The installation process will attempt to install BlackIce (ColorPlus Printer Driver).

    If there is less than 50 GB of free space on the Operating System drive, you will get a warning dialog.

8. Click **Yes** to continue with the installation or **No** to exit.

    The BlackIce installer will complete and the installation will continue installing/enabling the other listed prerequisites if not already present on the computer.

9. Depending on the workstation's configuration, you may see a message to restart the computer.

10. Press any key or click **Yes** when ready and log back in with the account credentials.

    See Chapter 4, *The Summation Service Account.*

    After the prerequisites are installed and configured, and if the workstation has restarted from the reboot, you may get a warning that the *Publisher could not be verified.*

11. Click **Run**.

    The Summation Desktop installer begins.

12. Click **Next**.

    The installation checks your computer's memory. You are recommended to have 2GB of memory per logical processor. Depending on the workstation configuration, you may get a dialog reporting your computer's memory.

13. Click **OK** to continue the installation or **Cancel** to exit.

14. Click **Next.**

15. A dialog box appears, asking to install either **MSSQL** or **Postgres** for the database engine. If this is your first install of Summation Express on the system, you may choose PostgreSQL or MS SQL for the installation. If you have had a previous installation of Summation Express with a MS SQL database on the system, you can install Summation with MS SQL Express for the database engine.

    To install Summation with a PostgreSQL database, click here.

    To install Summation with a MS SQL Express database, click here.

# Installing Summation with PostgreSQL

In the Summation installation, when you select **Postgres**, the wizard will continue to install Summation Express with the PostgreSQL database.

**To install the PostgreSQL database**

1. A dialog appears, asking to choose the destination folder. Leave the default location for the installation unchanged and click **Next**.

2. At the next prompt in the wizard, click **Install**. This will install both PostgreSQL 9.1 and Python 3.2.

3. Click **Next**.

4. Accept the license agreement to continue and click **Next**.

5. Leave the default location for the installation unchanged and click **Next**. If you need to change the location that the application is installed to, click **Change** and specify a different path.

6. Leave the default location for the data folder unchanged and click **Next**. If you need to change the location that the data folder is installed to, click **Change** and specify a different path.

7. In the *PostgreSQL User Create* dialog, create the password and confirm the password. The administrator user name for the PostgreSQL database is **Postgres** .

8.  At *the PostgreSQL Port* dialog, make sure that the **Port** field contains the value 5432 and click **Next**.

9.  At *the Ready to Install the Program* prompt, click **Install**.

10. At the InstallShield Wizard prompt, click **Finish**.

11. Once PostgreSQL has finished installing, the install will ask you for *User Credentials*.

12. Enter user name, domain and password information for the service account.
    See [The Summation Service Account](#) .

    - **User Name**: The Summation Service account name - what was used to login to Windows to install Summation Express.

    - **Domain**: If the service account was created on the local workstation, then leave the domain blank.

    - **Authentication type:**   Select **Forms authentication**.

    - **Postgres Port:** The port field should be 5432.

13. Select **Next**.

14. At the *Ready to Install the Program* prompt, click **Install**.

15. At the *Install Wizard Completed* prompt, click **Finish**.

16. See [Creating the ADG Database for PostgreSQL](#).

## Creating the ADG Database for PostgreSQL

Once PostgreSQL and Summation Desktop have been installed, the AccessData Configuration Tool will appear. You will use this tool to create the ADG Database, the ADG54 Database Schema, and Super Admin User for the program.
**To create the ADG Databases**

1.  In the *AccessData Database Configuration Tool*, select and highlight the Connection Profile for PostgreSQL. Click **Edit Configuration**.

2.  In the *Database Information* dialog, enter in the information asked for to create the ADG Database, ADG Database Schema, and Super Admin User for the program. The following table lists the information that you need to enter in the specified fields.

**Database Information Fields**

| Field Name | Information |
| --- | --- |
| **Configuration Name** | Choose an appropriate name or just leave as **Default**. |
| **Database Type** | Leave as **Postgres.** |
| **Server Name: Port** | The Postgres server instance name. This should auto-populate with the name of the name of the workstation. |
| **Database Name/SID** | Leave as **ADG** - This is the name of the database that will hold the Summation case data. |

| | |
|---|---|
| **Database Schema** | Leave as **ADG54**. |
| **Authentication Mode** | Leave as **Database Authentication**. |
| **Database Password** | This password should automatically populate. |
| **Create Database** | If Summation Express is installed as an upgrade, leave this option unchecked. If this is a new installation of Summation Express, check this option. |
| **Authentication Mode** | Leave as **Database Authentication**. |
| **System User** | Enter **Postgres** for the system user. |
| **System Password** | The complex password defined for the **PostgreSQL** user. |
| **Install WordNet** | Select this box. |
| **Application Admin:** | Enter an appropriate user name here. This user name will become the first named user of the Summation Express application. This user will have administrative privileges and will be used to log into Summation Express for the first time. |
| **Application Password** | A password for this user. |

3. Select **Create**.
4. Close the *AccessData Configuration Tool* window.
5. You will be prompted to reboot the system. Click **Ok**.

# Installing Summation with MS SQL Express

In the Summation installation, when you select **MSSQL**, the wizard will continue to install Summation Express with the MS SQL Express database.
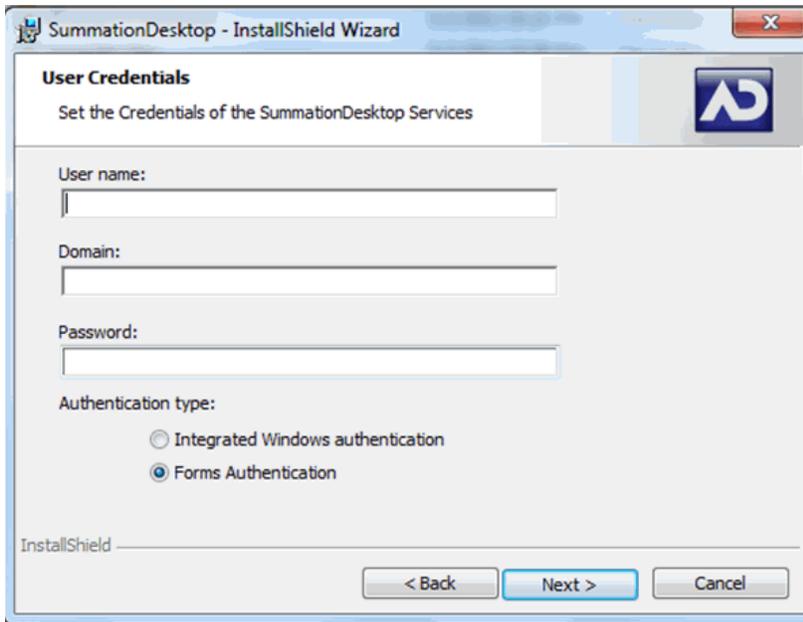
**To install the MS SQL Express database**
1. A dialog appears, asking to choose the destination folder. Leave the default location for the installation unchanged and click **Next**.
2. Leave the default location for the installation unchanged and click **Next.**
3. If there is not at least 100GB of free space on the Operating System drive, a dialog will appear.
   a. If a different location is desired for the temporary processing folder, change the path on the 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

4. Enter user name, domain and password information for the service account.

5. See The Summation Service Account .

6. **User Name**: The Summation Service account name - what was used to login to Windows to install Summation Express.

7. **Domain**: If the service account was created on the local workstation, then leave the domain blank.

8. **Authentication type:** Select **Forms**.



9. Click **Next**.

# Installing SQL Server 2008 R2 Express Edition

If the workstation does not have an instance of SQL Server 2008 running on it, the next dialog will initiate an installation of Microsoft SQL Server 2008 R2 Express Edition.

**Note:**   If the Summation Express workstation already has an instance of SQL Server 2008 running on it and that installation is available for the Summation Express application, please skip to the section titled SQL Server 2008 Configuration for an Existing SQL Server Instance.

1. In the *SQL Server Administrator Setup* dialog box, you must create a SQL Server password for a default SQL administrator account named "sa".

**Note:** Although a user account could be any name fitting Windows' naming convention, for the purpose of this document, it will be referred to as "sa." This account may also be referred to as the 'sysadmin' or SQL admin. 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.

Microsoft SQL Server passwords must meet the following password guidelines[1]:

- 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:
    - Latin uppercase letters (A through Z)
    - Latin lowercase letters (a through z)
    - Base 10 digits (0 through 9)
    - Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%)

**Note:** WRITE DOWN THIS PASSWORD. It will be needed later in the installation process.

2. Click **Next** to proceed with installing SQL Server.

   A file extraction dialog, as well as SQL Server 2008 R2 dialogs will appear, this is typical and does not require user interaction. This may take a few minutes.

3. In the *Database Server* dialog, remove the (local) entry in the **Database server that you are installing to** field. In this field, enter **[Computer Name]\SQLExpress**. For example, if the workstation's name is Summcomputer, enter **Summcomputer\SQLExpress** to create the SQL server instance name. Keep the *Use Integrated Security* option checked.

   To determine the workstation's name, click **Start**, right-click on **Computer**, and select **Properties. The** workstation's name will be listed by Computer Name.

4. 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 SQL Server 2008 R2 Express Edition Installation.
   Installing SQL Server 2008 R2 Express Edition

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[1]Source: **http://msdn.microsoft.com/en-us/library/ms161959(v=sql.105).aspx** . Last accessed on September 17, 2012.
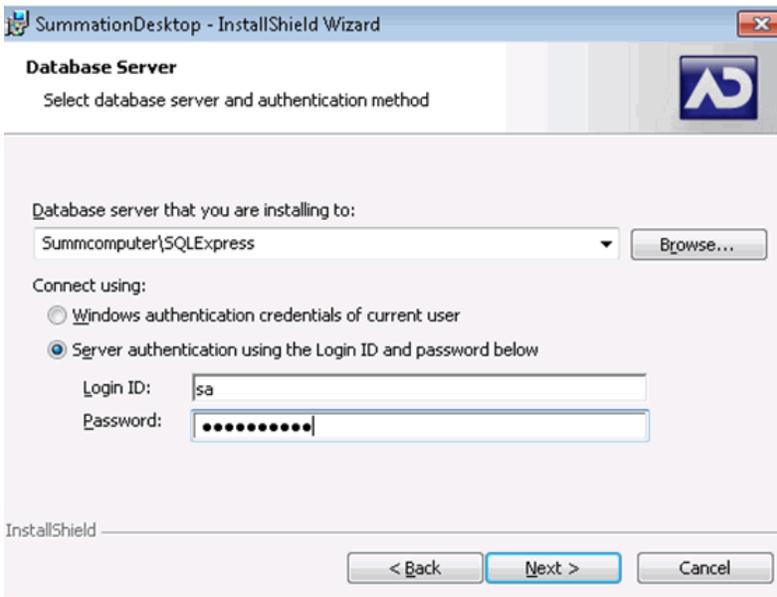
5. After filling in the SQL credentials that Summation Desktop will use, click **Next**, then **Install**.

## Installing the Summation Express Main Program

Once **Install** has been clicked, the Install Wizard will install the Summation Express main program. A number of pop-up dialog boxes will appear during the installation, but none require any interaction.

The following will be installed during this time:

- AccessData CopyCase
- AccessData Evidence Processing Engine
- AccessData WCF Services
- AccessData Work Manager
- AccessData MAP
- AccessData Processing Services
- Database Configuration Tool
- Migration Utility

## Installing the ADG Database for SQL

After installation is complete, a dialog box will appear to set up the Summation application database.

**Note:** A dialog box may appear at the top left of the screen stating **This product requires a reboot** before the Database Configuration tool appears. If this occurs, please do the following:

**To reboot before running the Database Configuration tool**

1. Click the OK button and allow the workstation to reboot.

2. Navigate to the following location:  `C:\Program Files (x86)\AccessData\DBConfigTool\` .

3. Run the `DBConfig.exe` file as Administrator.

Log back in to Windows with the account credentials created in The Summation Service Account section. See [The Summation Service Account](#) .

**To set up the Summation application database**

1. The *AccessData Database Configuration Tool* main window appears.
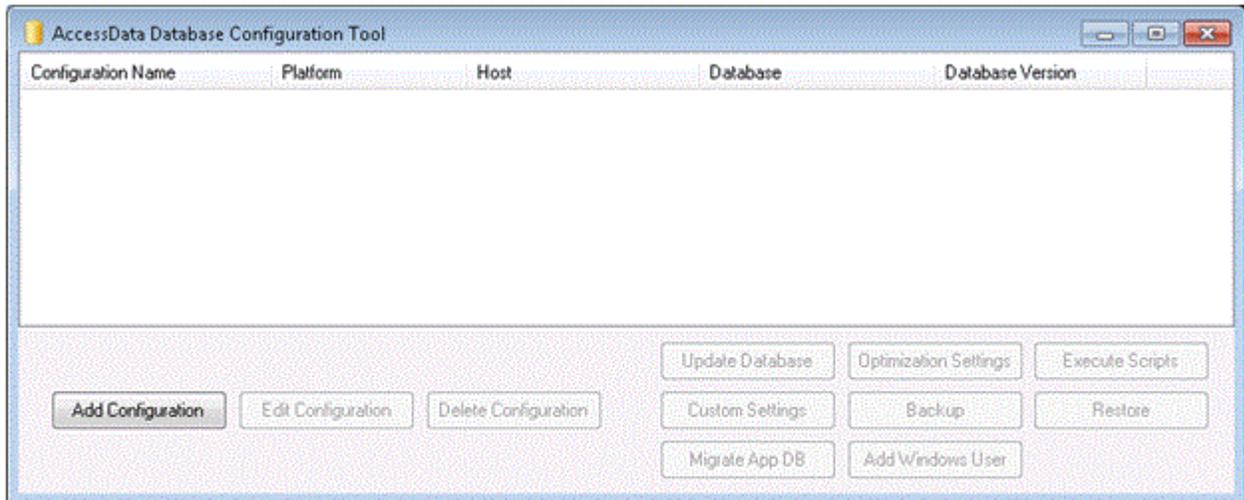


2. Click **Add Configuration** to bring up the *Database Information* window.

3. Enter the following in the fields shown in the above dialog box:

**Database Information Fields**

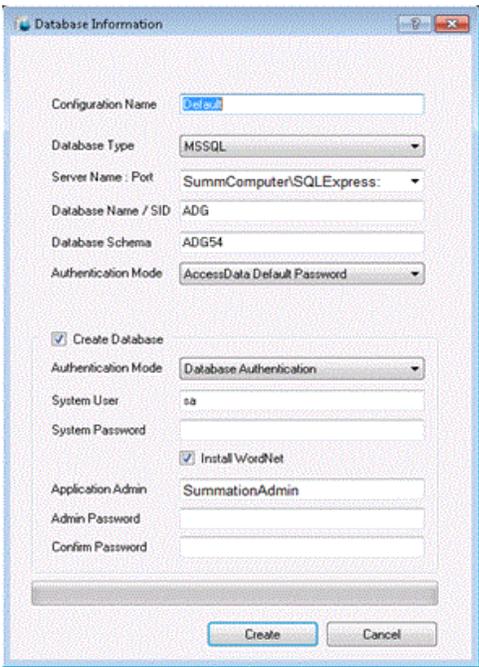| Field Name | Information |
|---|---|
| **Configuration Name** | Choose an appropriate name or just leave as **Default**. |
| **Database Type** | Leave as **MSSQL.** |
| **Server Name: Port** | The SQL server instance name. This should auto-populate with the name of the name of the workstation. |
| **Database Name/SID** | Leave as **ADG** - This is the name of the database that will hold the Summation case data. |
| **Database Schema** | Leave as **ADG54**. |
| **Authentication Mode** | Leave as **AccessData Default Password**. |
| **Create Database** | If Summation Express is installed as an upgrade, leave this option unchecked. If this is a new installation of Summation Express, check this option. |
| **Authentication Mode** | Leave as **Database Authentication**. |
| **System User** | **Leave as sa.** |

| | |
|---|---|
| **System Password** | The complex password defined for sa. If SQL Server was installed as part of this install, this would have been set in step 2 of the install. Installing SQL Server 2008 R2 Express Edition |
| **Install WordNet** | Select this box. |
| **Application Admin:** | Enter an appropriate user name here. This user name will become the first named user of the Summation Express application.<br><br>This user will have administrative privileges and will be used to log into Summation Express for the first time.   If "Integrated Windows authentication" was chosen in the "User Credentials" dialog in step 19 of the "Installation" section, then enter a username in the format:   "DomainName\username".   If "Forms Authentication" was chosen, then this format does not need to be used. See *User Credentials* dialog below. |
| | |
| **Application Password** | A password for this user. |
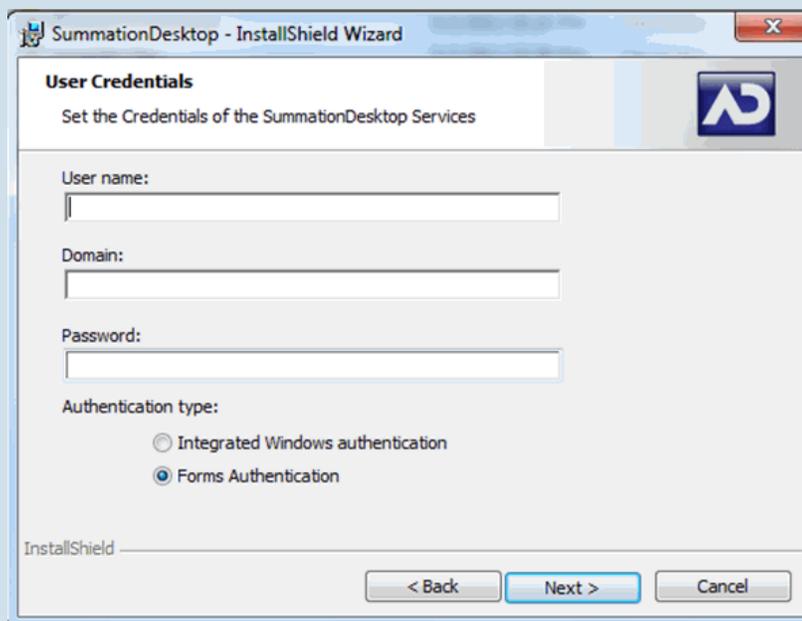
4. Click the **Connect** button and the ADG database will be created.
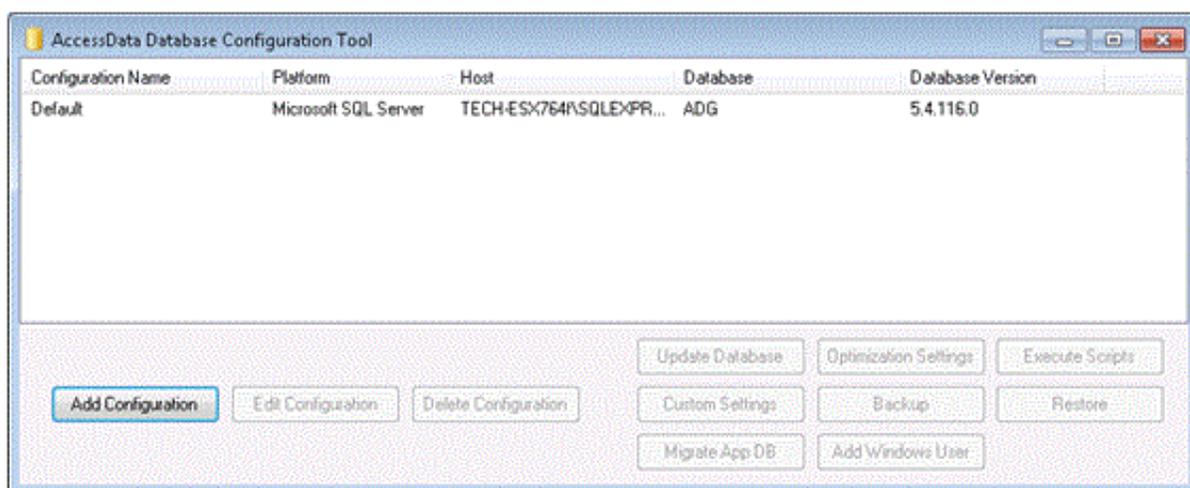


5. After this last part of the install completes, the workstation will be rebooted automatically.

6. After the reboot, a shortcut will appear on the desktop. Click this shortcut to launch the Summation application, and log in with the Application Admin account created above.

   Note: Please see the section titled *Required Add-Ons for Internet Explorer* for information about what add-ons are needed for Internet Explorer.

7. Be sure to install the self-signed SSL Certificate. See Configuring the Self-Signed SSL Certificate .

## SQL Server 2008 Configuration for an Existing SQL Server Instance

If the Summation Express machine already has an instance of SQL Server which is to be used by Summation Express, then use the following procedure to configure the SQL Server 2008.

**Note:** If SQL Express 2008 was installed along with the rest of the Summation Express program this series of steps is not to be performed. Please skip to Chapter 9, *Required Add-Ons for Internet Explorer.*

**To configure a SQL server 2008 for an existing SQL server instance**

1. Enter the password of the Summation Service Account and click **Next**. See Chapter 4*, The Summation Service Account*.

2. If the Summation Service Account was not used to install SQL, please login to the Summation Express machine's SQL instance as a SQL sysadmin ("sa" account)   and add the Summation Service Account as a SQL sysadmin. See Adding the Summation Service Account as a SQL Admin .

3. Enter the following information in the *Database Server* dialog:

   ● In the **Database server that you are installing to** field, remove the (local) entry and submit the proper instance name (If a default instance, this will be the machine name).

   ● Mark the **Server authentication using the Login ID and password below** radio button.

   ● Enter the SQL sysadmin account ("sa") name and password.

   ● After filling in the SQL credentials that Summation Desktop will use, click **Next**, then **Install.**
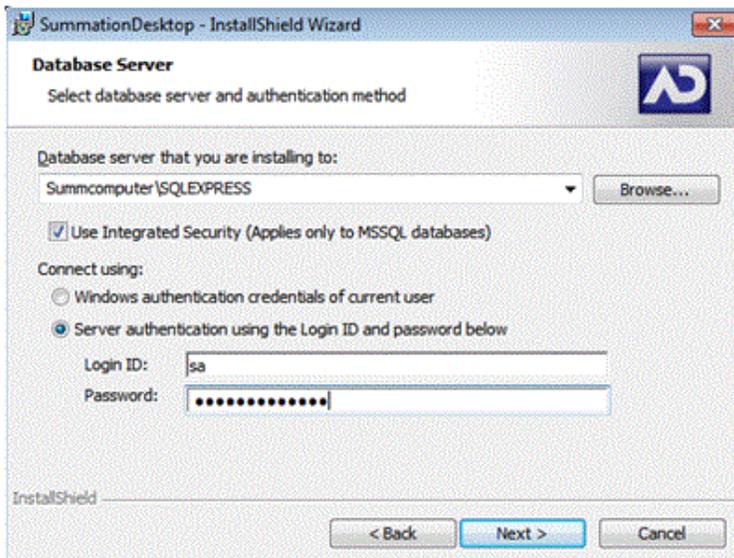
Continue with the main install. See Installing the Summation Express Main Program .

## Adding the Summation Service Account as a SQL Admin

If the Summation Service Account was not used to install SQL, you will need to login to the Summation Express machine's SQL instance as a SQL sysadmin ("sa" account) and add the Summation Service Account as a SQL sysadmin.

**To add the Summation Service Account as a SQL sysadmin**

1.  Open *SQL Management Studio* as the SQL sysadmin.
2.  Navigate to the **Security** object, select **Logins** and right-click the **Summation Service account**. Select **Properties**.
3.  In the *Properties* pop-up window, select **Server Roles** and check the box titled **sysadmin**.
4.  Click **OK** and exit *Management Studio*.
5.  **Recommended:**   Restart the SQL Server Service by going to the *Start* menu of the Express machine, right-click **Control Panel** and select **Manage**. In the *Computer Management* pop-up window, go to **Services and Applications > Services**.   Select **SQL Server** and select **Restart the service**.

# Chapter 9
# Required Add-ons for Internet Explorer

To use all of the features of Summation Express, Internet Explorer requires the following add-ons:

- Native Viewer 8.4
- Oracle Outside X
- Microsoft Silverlight 4 or 5
- Adobe Flash Player*

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

*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.

## Installing the Browser Components

Upon first login, the Summation Express webpage will detect if the workstation's browser does not have Microsoft Silverlight, Native Viewer, AccessData's Bulk Print tool, and Adobe's Flash Player and will prompt the user to download those add-ons.

Each Summation Express user will need to install the browser components.

**To install Silverlight**

1. Click **Click Now to Install** in the Silverlight Window and then click **Run** in the accompanying security prompts.
2. Be sure to click the **Install Now** to formalize the install and keep the *Enable Microsoft Update* checkbox checked.
3. Click **Next** to continue and then exit the Silverlight installer. If the web browser does not show the AD logo, refresh the browser window.

The Summation Main Window will open.
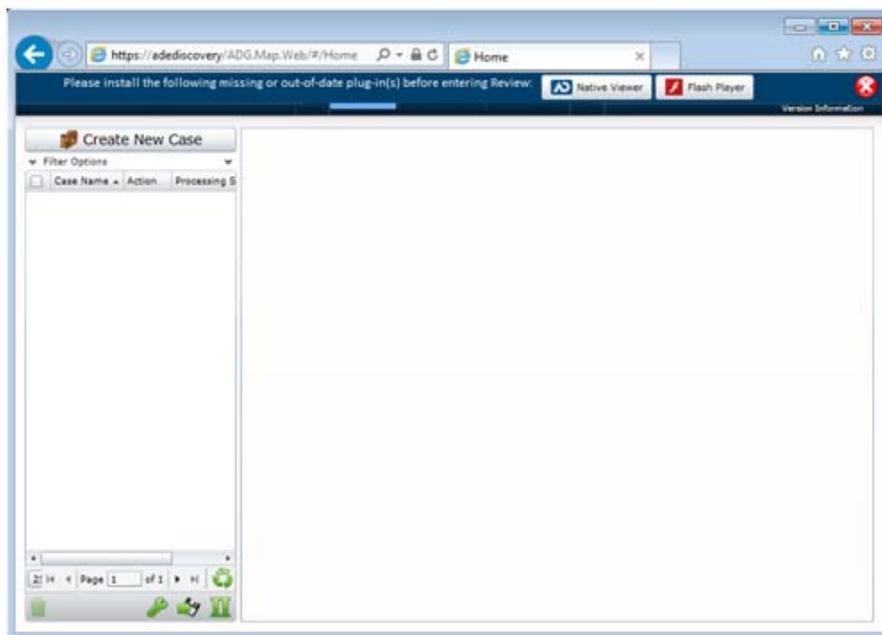


**To install the AD Native Viewer**

1. From the Summation main window, click the **AD Native Viewer** button.
2. Click **Run** at the NearNativeSetup.msi prompt in Internet Explorer.
3. Click **Next** on the *InstallShield Wizard* dialog.
4. Click **Next** on the *Custom Setup* dialog.
5. Click **Install** on the *Ready to Install the Program* dialog.
6. Allow the installation to proceed and then click **Finish**.
7. Ignore and click through the prompt to close all browsers.   Do not close any browser windows.
   The *Welcome to the OutsideX32 Setup Wizard* screen appears.



8. Click **Next**.
9. Check the box in the *End User License Agreement* dialog to accept the terms and click **Next**.
10. Choose the *Complete* button in the *Choose Setup Type* dialog and click **Next**.
11. Click **Install** and allow the process to finish.
12. Click **Finish**.

Please install the following missing or out-of-date plug-in(s) before entering Review: **AD Bulk Print Local**
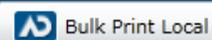
**To install the AD Bulk Print Local**

- Click the **Bulk Print Local** button.

- Click **Run** at the AccessData Bulk Print Local.exe prompt in Internet Explorer.

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

- Check the radio button in the *End User License Agreement* dialog to accept the terms and click **Next.**

- Accept the default location in the *Choose Destination Location* dialog.

- Click **Install** on the *Ready to Install the Program* dialog.

- Allow the installation to proceed and then click **Finish**.

- If necessary, log back in to install the Adobe Flash add-on.

**To install Flash**

1. From the Summation main window, click the **Flash Player** button.

2. A separate web browser window will appear to install Flash.

3. Click the download button.

4. Uncheck the option to install Google Chrome and Toolbar.

5. Complete the installation.

6. Allow Adobe to install any updates.

7. Click **FINISH**.
   A new separate Internet Explorer window will launch indicating the status of the installation, which should be successful.

Any separate Internet Explorer windows for the Adobe download and the window indicating the successful status can now be closed.

# Installing Browser Components Manually

## Installing Native Viewer 8.4

To install the Native Viewer 8.4 installer, navigate to the following path:

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

**To install the Native Viewer add-on**

1. Run the `NearNativeSetup.MSI` file.

2. Click **Next** on the *InstallShield Wizard* dialog.

3. Click **Next** on the *Custom Setup* dialog.
4. Click **Install** on the *Ready to Install the Program* dialog.
5. Allow the installation to proceed and then click **Finish**.

## Installing OutsideX

After the Native Viewer add-on is installed, the OutsideX add-on should be installed. To install the OutsideX add-on, navigate to the following path:

C:\Program Files (x86)\Near Native ActiveX Package\Bin\Outsidex32.msi.

**To install the OutsideX add-on**
1. Run the OutsideX32.msi file.
   The *OutsideX Setup Wizard* should appear.
2. Click **Next** to begin.
3. Click **Next** on the *Select Installation Folder* dialog. The default setting of **Everyone** is recommended.
4. Click **Next**. After the OutsideX installation is complete, click **Close**.

## Installing the Bulk Print Tool

After the Outside X add-on is installed, install the Bulk Print tool. Navigate to the following path:

C:\Program Files (x86) \AccessData\MAP\AccessData Bulk Print Local.exe

**To install the Bulk Print add-on**
1. Run the AccessData Bulk Print Local.exe.
   The wizard should appear.
2. Click **Next** to begin.
4. Click **Next** on the *Select Installation Folder* dialog.
4. Click **Next**. After the installation is complete, click **Close**.

## Installing Adobe Flash Player

Visit http://get.adobe.com/flashplayer/ and follow the prompts to install the flash player that is referred to in the beginning of the chapter.

# Chapter 10
# Configuring the Self-Signed SSL Certificate

AccessData considers the security of its clients' data to be of the utmost importance.   Beginning with Summation version 5.0, a valid SSL certificate is required to use the product.

While the certificate is installed by default with Express, the website name is initially bound to the default of https://adediscovery/ADG.Map.Web. If the Summation Express URL needs to be changed, then the SSL certificate also needs to be changed to allow clients to be able to access and use Express without issue.

**To configure the SSL certificate**

1.  Access http://www.microsoft.com/en-in/download/confirmation.aspx?id=17275 on the Summation Express machine.

2.  Download the **IIS6 Resource Kit Tools** (iis60rkt.exe).

3.  After the iis60rkt.exe file has downloaded, go to **Start > Programs > IIS Resources > Self SSL > SelfSSL** to open the **Self-SSL tool**.
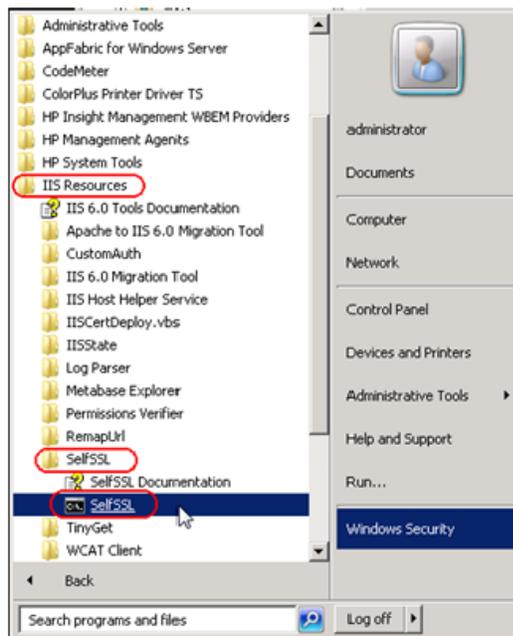


4.  Enter the following at the command prompt screen. Note that your Summation machine name needs to be substituted for the "Summcomputer" reference:

    Selfssl /n:cn=Summcomputer /v:365 /t

    ●   The "Selfssl" switches are as follows:

        ■    /N:cn = Specifies the common name of the certificate.   Remember that the Summation machine name should be specified for the **Summcomputer** reference.

- ■ /V = the number of days the certificate is to be valid.   In this example, the certificate will expire in 365 days.   The lifecycle of the Summation box should be taken into consideration when defining the certificate.   If the box is to serve Summation for 3 years, then enter 1095 for /V
        - ■ /t    Adds the self-signed certificate to "Trusted Certificates" list.   The local browser will then trust the self-signed certificate if this flag is specified.
    - ● When the *Do you want to replace the SSL settings for Site 1* is prompted, enter **y**.
    - ● Type **exit** to leave the command prompt screen.
5. Bind the Certificate to the website you've entered above in IIS by going to

    **Start > Control Panel > Administrative Tools > Internet Information Services (IIS) Manager > Left hand-pane machine name > Default Web Site > Bindings**.
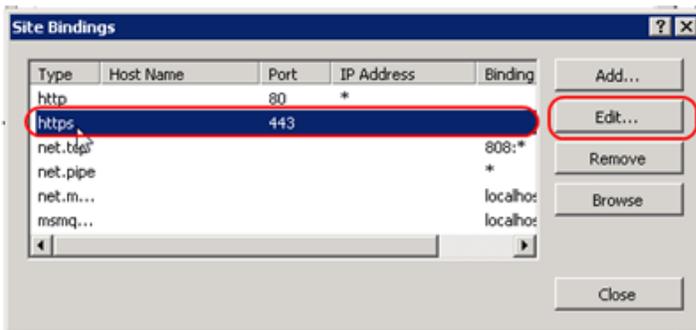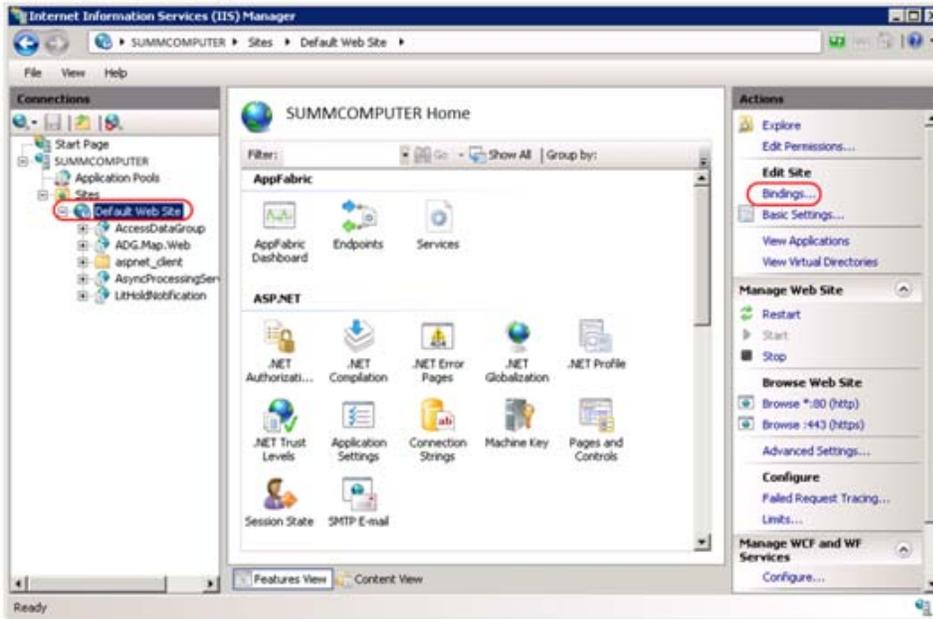




6. Scroll to the **Type** of **https** and click **Edit** in the Site Bindings Window.
7. Important:   The **SSL certificate** drop-down box should have an entry of the name that was entered in the **Selfssl** tool. In this example, "SUMMCOMPUTER" would be visible and would be selected for the certificate binding.
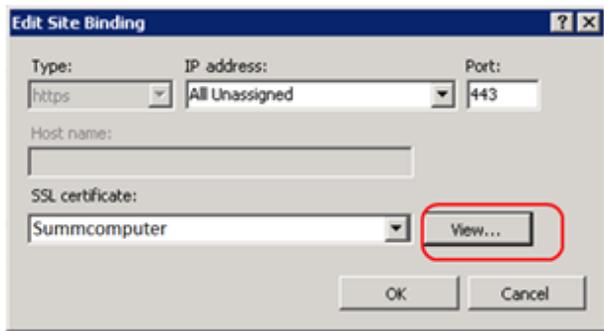
8. Click **View** in the *Edit Site Bindings* dialog if you want to check the **Valid from** date range of the certificate. In this example, 365 days was used, so the range will appear as from today to one year from today.

9. Open a command prompt (**Start >** type **'cmd'** in the search box) and enter **iisreset**.

10. Close all Internet Explorer browser windows.

11. Open Internet Explorer and go to **https://Summcomputer/adg.map.web**.
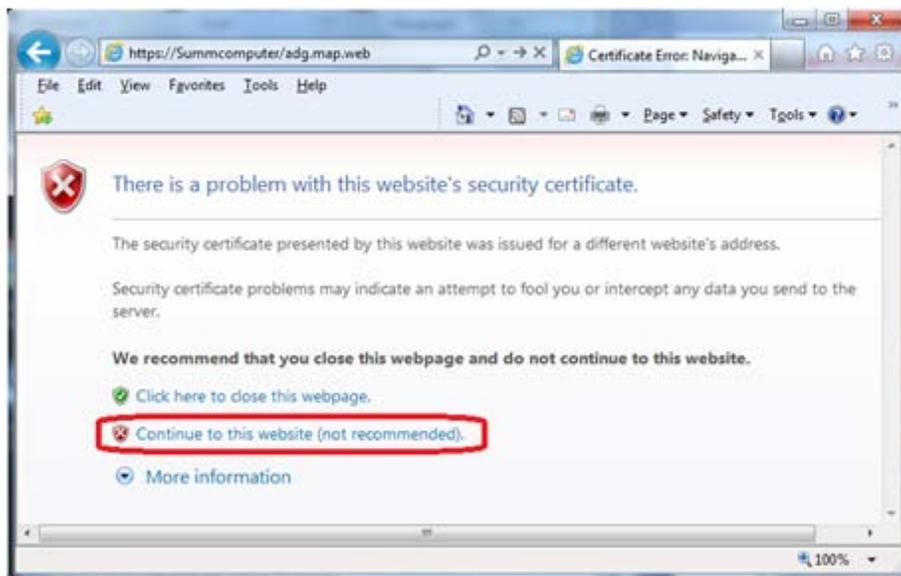


12. Continue to the website and click the **Certificate Error** location in the site's address bar.
    A *Mismatched Address* dialog will drop down from the address bar.

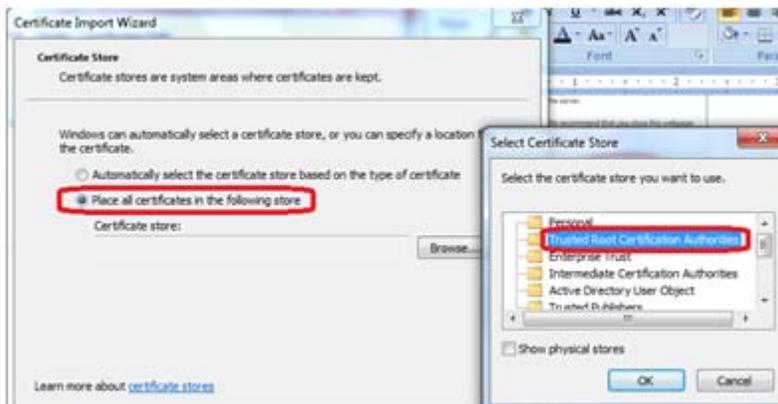13. Click the **View Certificates** option.

14. Click **Install Certificate** and click **Next**.



15. Choose the option **Place all certificates in the following store** and click **Browse**.
16. Choose **Trusted Root Certification Authorities** and click **OK**.



17. The Certificate store field will confirm the choice.   Click **Next**.
18. The *Completing the Certificate Import Wizard* dialog appears. Click **Finish**.
19. Depending on the machine's settings, a *Security Warning* dialog may appear.
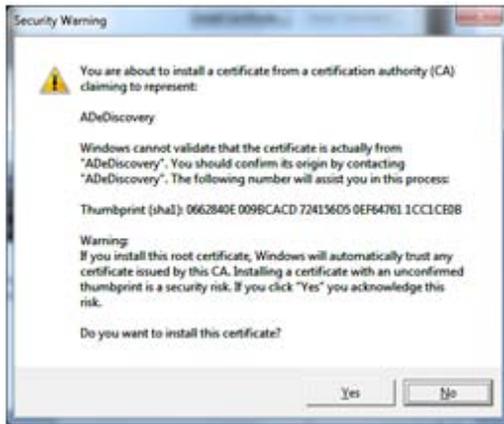
20. A *Certificate Import Wizard* window should appear when the import succeeds.

21. Click **OK**.

22. Close all browser windows and revisit the Summation site.   You should be able to access the site without error.

**Note:**   The certificate should be installed on all workstations that access the Summation site to avoid the certificate error and to ensure Summation works as intended. To do so, please repeat steps 11 through 22.

# Chapter 11
# Troubleshooting

## Troubleshooting Summation Express Install

This chapter details common problems and solutions to installing Summation Express.

## Frequently Asked Questions

1. Q: After the BlackIce (ColorPlus printer driver) installer has run, the installation process stopped. What should I do?

   **OR**

   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 right-click the Summation Express installer and rerun it as Administrator. 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 234).

   **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 attempting to reinstall Summation Express, please perform the Clean Uninstall steps listed in the *Uninstall Summation* section below.

## Uninstalling Summation

To uninstall Summation Express, please follow the steps below.

**To uninstall Summation Express**

1. Uninstall the Summation Desktop component:
   - SummationDesktop 5.0.0.27

Next, uninstall any of the following components that remain:

- AccessData Database Configuration Tool 5.0.0.27
- AccessData eDiscovery Database Setup 5.0.0.29
- AccessData Evidence Processing Engine 10.5 10.5.0.109
- AccessData MAP 5.0.0.24
- AccessData Processing Services (64 bit) 5.0.0.27
- AccessData Summation-Migration Utility 5.0.0.26
- AccessData WCF Services 5.0.0.33
- AccessData Work Manager 5.0.0.33
- CopyCase 5.0.0.27

2. Uninstall SQL server 2008 Express (listed as **MS SQL Server 2008 R2 (64-bit)**) and delete the SQL server folders found in the Summation Express Workstation's **C:\Program Files** and **C:\Program Files (x86)**.

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

- ADG (contains Summation Express cases)
- eDiscovery
- Infrastructure
- Workflow40
- Workflow
- Additional databases that were created in the Database Configuration tool for use by Summation Express (e.g. Case_ADG54_0001, etc.)

4. Optional: The following prerequisite add-ons may also be uninstalled from the Summation Express workstation:

**Note:** If planning to reinstall Summation Express, then these applications can remain on the workstation and the Summation Express installer can be run again. The installer will detect which of these applications exist and continue installing the remaining components.

- ColorPlus Driver (BlackIce) VB (no version)
- MS .NET Framework 4 Client Profile 4.0.30319
- MS .NET Framework 4 Extended 4.0.31319
- MS CCR and DSS Runtime 2008   R3 2.2.760
- MS Visual C++ 2005 Redistributable (x64) - installed with ColorPlus Printer Driver
- MS Visual C++ 2008 Redistributable x64 9.0.30729.6161
- MS Visual C++ 2008 Redistributable x86 9.0.30729
- MS Visual C++ 2010 Redistributable x64 10.0.30319
- MS Visual C++ 2010 Redistributable x86 10.0.30319

Optional: The AD licensing tools may also be uninstalled. However if you have already activated a virtual license on the Summation Express workstation, it is recommended that these programs remain:

- AD License Manager 3.1.5
- Codemeter runtime kit v4.50b/4.2

# PostgreSQL Configuration and Administration

Please visit http://www.postgresql.org for more information about how to administer PostgreSQL.

# How to contact Summation Technical Support

- Support Hours: Mon-Fri, 6:00 AM– 6:00 PM (PST), except corporate holidays.
- 800.786.2778 (North America).
- 415.659.0105
- Email: support@summation.com
- Please see the AccessData website for further information
  http://accessdata.com/support/technical-customer-support/