

Summation Mobile Guide



AccessData Legal and Contact Information

Document date: February 20, 2014

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Chapter 1

Using Summation Mobile

Summation Mobile is an application that you can use to work on your Summation projects off of the network. Summation Mobile uses the Copy Case utility to make a copy of a Summation project from the network application to your laptop that you can review off of the network. You can do your work on the copied project in Summation Mobile and then you can merge your changes back into the network project. Summation Mobile is an add on product. Contact your sales representative for information on how to get Summation Mobile.

Prerequisites

To use Summation Mobile, you need the following things:

- Summation Mobile installed on your laptop (automatically installs the Copy Case utility)
- Rights to the project you are copying
- Connection to the network during copying

Summation Mobile Limitations

The following are limitations for Summation Mobile:

- Maximum of 2 million records
- Maximum of 3 users
- Processing CPUs cannot exceed 4

Tasks You Cannot Perform

You cannot perform the following tasks in a copied project :

- Create/Delete Project
- Manage Users
- Manage Groups
- Manage Roles
- Manage Permissions
- Manage Custom Columns (including adding Categories)
- Manage Tagging Layouts
- Manage Persistent Highlighting Profiles

- Manage Markup Sets
- Manage Redaction Reasons
- Manage AutoText Options

Note: Auto Text (also known as Auto Complete) is a macro placed in a document that completes to show a full formed text option.

- Manage Permissions for: Labels, Issue Values, Saved Searches, and Category Values
- Create/Rename/Delete Production Sets
- Rename Saved Searches
- Delete Evidences
- Create images for the records with electronic documents

Deletions in Summation Mobile

Deleting the following items in a copied project will NOT delete them from the network project after the merge:

- Labels
- Notes
- Transcript Groups / Transcripts
- Exhibits
- Saved Searches
- Document Records

Copying a Case

Using the Copy Case utility, you can copy a case from the network application to your laptop for off network use. The laptop where you copy your case may also be referred to as the “local machine.” You must fulfill the prerequisites in order to copy a case.

See [Prerequisites](#) on page 9.

To copy a case

1. Open the Copy Case utility on your laptop.

Copy Case Utility

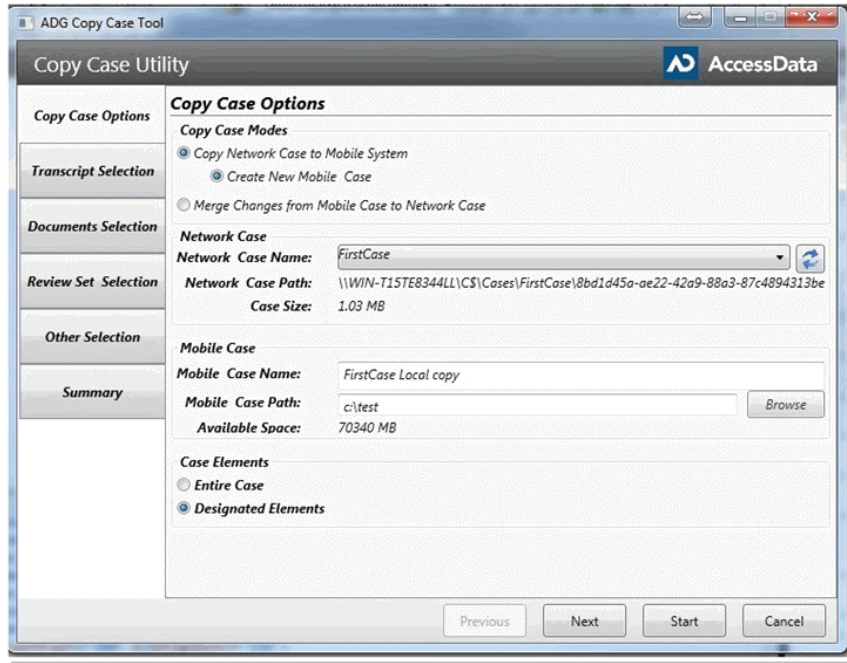
The screenshot shows the 'ADG Copy Case Tool' window. The title bar reads 'ADG Copy Case Tool'. The main window title is 'Copy Case Setup' with the AccessData logo. The window is divided into four sections:

- Provide Network Login information:** Network URL: http://10.10.122.56/ADG.Map.Web/, User Name: administrator, Password: [empty].
- Provide Mobile Login information:** User Name: administrator, Password: [empty].
- Provide Path to the Shared Directory between Network and Mobile:** Shared Directory: \\WIN-T15TE8344LL\testpath, with a 'Browse' button.
- User Settings:** Copy Data accessible for me, Copy Data accessible for user [dropdown].

Buttons for 'OK' and 'Cancel' are located at the bottom right.

2. In the *Provided Network Login Information* group box, enter the following:
 - **Network URL:** Enter the URL for the network Summation application.
 - **User Name:** Enter a user with rights to the network.
 - **Password:** Enter the password for the user you entered.
3. In the *Provide Mobile Login Information* group box, enter the following:
 - **User Name:** Enter a user that has access to the case you want to copy.
 - **Password:** Enter the password for the user you entered.
4. Browse to a *Shared Directory*. This directory needs to be a location where both the network and local machine has Read/Write access (used to store data temporarily during the copy process).
5. Click **OK**.

Copy Case Options Screen



6. In the *Copy Case Modes* group box, select **Copy Network Case to Mobile System**.
7. In the *Network Case* group box, expand the case drop-down and select the case that you want to copy. Only cases that you have access to will appear. The *Network Case Path* and *Case Size* are automatically populated when you select a case.

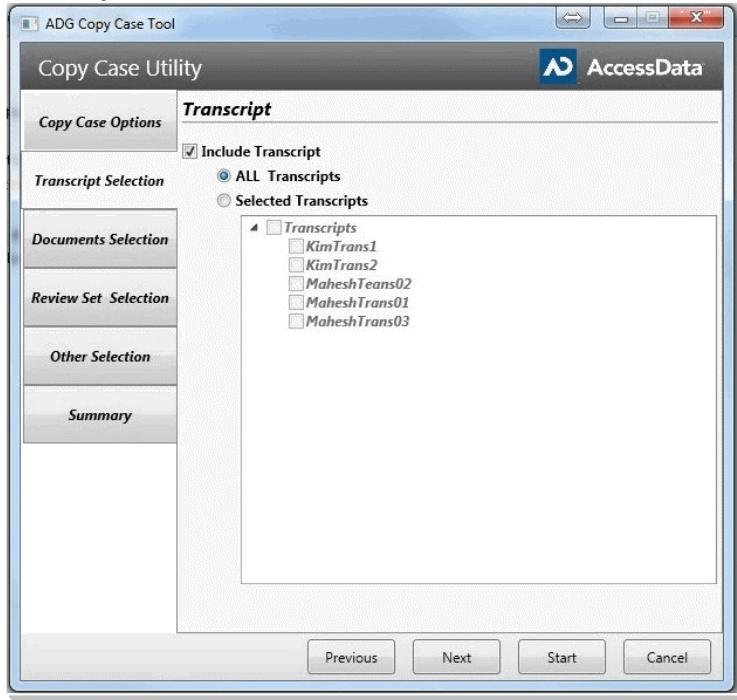
Note: With SQL Express on the local machine, you are limited in the size of the case that you can copy.

8. In the *Mobile Case* group box, do the following:
 - 8a. Enter a new name for the case by which it will be saved on the local machine.
 - 8b. Browse to a location on the local machine where you want to save the case.
9. In the *Case Elements* group box, select one of the following:
 - **Entire Case:** Select this to copy the entire case to the local machine.
 - **Designated Elements:** Select this to choose what elements you want to copy. You can specify to copy the following: Transcript Groups, Review Sets, Production Sets, Saved Searches, and Labeled Documents.

Note: What you select in the *Case Elements* group box will determine the next screen you see.

10. Click **Next**.
11. If you selected to copy the *Entire Case*, skip to the Summary step.
12. If you selected to copy *Designated Elements*, you will see the *Transcript Selection* screen.

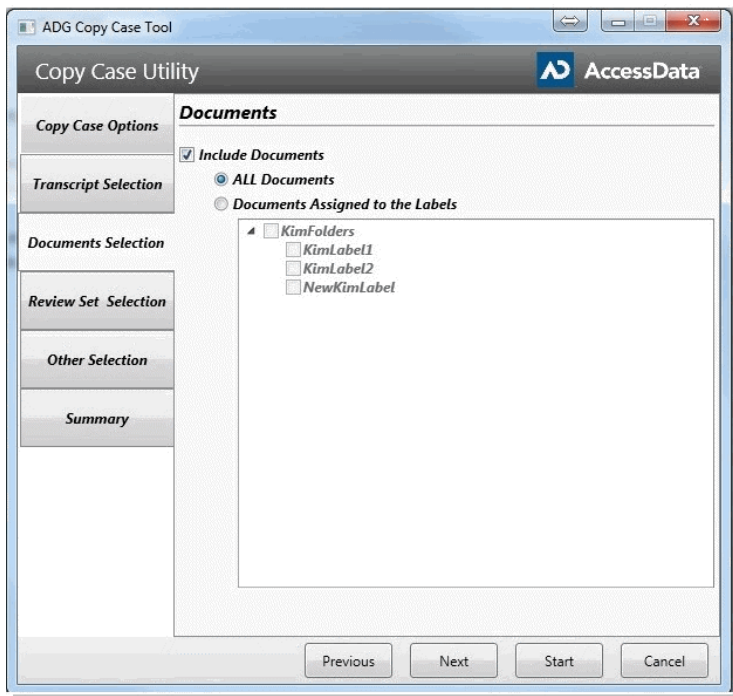
Transcript Selection Screen



13. In the *Transcript Selection* screen, make selections among the following and click **Next**:

- **Include Transcript:** Check this to include transcripts in the copy.
 - **All Transcripts:** Select this to include all the transcripts in the case, in the copy.
 - **Selected Transcripts:** Select this to include only the transcript groups that you check in the copy.

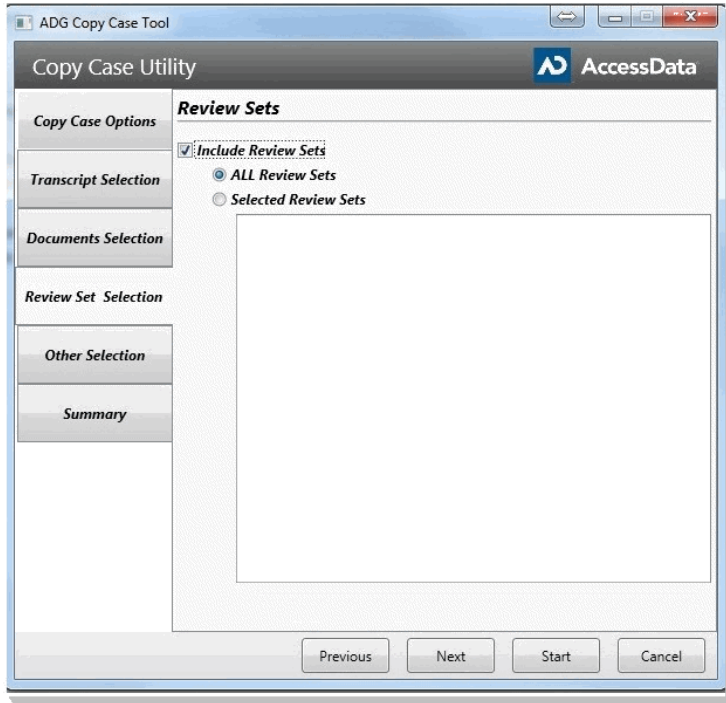
Documents Selection Screen



14. In the *Documents Selection* screen, make selections among the following and click **Next**:

- **Include Documents:** Check this to include documents in the copy.
 - **All Documents:** Select this to include all the documents in the case, in the copy.
 - **Documents Assigned to the Labels:** Select this to include only the documents assigned to labels that you check in the copy.

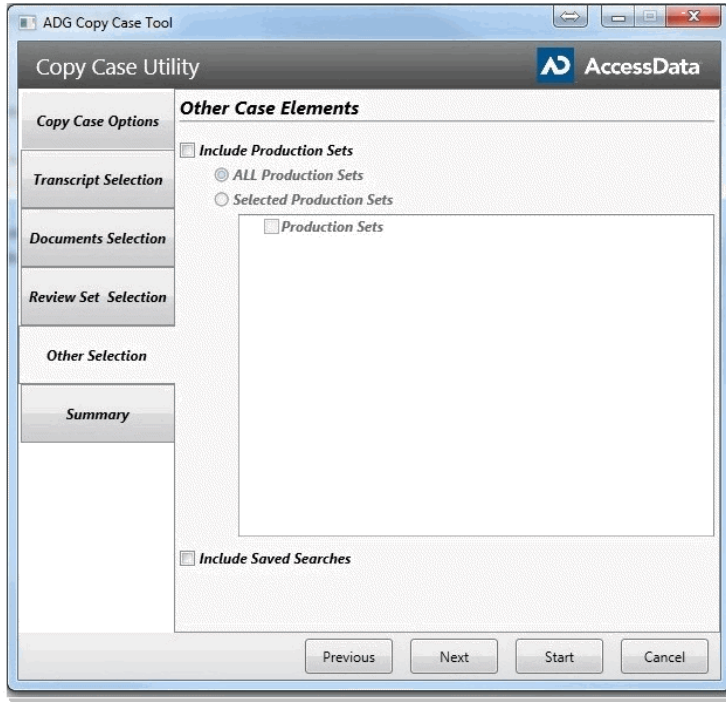
Review Set Selection Screen



15. In the *Review Sets* screen, make selections among the following and click **Next**:

- **Include Review Sets:** Check this to include review sets in the copy.
 - **All Review Sets:** Select this to include all the review sets in the case, in the copy.
 - **Selected Review Sets:** Select this to include only the review sets that you check in the copy.

Other Selection

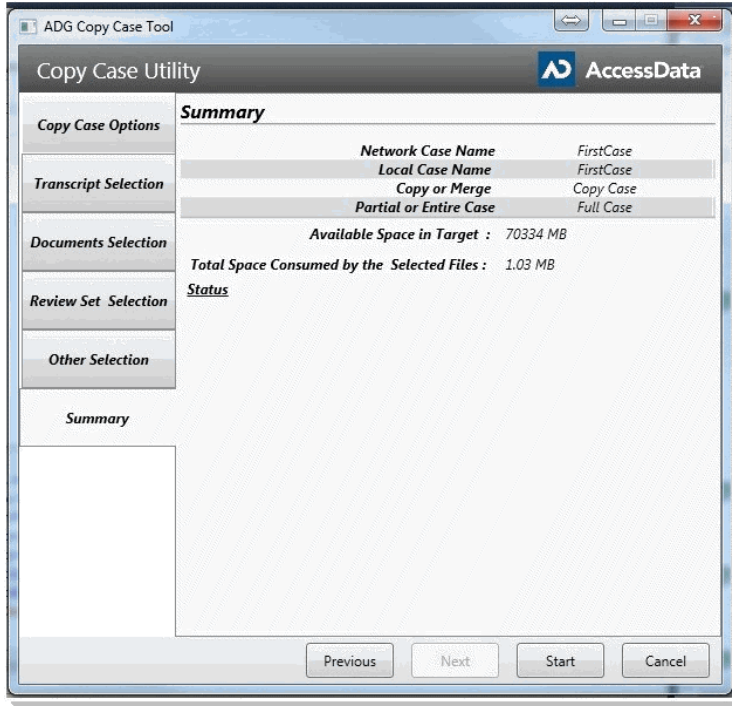


16. In the Other Selection screen, make selections among the following and click **Next**:

- **Include Production Sets:** Check this to include production sets in the copy.
 - **All Production Sets:** Select this to include all the production sets in the case, in the copy.
 - **Selected Production Sets:** Select this to include only the production sets that you check in the copy.
- **Include Saved Searches:** Check to include saved searches in the copy.

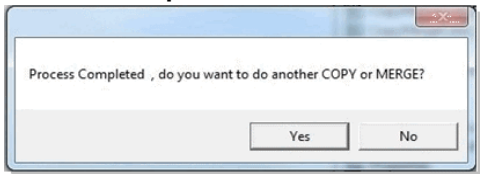
Note: Production sets cannot be changed. If you copy them to your local machine, you will not be able to make any changes to existing production sets and you will not be able to merge them back in to the network case. You can copy them for viewing purposes only.

Summary Screen



17. In the *Summary* screen, review the selections you have made and click **Start**.

Process Complete



18. Click **Yes** to perform another copy or **No** if you are done.

19. Click **Close**.

Opening the Copy of Your Project Using Summation Mobile

Once you have copied a project to your laptop, you can access the project copy using Summation Mobile that is installed on your laptop. The laptop where you copy your project may also be referred to as the “local machine.”

See [Copying a Case](#) on page 11.

See [Summation Mobile Limitations](#) (page 9) for the limitations of Summation Mobile.

To open your copied project

1. Do one of the following:
 - Double-click the Summation Mobile icon on your desktop.
 - Open a browser and enter localhost or the IP address of your machine.
2. Log in to Summation.
3. Review your project as usual.

Merging a Copied Project

After you have made your changes to the copied project , you can merge the project back into the network application.

Note: You can merge a copied project only ONCE. Once you have merged a copied project , you cannot merge that copy again. You will need to make another copy of the network project to merge the project again.

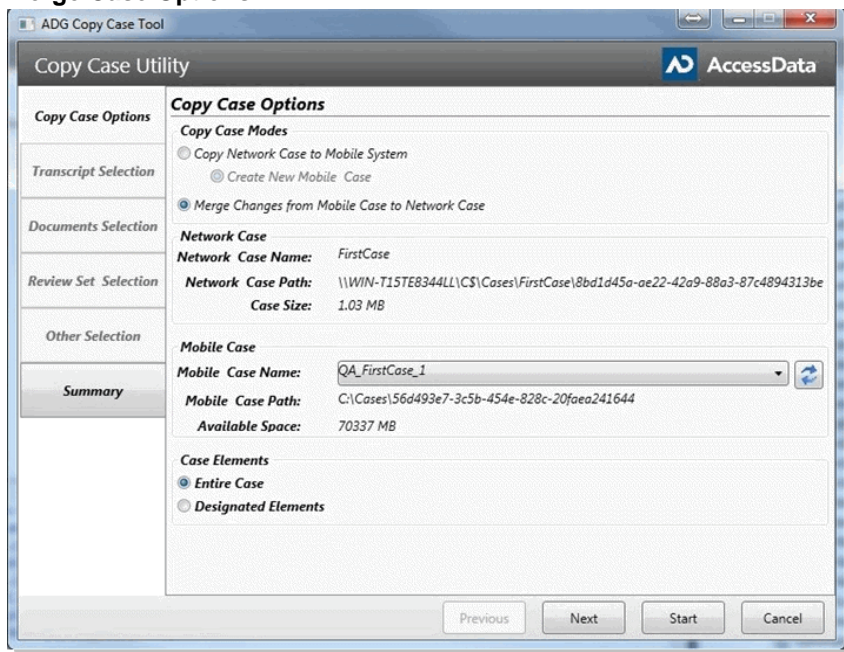
If conflicts appear in a merge, you will be presented with the choice to keep the network version or the copied project version of the conflict. Choosing the copied version will overwrite the network version.

The laptop where you copy your project may also be referred to as the “local machine.”

To merge a copied project back in to the network application

1. Ensure your laptop is connected to the network.
2. Open the Copy Case utility on your laptop.
3. In the *Provided Network Login Information* group box, enter the following:
 - **Network URL:** Enter the URL for the network Summation application.
 - **User Name:** Enter a user with rights to the network.
 - **Password:** Enter the password for the user you entered.
4. In the *Provide Mobile Login Information* group box, enter the following:
 - **User Name:** Enter a user that has access to the project you want to merge.
 - **Password:** Enter the password for the user you entered.
5. Browse to a *Shared Directory*. This directory needs to be a location where both the network and local machine has Read/Write access (used to store data temporarily during the merge process).
6. Click **OK**.

Merge Case Options



7. In the *Copy Case Modes* group box, select **Merge Changes from Mobile Case to Network Case**.
8. In the *Mobile Case* group box, select a copied project from the local machine.
The respective *Network project Name* and *Network project Path* will be populated automatically.
9. In the *Project Elements* group box, select one of the following:
 - **Entire Case**: Select this to merge the entire project copy to the network application.
 - **Designated Elements**: Select this to choose what elements you want to merge. You can specify to merge the following: Transcripts, Documents, Review Sets, Saved Searches, and Labeled Documents.

Note: Ensure that you check all the items that you want to merge because you will not be able to merge anything again after the merge is complete. You can only merge a project once.

Note: What you select in the *Case Elements* group box will determine the next screen you see.

10. Click **Next**.
11. If you selected to copy the *Entire Case*, skip to the Summary step.
12. If you selected to copy *Designated Elements*, you will see the *Transcript Selection* screen.
13. In the *Transcript Selection* screen, make selections among the following and click **Next**:
 - **Include Transcript**: Check this to include transcripts in the merge.
 - **All Transcripts**: Select this to include all the transcripts in the project, in the merge.
 - **Selected Transcripts**: Select this to include only the transcript groups that you check in the merge.
14. In the *Documents Selection* screen, make selections among the following and click **Next**:
 - **Include Documents**: Check this to include documents in the merge.
 - **All Documents**: Select this to include all the documents in the project, in the merge.
 - **Documents Assigned to the Labels**: Select this to include only the documents assigned to labels that you check in the merge.
15. In the *Review Sets* screen, make selections among the following and click **Next**:
 - **Include Review Sets**: Check this to include review sets in the merge.
 - **All Review Sets**: Select this to include all the review sets in the project, in the merge.
 - **Selected Review Sets**: Select this to include only the review sets that you check in the merge.

Note: Production sets cannot be changed. You will not be able to merge production sets back in to the network project. You can copy them for viewing purposes only.

16. In the *Summary* screen, review the selections you have made and click **Start**.
17. Click **Yes** to perform another copy or **No** if you are done.
18. Click **Close**.