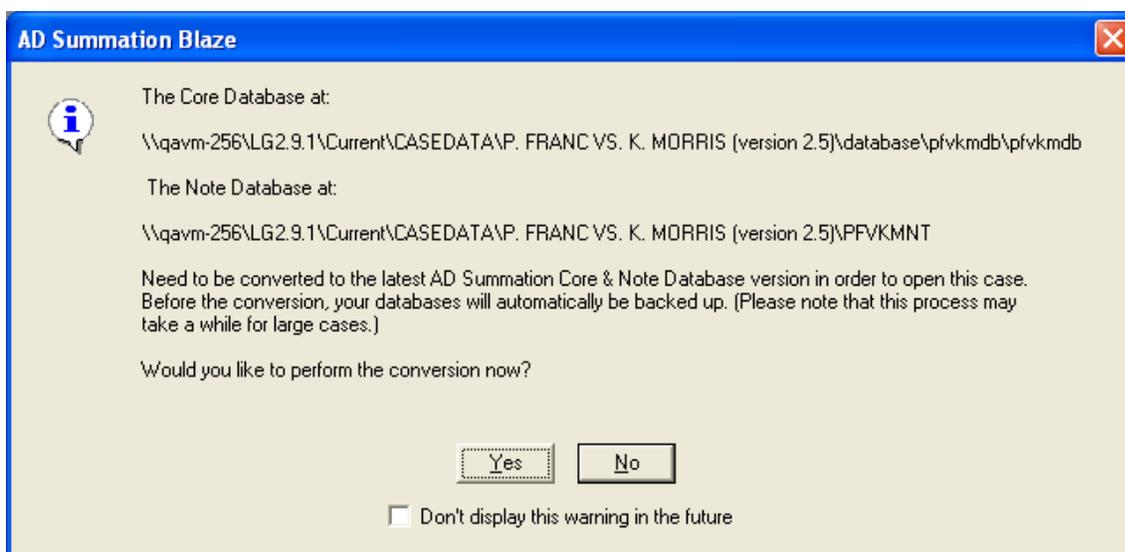


Case Conversion Version 3.1 Frequently Asked Questions

The version 3.1 release of AD Summation iBlaze includes the **#Rdctd** database column, providing support for searchable redactions functionality. In addition, the version 2.9.1 release of AD Summation iBlaze included changes to both the underlying Transcript Annotations database schema and Tagging and Foldering schema, supporting version 2.9.1 Transcript Highlighting and Tagging and Foldering features. As a result, when you open a case in version 3.1 that was created in an earlier version of the software, you may receive the following Conversion message.



Case Conversion Message

Do I have to convert my cases?

No. Case Conversion is an **optional** process.

What are the benefits of Case Conversion?

Case Conversion allows you to take advantage of the iBlaze 2.9.1 Transcript Highlighting and Tagging and Foldering features, as well as version 3.1 support for searchable redactions.

How does Case Conversion affect my cases?

For each case created in version 2.9 or earlier, the conversion process adds four new columns to the Core Database table, whether custom or default, and three new tables to the Note Database. The tables of the Note Database are used by the system solely for the Transcript Highlight Topics and Issues feature.

Do I have to convert my cases again if I already converted them when I upgraded to version 2.9.0?

To use the latest features, yes.

How do I convert a case?

If you have the appropriate permissions, there are three methods to convert cases.

- Convert a single case when opening it by clicking **Yes** on the Conversion Message.

- Convert a single case by selecting **Convert Current Case** from the **Case** menu.
- Convert multiple cases by selecting **Convert Multiple Cases** on the **Utilities** window.

Are there any Case Conversion securable functions?

Yes. Permissions can be assigned to the following Case Conversion securable functions via the Administrator Console:

- **Convert Case**- Allows you to convert a single case to the latest database schema. This permission is located under the **Case** permissions in the Administrator Console.
- **Can Convert Multiple Cases**- Allows you to convert multiple cases at a time to the latest database schema. This permission is located under the **Administration** permissions in the Administrator Console. Users can access the **Convert Multiple Cases** option in the **Utilities** window. This function should only be performed by administrators and very advanced AD Summation users.

When will I see the Conversion message?

Unless a AD Summation administrator has turned off the Conversion message, all users will see this message when they login to version 3.1 and open an un-converted case. Since Case Conversion is an optional process that should only be performed by advanced users, you may wish to turn off this message.

How do I turn off the Conversion message?

Use the following instructions to turn off the Conversion message, so that users are not given the option to convert an un-converted case as soon as they open it. This is a global change and will affect all users.

1. Open AD Summation with the **Case Explorer** in focus. Select **Administrator Console** from the **File** menu.
The **Administrator Console** launches.
2. Login to the **Administrator Console**.
3. On the **Group Admin** tab, click **System Options** and select **Conversion Message** from the sub-menu.
The **Conversion Message Setup** dialog is displayed.
4. Select **Turn Off** to suppress the Conversion message for all users.

*What happens if the Conversion message is not turned off and I click **Yes** on this message?*

If you have permission to convert the case, the case will be converted. If you do not have permission to convert the case, you will receive the following message: **Your security settings do not allow you to convert the case.**

*What happens if the Conversion message is not turned off and I click **No** on the message?*

The case will not be converted and will open in the pre-2.9.1 database schema and retain the Transcript Highlighting and Tagging and Foldering functionality that existed previously for that case.

*What happens when I select the **Don't display this warning in the future** check box on the Conversion message?*

You will no longer see the Conversion message when you open un-converted cases. However, if you have the appropriate permissions, you can still convert the case by selecting either **Convert Current Case** from the **Case** menu or the **Convert Multiple Cases** button on the **Utilities** window.

*Is the **Don't display this warning in the future** option a user setting, a case setting or a global setting?*

This option is a user setting. If the Conversion message has not been globally turned off by an administrator, other users will still see this message.

Is there any maintenance I should run on my case prior to the conversion?

No. The **Core Database** and the **Note Database** are automatically backed up, checked for errors, and packed before the actual conversion.

What happens if I am converting a case and another user tries to open the case?

The second user will be unable to open the case and will receive a **Database is in use** error message.

What if other users are in the case when I try to convert it?

You will receive an error message informing you that you will not be able to perform the case conversion until all users exit the case.

Can I share a converted case with a user who is on a version prior to 3.0?

Yes. The case can be shared, but the user will not be able to take advantage of the latest features.

*What happens if I have customized the standard database template (**STDDB**) in the application directory?*

The database template is backed up to a folder called **STDDB** located in the application directory, and the original is overwritten with a clean, standard database template using the new database schema. If the standard database template has been modified in previous versions of AD Summation, you can retain these changes. Please contact AD Summation Product Support for assistance.

Can I convert multiple cases at a time?

Yes. If you have the appropriate permissions, you can convert multiple cases at a time by selecting **Convert Multiple Cases** on the **Utilities** window. This function should only be performed by administrators and very advanced AD Summation users.

Can I delay Case Conversion to a more convenient time?

Yes, you can delay the conversion of multiple cases for up to 24 hours. For more information, see the *Converting Cases Overview* help topic in the Online Help.

Is there any maintenance I should run on my case after the conversion?

No. The **Core Database** and the **Note Database** are automatically backed up, checked for errors, and packed after the conversion.

Is there a Conversion Log?

Yes. When either a single case or multiple cases are converted, a Conversion log file is created with the following naming convention: **[user id].[date and time stamp].log**. This file can be found in the **Conversion Logs** folder in the AD Summation application directory. For example, the path to this file might read: *F:\Summation\Blaze\Logs\Conversion Logs\jsmith.2009.06.05.12.53.16.log*.

How long does it take to convert a single case?

The length of a single case conversion varies based on the size of your case. During the Case Conversion process, the case is checked, packed, and Blazed both before and after the conversion. As a result, you can estimate that the conversion will take roughly the amount of time it takes to check, pack, and Blaze your case twice.

How will this conversion affect my data?

The conversion will not affect your data and as a safeguard will create a backup of the **Core Database** and the **Note Database**.