

AD Summation



Installation and Upgrade
Guide



iBlaze

Version 3.1
Published: September 2010

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Introduction

AD Summation iBlaze helps you efficiently manage case information such as transcripts and documents with the benefits of full-text imaging, PDF support, electronic evidence support and comprehensive production tools. This guide describes how to install and upgrade stand-alone and shared versions of AD Summation iBlaze products.

AUDIENCE

This document is intended for administrators who are preparing to install AD Summation iBlaze. For information about using the iBlaze application, refer to the *iBlaze 3.1 Online Help* after the installation is complete.

STYLES USED IN THIS DOCUMENT

This document provides a number of visual cues to help guide you. The following styles are used in this document:

Italicized text – Italicized text indicates a new term or a term that is specific to AD Summation or its products. The first time that a new term is used, it is italicized and accompanied by a definition.

Italicized text also indicates the title of another document or section within this document. If you are viewing an electronic version of this document, blue italicized text indicates a cross-reference that you can click to move directly to that section of the document.

Bold text – Bold text indicates an item that is found on the AD Summation iBlaze product interface, such as a menu option, a window, a field, or a dialog box.

Underlined Text: Underlined text indicates a link to a cross-referenced document containing further information on a subject.

NOTE: Notes call attention to supplemental yet important information about the topics covered in this document. Notes also provide suggestions on how to deal more effectively with AD Summation iBlaze administration, or warnings that you should heed.

RECOMMENDED SYSTEM SPECIFICATIONS

There are some recommended system specifications for the AD Summation iBlaze server, network clients, and mobile clients.

SERVER RECOMMENDED REQUIREMENTS

Processor	Memory	Disk Type	Operating System	Network
2 GHz	4 GB RAM	250 MB + case data (RAID 5 or SCSI Ultra 320)	Windows 2003 Server with SP2 With Network Interface Card	100 Mbps or Greater
2 GHz and Dual Core	4 GB RAM	250 MB + case data (RAID 5 or SCSI Ultra 320)	Windows 2008 Server R2	100 Mbps or Greater

NETWORK CLIENT RECOMMENDED REQUIREMENTS

Processor	Memory	Disk Type	Operating System	Network
2 GHz	4 GB RAM	250 MB + case data (RAID 5 or SCSI Ultra 320)	Windows 2003 Server with SP2 With Network Interface Card	100 Mbps or Greater
2 GHz and Dual Core	4 GB RAM	250 MB + case data (RAID 5 or SCSI Ultra 320)	Windows 2008 Server R2	100 Mbps or Greater

MOBILE RECOMMENDED REQUIREMENTS

Processor	Memory	Disk Type	Operating System	Software Required	Network
1 GHz	1 GB RAM	250 MB + case data (IDE ATA100 or SCSI Ultra 320)	Windows XP Professional Windows Vista Business Windows 7 (32 Bit) Professional	IE 7 or Later MS Office 2003 or Later	100 Mbps or Greater
2 GHz	2 GB RAM	250 MB + case data (IDE ATA100 or SCSI Ultra 320)	Windows 7 (64 Bit) Professional	IE 7 or Later MS Office 2003 or Later	100 Mbps or Greater

PRE-INSTALLATION CHECKLIST

- Ensure that the computer meets the recommended hardware and software requirements (see the *Recommended System Specifications* section of this guide for details).
- Have the installation CD and serial number (for new installations) handy. The serial number is a 14 digit numeric and alpha character value in the following format: ##A-###AA-#####A (where # represents a number and A represents an alpha character), and is located on the package containing the CD.

NOTE: If you cannot locate your serial number, please contact your sales representative.

- Determine what type of system you are installing (for example, Mobile or Concurrent-user and new or update). This can be found on the serial number sticker.
- Determine the appropriate deployment method. If you have an existing application deployment infrastructure in place and a large number of mobile systems or network-clients to deploy, you may want to consider using the silent method of deployment. If you are unsure of which method to use, we recommend the standard interactive method of deployment.
- If performing an update, ensure that a full backup of all case data has been performed prior to beginning the update process. AD Summation is NOT responsible for lost or corrupted data.

INTERACTIVE OR SILENT INSTALLATIONS: WHICH IS RIGHT FOR YOUR ENVIRONMENT?

A number of desktop management programs currently on the market are designed to facilitate the deployment and management of desktop applications. Some examples of such desktop management programs are: Microsoft Systems Management Server (SMS), Microsoft Active Directory (AD), Novell ZENworks, and Kixtart. Windows Installer, the key technology involved in the automated/silent deployment of applications to the desktop, is used in conjunction with your choice of desktop management program. Windows Installer in turn relies on MSI files to perform the installation.

AD Summation supports the Windows Installer standards (MSI files) in order to facilitate the automation of the installation process for the mobile edition and network-client programs. If an application deployment infrastructure is not already in place in your environment, or if only a small number of installations need to be performed, the standard interactive installation method is the most appropriate deployment method for your environment.

Mobile Edition Installations and Updates

INTERACTIVE MOBILE EDITION INSTALLATION

1. Log on to the computer that will serve as a mobile system. You must log on to Windows 2003/XP/Vista/Windows 7 computers as a user with administrative privileges.
2. Place the installation CD in the CD-ROM drive of the computer. The installation process should start automatically. If the installation Wizard does not auto-run, open Windows Explorer, navigate to the CD-ROM drive, and double-click **Launcher.exe**.
3. When prompted, select **Install a new system** and then click **Next** (*Figure 1*).

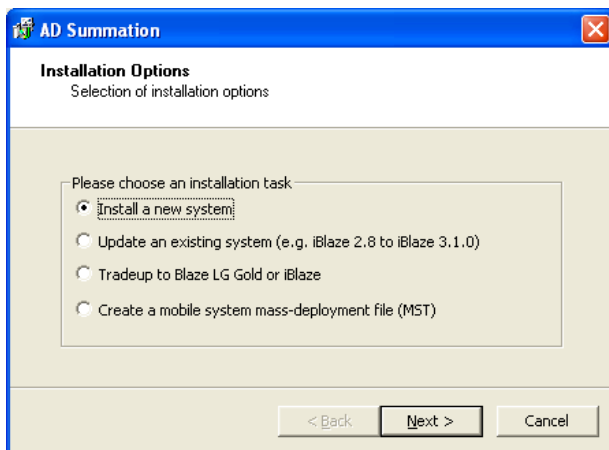


Figure 1

4. Enter the serial number from the sticker found on the CD-ROM package, then click **Next** (*Figure 2*).

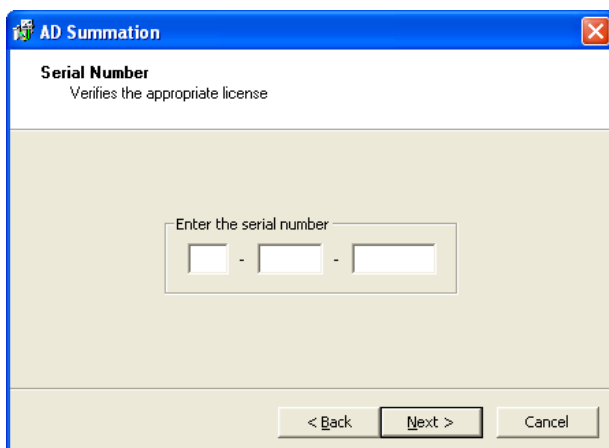


Figure 2

5. Select **I accept the terms of the license agreement** on the **License Agreement** dialog.

6. Specify the path to the location where you want to install the AD Summation program files. AD Summation recommends using the default location (typically C:\Program Files\Summation\Blaze) whenever possible (*Figure 3*).
7. Select at least one demonstration case to install by marking the appropriate box(es) (*Figure 3*).

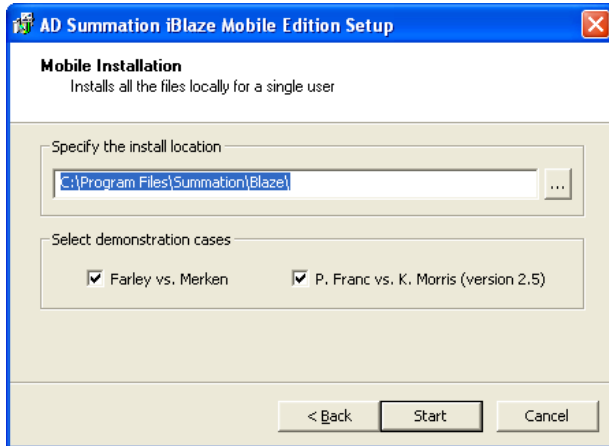


Figure 3

8. Click **Start**.
A dialog appears signaling the end of the installation process.
9. Click **OK**.

INTERACTIVE MOBILE EDITION UPDATE

NOTE: The AD Summation installation program is designed to automatically un-install existing installations of the CT Summation iBlaze product family prior to installing version 3.1. However, if you have multiple product installations, such as a mobile edition AND a network-client installed on the same computer, you must manually un-install (using **Control Panel – Add or Remove Programs**) prior to performing the update installation process. AD Summation does not support the installation of multiple versions/editions on a single computer.

1. Log on to the computer that will serve as the mobile system. You must log onto Windows XP/Vista/Windows 7 computers as a user with administrative privileges.
2. Place the installation CD-ROM in the CD-ROM drive of the computer, and the installation process should start automatically. If the installation Wizard does not auto-run, open Windows Explorer, navigate to the CD-ROM drive, and double-click **Launcher.exe**.

NOTE: During the un-installation process, case data will be retained, however it is recommended that you create a backup.

3. When prompted choose **Update an existing system**, and click **Next** (*Figure 4*).

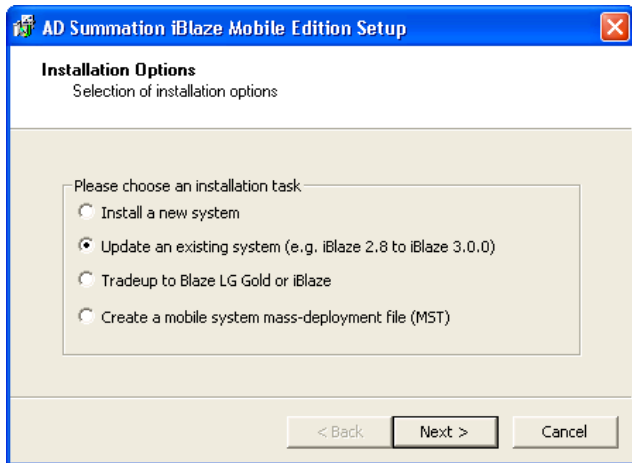


Figure 4

4. A dialog box appears asking if you want to update the existing system. Click **Yes**. Skip to step 11.
5. If your previous installation was a Legacy installation, you will see the **License Agreement** dialog. Select **I accept the terms of the license agreement**.

NOTE: A Legacy installation is an installation that was originally run from the **setup.exe** file found in the **Legacy Setup** folder, rather than from the **Launcher.exe** file.

6. The existing installation path will auto-populate into the installation path dialog box (for example *C:\Blaze*). Using the default location will ensure compatibility with existing data. Select at least one demonstration case to install by marking the appropriate check-box(es) (Figure 5).

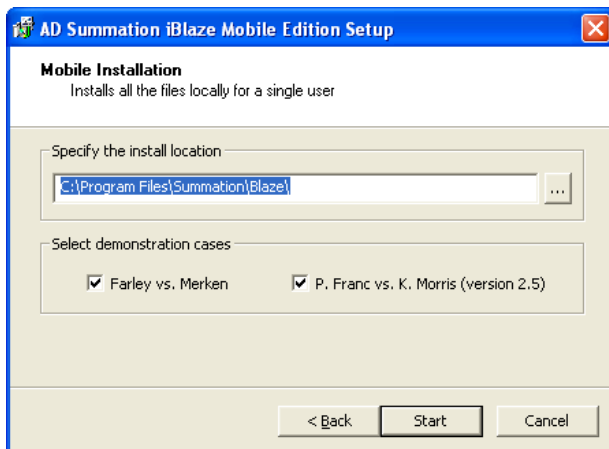


Figure 5

7. Select at least one demonstration case to install by marking the appropriate checkboxes.
8. Click **Start**.
A dialog appears confirming that you want to update the Legacy installation.
9. Click **Yes**.
The un-installer for the previous version of CT Summation appears.

10. Select **Remove**, and click **Next**.

The un-installation of the previous version completes. Then, the installation process will continue. Skip to step 12.

11. Depending on the version that is being upgraded, a dialog similar to (*Figure 5*) may appear. Click **Start** to begin the upgrade process.

NOTE: The update process backs ups and moves the standard database template (made up of **Stddb.se1**, **Stddb.se2**, **Stddb.se3**, and **Stddb.frm**) to the **STDDB** folder in the Summation application directory. If these database files have been modified in previous versions of Summation, you can retain these changes. Please contact AD Summation Product Support for assistance. If the standard database template has not been modified in previous versions, you will not be affected.

Concurrent-User Edition Installations and Updates

OVERVIEW

Two computers are necessary to install an iBlaze concurrent-user system. The *Server* is the computer that will host the program files for those connecting via the network. The *Workstation* is the computer that will be used to install the program to the server network share. Once the server installation is complete, the network-client software must be installed on all computers that will access the concurrent-user edition product being hosted on the server.

NOTE: The network-client is subject to the licensing terms of the server installation. Since the concurrent-user system licensing is based on the number of concurrent users on the server, the client can be installed on any number of desktop computers. However, the number of users allowed access to the system at one given time is limited to the number of network user licenses purchased.

SERVER INSTALLATION

1. If a network share does not exist, then create one on the server machine. For simplicity, the examples in this section refer to a server named **Sumserver** with a file-share named **Summation**.
2. Place the installation CD-ROM in the CD-ROM drive of the workstation. The installation process should start automatically. If the installation Wizard does not auto-run, open Windows Explorer, navigate to the CD-ROM drive, and double-click **Launcher.exe**.
3. When prompted, select **Install a New System**, and click **Next** (*Figure 7*).

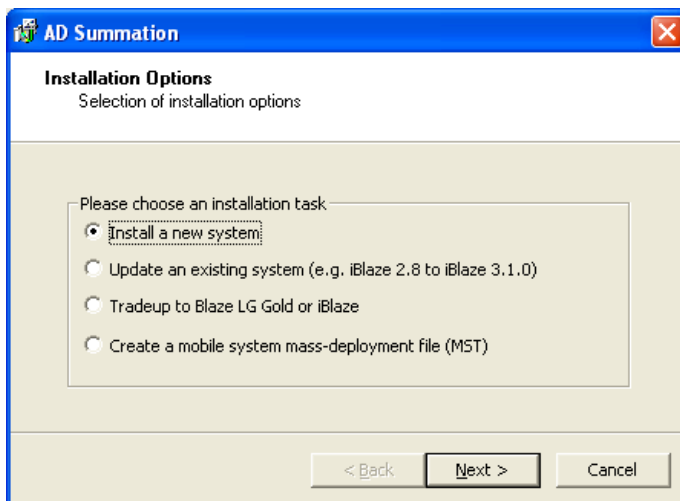


Figure 7

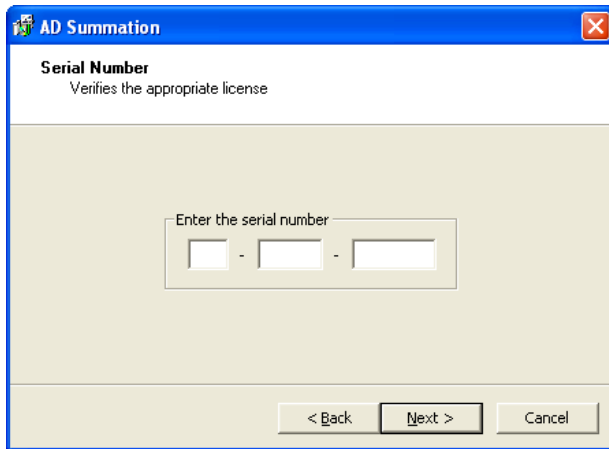


Figure 8

4. Enter the serial number from the sticker found on the CD-ROM package, then click **Next** (Figure 8).
5. Select **I accept the terms of the license agreement** on the **License Agreement** dialog.
6. Click the ellipsis button to browse to the network location that will host the server files (Figure 9). Enter the path to the shared network directory on the server (for example, \\Sumserver\Summation\iBlaze) (Figure 10). Click **OK**, and click **Start** to launch the installation process.

NOTE: iBlaze should NOT be installed directly to the root of the share.

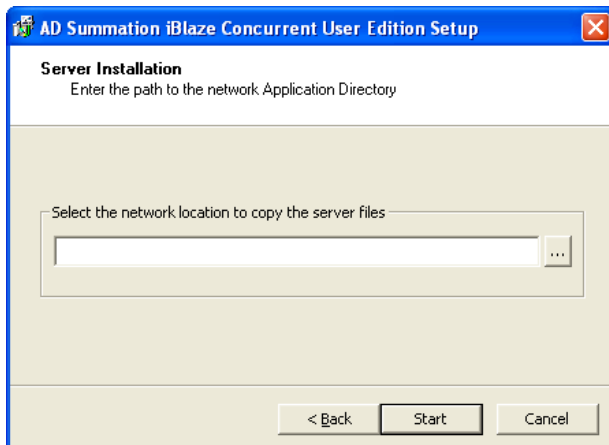


Figure 9

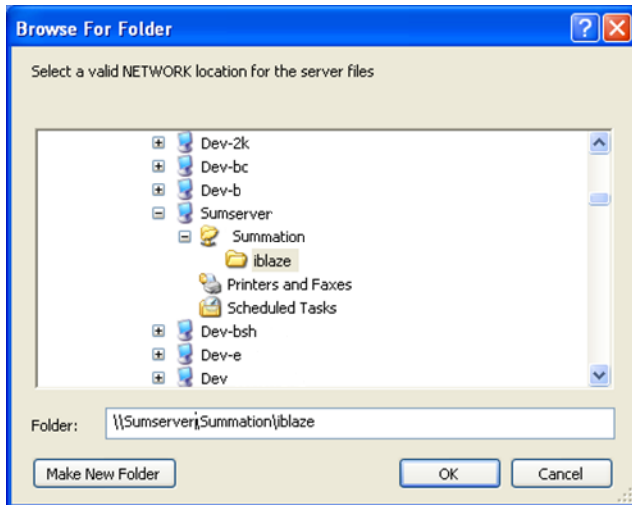


Figure 10

7. When finished, a final dialog appears, signaling the completion of the server installation process. Click **OK**.
8. Proceed to the network-client installation. Choose either the interactive method below or silent method detailed in the *Silent Network-Client Installation* section of this guide.

INTERACTIVE NETWORK-CLIENT INSTALLATION

1. Log on to the computer that will serve as a network-client. You must log onto Windows XP/Vista/Windows 7 computers as a user with administrative privileges.
2. Browse to the network location containing the server installation (for example, \\Sumserver\Summation\iBlaze), open the **Client Setup** subdirectory, and double-click the **NetworkClientInstallation** shortcut.

NOTE: The **Summation Blaze MU1.MSI** file must run directly from the root of the Summation application network directory. Typically, the file should be launched using the **NetworkClientInstallation** shortcut in the **Client Setup** subdirectory.

3. An introduction screen appears. Click **Next**.
4. Read and accept the licensing terms of the client software, then click **Next**.
The **Ready to install** dialog appears.
5. Click **Install**.
6. At the **Installation Wizard Completed** dialog, click **Finish**.
Depending on the components used during the installation process, you may be prompted to reboot. Click **Yes** to reboot.

UPDATE CONCURRENT-USER SERVER INSTALLATION AND UPDATE NETWORK-CLIENT INSTALLATIONS

To update an existing CT Summation installation, the installation type of the existing server-based system must be determined.

- If the existing server system is a 2.5x (or later) system and **Summation Blaze MU1.msi** (or **Summation Blaze.msi**) exists in the network application directory, use the instructions in the *Server Update for 2.5x (or later) Server Systems* section.

- If the existing server system is a pre-2.5x (not including 5.x) system or a 2.5x (or later) system that that does not contain a **Summation Blaze MU1.msi** (or **Summation Blaze.msi**) in the network application directory AND the workstation that was originally used to install the system is available, use the instructions in the *Server Update for pre-2.5x and Legacy-Installation Server Systems* section.
- If the existing server system is a pre-2.5x (not including 5.x) system or a 2.5x (or later) system that that does not contain a **Summation Blaze MU1.msi** (or **Summation Blaze.msi**) in the network application directory AND the workstation that was originally used to install the system is NOT available, use the instructions in the *Server Installation* section of this guide. This process will require that you know your server system installation code.
- Server update for 2.5x (or later) Server Systems
 1. Place the CD into the CD-ROM drive of the workstation and the update process should launch automatically. If the installation wizard does not auto-run, open Windows explorer, and double click on **Launcher.exe** in the CD-ROM drive.
 2. When prompted, select **Update an Existing System**, and click **Next**.
A dialog appears stating “No mobile system was found. Do you want to update an existing network system?”
 3. Click **Yes**.
The **Upgrading a Network System** dialog appears.
 4. Browse to the network application directory, then click **Apply** (Figure 12).
A dialog appears stating “After the server has been updated, you must update each client installation in order to use the updated system.”
 5. Click **OK**.
 6. The system is updated to version 3.1 and a dialog appears indicating the update was successful.
 7. Follow the instructions described in either the *Interactive Network-Client Update* or the *Silent Network-Client Update* sections of this guide. The network-clients must be updated prior to next use.

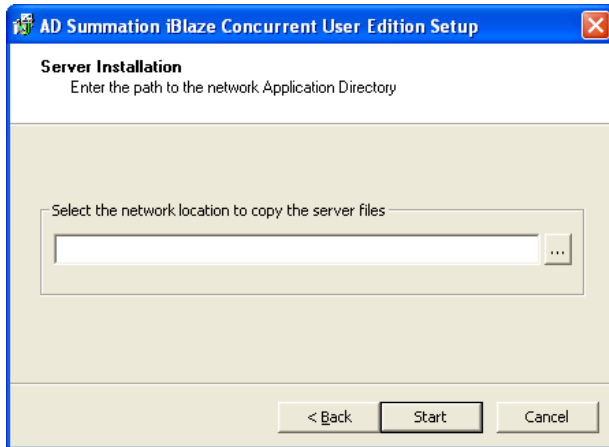


Figure 12

NOTE: The update process backs up and moves the standard database template (made up of **Stddb.se1**, **Stddb.se2**, **Stddb.se3**, and **Stddb.frm**) to the **STDDDB** folder in the Summation application directory. If these database files have been modified in previous versions of Summation, you can retain these changes. Please contact AD Summation Product Support for assistance. If the standard database template has not been modified in previous versions, you will not be affected.

SERVER UPDATE FOR PRE-2.5X AND LEGACY-INSTALLATION SERVER SYSTEMS

1. If possible, run the concurrent-user edition server installation update from the same workstation that was used to run the original installation. If the original workstation is used, the installation process will automatically detect all pre-existing path and licensing information. However, if the original workstation is NOT available, use the server installation instructions in the *Server Installation* section of this guide to install over the existing server files.
2. Place the CD-ROM into the workstation and the installation process should launch automatically. If the installation wizard does not auto-run, open Windows explorer, and double click on **Launcher.exe** in the CD-ROM drive.
3. When prompted, select **Update an Existing System**, and click **Next**.
4. You will see the **License Agreement** dialog. Select **I accept the terms of the license agreement**.
5. The network path to the existing concurrent-user application directory will auto-populate in the dialog box. Click **Start** to begin the installation process.
6. A dialog will appear stating “A previous Legacy Version of the product was found. . . When prompted, please choose the “Remove” option. Do you want to continue?” Click **Yes**.
7. Select **Remove** on the next dialog and then click **Next**. Click **OK** to confirm the removal.
8. Click **Finish** on the dialog that confirms the un-installation. The installation will begin. When finished, a final dialog appears signaling the completion of the server installation process.
9. Click **OK**.
10. Follow the instructions described in either the *interactive network-client update* or the *silent network-client update* sections of this guide. The network-clients must be updated prior to next use.

INTERACTIVE NETWORK-CLIENT UPDATE

1. Log on to the computer that will serve as a network-client. You must log onto Windows XP/Vista/Windows 7 computers as a user with administrative privileges.
2. Browse to the network location containing the server installation (for example, \\Sumserver\Summation\iBlaze), open the **Client Setup** subdirectory, and double-click on the **NetworkClientInstallation** shortcut.
3. An introduction screen displays. Click **Next**.
4. At the **Installation Wizard Completed** dialog, click **Finish**. Depending on the components used during the installation process, you may be prompted to reboot. Click **Yes** to reboot, if prompted to do so.

Silent Installation and Update

(Advanced Deployment Environments Only)

OVERVIEW

If you have a relatively large number of AD Summation mobile edition products or network-clients to deploy, it may be desirable to deploy the applications silently through a desktop management or application deployment software package (for example Microsoft SMS or Microsoft Active Directory). AD Summation supports the large-scale deployment of the mobile edition products as well as the concurrent-user network-client components through these various deployment technologies that support the Windows Installer service (MSI, MST, and MSP files). Deployment of these AD Summation products silently using application deployment software requires more planning and expertise and is recommended for advanced administrators with an existing application deployment infrastructure. Silent updates can only be performed on 2.x systems. If you want to silently update a pre-2.x system, the pre-2.x system must be manually uninstalled. The silent installation procedures can then be followed.

NOTE: This method of deployment should only be used in compliance with your software license agreement. It is your responsibility to ensure that you are in compliance with the terms and conditions of the AD Summation End User License Agreement (EULA). Using a single mobile system installation code on more than one computer is a violation of the AD Summation EULA.

SILENT MOBILE INSTALLATION OR UPDATE

1. Place the CD into the CD-ROM drive on your computer.
2. Copy the contents of the entire CD-ROM, except the **Legacy Setup** folder and the **autorun.inf** file, to a network directory. You will use this directory as the network application distribution point. (For example, \\DistribServer\DistShare\SumDeploy).
3. Once the copy is complete, double-click on **Launcher.exe** from the network distribution point (for example, \\DistribServer\DistShare\SumDeploy\Launcher.exe).
4. When prompted, select **Create a mobile system mass-deployment file**, and click **Next** to open the AD Summation **MSTBuilder** application.
5. The following fields must be populated for the **MSTBuilder** to build a transform file (MST) that will automate the installation code distribution process.
 - a. Select MSI file – Browse to the **Summation Blaze MU1.msi** file that will serve as your distributed application (for example, \\DistribServer\DistShare\SummDeploy\ Product\Summation Blaze MU1.msi).
 - b. Select the MST file – Browse to the location where the MST file will reside during the deployment phase, and name the MST file an easy-to-remember name (for example, \\DistribServer\DistShare\SummDeploy\ Product\MySumMST.MST).
 - c. Specify the installation codes.
 - i. **Add** – Enter an installation code and the name of the computer to which it will be deployed (use the simple computer-name/NetBIOS name).
 - ii. **Delete** – Highlight an entry and click **Delete** to remove it from the list (as needed).

- iii. **Modify** – Highlight an entry and click **Modify** to make changes (for example, change the computer name that an installation code is assigned to).
 - iv. **LoadCSV** – If a large number of desktops are being deployed, it may be easier to create a list of computer names and installation codes within a CSV editor (for example, Microsoft Excel) to import by clicking **LoadCSV**. Use this CSV as a template to add more computer names and installation codes for large deployments. In the same directory where a new MST file is created, the program will create a CSV file that can be used for later revisions and as a backup of the MST file.
 - d. Specify the installation location – Specify the path to the location where you want to install AD Summation. If you are using this deployment method to replace previous versions of the software, the path you specified will be ignored and the pre-existing path will be used in order to retain connections to existing data.
 - e. Select a demonstration case – Select at least one of the two demonstration cases to install on the stand-alone computer.
6. Double check your work and click **Generate MST** to create the MST file (and a CSV file that can be loaded later to edit the installation code list).
 7. Open the deployment tool that you will use to deploy the network-client silently (for example, Microsoft Active Directory or Microsoft SMS).
 8. When prompted for the location of the MSI to deploy, browse to the network application distribution point and choose **Summation Blaze MU1.msi** from the **Product** sub-directory (for example, \\DistribServer\DistShare\SummDeploy\Product\Summation Blaze MU1.msi).
 9. When prompted for the location of the transform file (MST file) to apply, browse to the network application distribution point and select the MST file you created previously (for example, \\DistribServer\DistShare\SummDeploy\SummMST.MST).
 10. If necessary, use the application deployment tool to specify the computers to which you want to assign the mobile system installation. For best results, AD Summation recommends that the installation is assigned only to those computers included in the MST file.

SILENT NETWORK-CLIENT INSTALLATION

NOTE: The exact procedures for silent methods of deployment vary depending on the particular application deployment program you are using. This guide discusses such procedures from a general perspective. You may need to customize them to suit your specific environment. Do NOT attempt to install a network-client AND mobile system on the same computer. An attempt to silently deploy both a network-client AND a mobile system to the same desktop will cause undesirable results. Additionally, the silent network-client installation/update is designed to run only after the completion of the server installation/update.

1. Open the deployment tool that you will use to deploy the network-client silently.
2. When prompted for the location of the MSI to deploy, browse to the Summation application directory on the SERVER and select **AD Summation Blaze MU1.msi**.

NOTE: The **Summation Blaze MU1.msi** file must run directly from the root of the Summation application directory. If you move the **Summation Blaze MU1.MSI** file from the Summation application directory on the SERVER, deployment will fail.

3. If necessary, use the application deployment tool to specify the computers to which you want to assign the network-client installation. When the silent installation is complete, the target computer may reboot to finalize the process.

SILENT NETWORK-CLIENT UPDATE

1. Open the deployment tool that you will use to deploy the network-client silently.
2. When prompted for the location of the MSI to deploy, browse to the Summation application directory on the server and choose **Summation Blaze MU1.msi**.

If necessary, use the application deployment tool to specify the computers to which you want to assign the network-client installation.

Converting Cases to the Latest Schema

There was a schema change to the underlying database structure with the latest release of the AD Summation iBlaze product. When you open a case in version 3.1 that was created in a previous version of the software, you will be prompted to convert the **Core Database** and the **Note Database**.

1. Double-click the AD Summation icon on your desktop to launch Summation.
2. A dialog will appear, informing you that the **Core Database** needs to be converted to the latest version of the schema. Click **Yes**. iBlaze will automatically back up the **Core Database** and will convert it to the current schema.

NOTE: The 3.0 conversion includes the **#Rdctd** column, providing support for searchable redactions.

3. A second dialog appears regarding the conversion of the **Note Database**. Click **Yes**. iBlaze will automatically back up the **Note Database** and will convert it to the 3.1 schema.

NOTE: You will receive these two dialogs the first time you open EVERY one of your iBlaze cases in version 2.9.1 or later.

Update License Count

Beginning with iBlaze 2.8, you can update the number of licenses for a concurrent-user edition without reinstalling the software on the server or the network clients. For example, if your firm upgrades from a 5 node user license to a 10 node user license, you can update your license count in the **Administrator Console**.

NOTE: If your node count is lower than 5 nodes, you cannot use the update node count command. Instead, please reinstall the system with the new install code. For further assistance with this, please contact AD Summation Product Support.

1. Open AD Summation iBlaze and select **File > Administrator Console**. The **Administrator Console** launches.

NOTE: The default password for the **Administrator Console** is **Admin**. Contact your system administrator if this password has been changed.

2. Login to the **Administrator Console**. On the **Group Admin** tab, click **System Options**. Select **Update Node Count** (*Figure 16*).
3. The **Update Node Count** dialog launches. Enter your new installation code in the spaces provided. Your installation code is a 14 digit numeric and alpha character value. Click **Update**.
4. A dialog appears that states **Settings Successfully Updated**. Click **Ok** on this window and click **Exit** on the **Update Node Count** dialog.
5. Click **OK** to exit the **Administrator Console**. Your iBlaze network will now reflect the additional nodes.

NOTE: If you need assistance with this, please contact AD Summation Product Support.

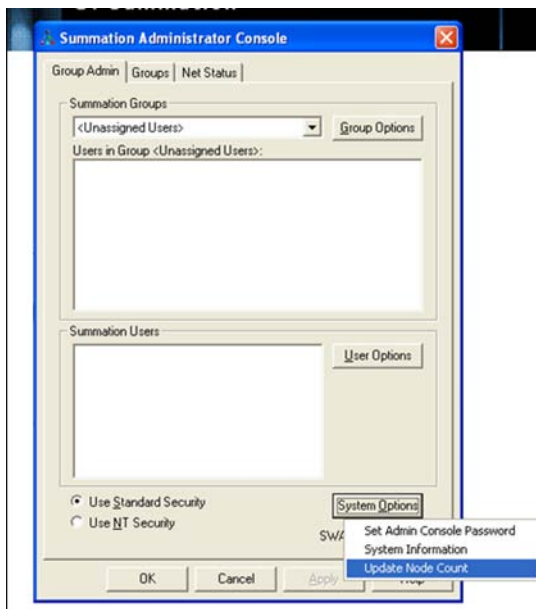


Figure 16

Upgrading to Version 3.1 of AD Summation iBlaze

This section of the document guides you through the upgrade process to version 3.1 of the AD Summation iBlaze product. Users upgrading from a version prior to 2.9.1 also have the option to convert their existing cases to take advantage of the enhanced features available in 2.9.1, 3.0, and 3.1. For more information about converting cases, see the *Case Conversion Version 3.1 Frequently Asked Questions* document in the AD Summation Support Knowledge Base.

A minimum of two computers are necessary to update a network in the AD Summation iBlaze product. The server is the computer that hosts the program files for those connecting over the network. The workstation is the computer that runs the client software that is installed from the server network share. Once the server upgrade is complete, the network-client software must be installed on all computers that will access the concurrent-user edition. This includes re-installing the client software where applicable. Workstations that contain the Mobile installation of the AD Summation iBlaze product must also be updated.

The following instructions can be used to upgrade iBlaze versions 2.5.1 – 3.1 of the AD Summation iBlaze product family.

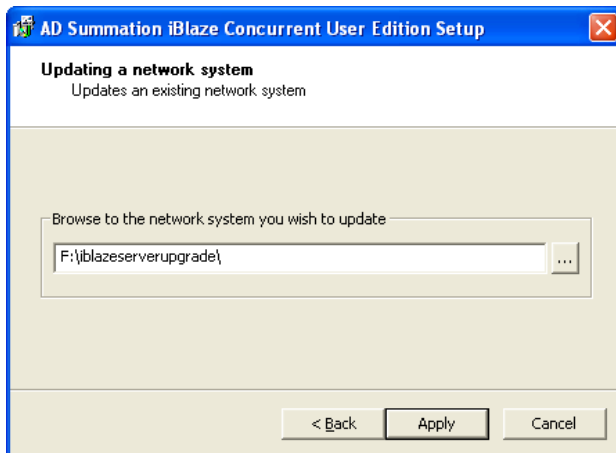
SERVER UPDATE

To update a server in the AD Summation iBlaze product family:

1. Log on to a workstation that serves as a network-client as a user with administrative privileges. You must run the server update from a network-client workstation rather than from the actual server.

NOTE: During the server update process, your Case Data is retained; however, it is recommended that you make a backup.

2. Contact AD Summation Product Support to obtain access to the AD Summation iBlaze 3.1 install on the AD Summation download site.
3. Download and unzip the 3.1 install to one of your network-client workstations. Open Windows Explorer, browse to the location where you saved the files, and double-click **Launcher.exe**. The **Installation Options** dialog appears.
4. Select **Update an Existing System**, and click **Next**.
A dialog appears stating **No mobile system was found. Do you want to update an existing network system?** Click **Yes**.
5. The **Patching a Network System** dialog appears. Browse to the network application directory (for example, `\\Server\Apps\Summation`). Click **Apply**.



6. A dialog appears stating **After the server has been updated, you must update each client installation in order to use the updated system.** Click **OK**.
7. A dialog appears indicating that the patch was applied successfully. Follow the instructions detailed in the *Network-Client Update* section of this document to update your network-clients.

NOTE: The update process backs up and moves the standard database template (made up of `Stddb.se1`, `Stddb.se2`, `Stddb.se3`, and `Stddb.frm`) to the `STDDDB` folder in the AD Summation application directory. If these database files have been modified in previous versions of iBlaze, you can retain these changes. Please contact AD Summation Product Support for assistance. If the standard database template has not been modified in previous versions, you will not be affected.

NETWORK-CLIENT UPDATE

To update a network-client in the AD Summation iBlaze product family:

1. Log on to a computer that serves as a network-client as a user with administrative privileges.
2. Browse to the network location containing the server installation (for example, `\\Server\Apps\Summation\`), open the **Client Setup** subdirectory, and double-click the **NetworkClientInstallation** shortcut.
3. An introduction screen displays. Click **Next**.
4. At the **Installation Wizard Completed** dialog, click **Finish**. Depending on the components used during the installation process, you may be prompted to reboot. Click **Yes** to reboot, if prompted to do so.
5. The network-client is updated to version 3.1. You should follow these instructions to update each network-client workstation at your firm.

MOBILE SYSTEM UPDATE

To update a mobile system in the AD Summation iBlaze product family:

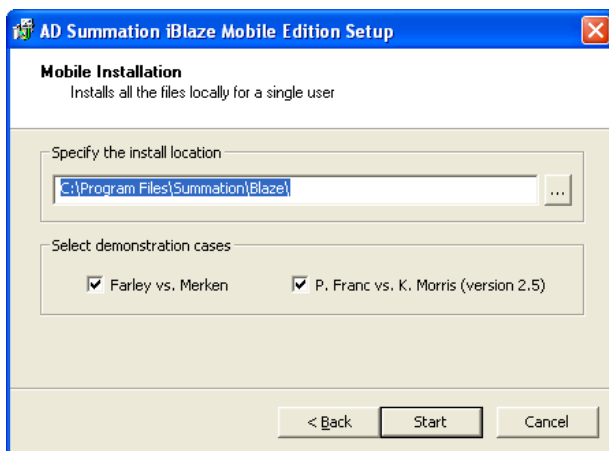
1. Log on to the computer that serves as the mobile system as a user with administrative privileges.
2. Contact AD Summation Product Support to obtain access to the AD Summation iBlaze 3.0 product family install on the AD Summation download site.
3. Download and unzip the 3.1 install to your mobile workstation. Open Windows Explorer, browse to the location where you saved the files, and double-click **Launcher.exe**.

NOTE: During the update process, your Case Data is retained; however, it is recommended that you make a backup.

4. When prompted choose **Update an existing system**, and click **Next**.
A dialog appears asking if you want to update the existing system.
5. Click **Yes**. Skip to step 12.
6. If your previous installation was a Legacy installation, you will see the see the **License Agreement** dialog.
Select **I accept the terms of the license agreement**.

NOTE: A Legacy installation is an installation that was originally run from the **setup.exe** file found in the **Legacy Setup** folder, rather than from the **Launcher.exe** file.

7. The existing installation path auto-populates into the installation path dialog box (for example, *C:\Program Files\Summation\Blaze*). Using the default location ensures compatibility with existing data.
8. Select at least one demonstration case to install by marking the appropriate checkboxes.



9. Click **Start**.
If a Legacy installation currently exists, a dialog appears confirming that you want to update the Legacy installation.
10. Click **Yes**.
The un-installer for the previous version of iBlaze appears.
11. Select **Remove**, and then click **Next**.
The un-installation of the previous version completes, and a dialog appears prompting you to confirm the un-installation of the previous version of iBlaze.
12. Click **Yes**.
The installation process continues. A dialog appears upon completion of the update process indicating that it was successful.

NOTE: The update process backs up and moves the standard database template (made up of **Stddb.se1**, **Stddb.se2**, **Stddb.se3**, and **Stddb.frm**) to the **STddb** folder in the AD Summation application directory. If these database files have been modified in previous versions of iBlaze, you can retain these changes. Please contact AD Summation Product Support for assistance. If the standard database template has not been modified in previous versions, you will not be affected.

Appendix A – Special Installation Considerations

CITRIX SERVER/TERMINAL SERVER INSTALLATIONS

Follow the installation procedures for the *network/concurrent user installation*. Run the *server installation* from a separate workstation, placing the files on a shared server network location that is available to the Citrix/Terminal server. Run the *client installation* from the add/remove programs tool on the Citrix/Terminal server. If you want to publish the AD Summation iBlaze application, the application is located in the Summation application directory on the network (for example, \\Sumserver\SumationShare\SubDir\sw32.exe). If you plan to publish the Summation network edition client, you **MUST** run the client installation from the Add/Remove programs applet prior to publication. If multiple users will be using AD Summation iBlaze simultaneously, you must plan your hardware resources accordingly.

NOVELL NETWARE ENVIRONMENTS

In a mixed Windows NT/Novell network environment, some additional issues related to the Form Editor may become apparent.

The most important consideration when planning your deployment to a Novell network server is to keep all directory names to 8 characters or less and file names to 8 characters or less (8 characters plus 3 characters for the extension is acceptable).

Please read these notes in their entirety prior to installing AD Summation iBlaze on a Novell-based network.

FORM EDITOR

- If the AD Summation application directory is on a path containing long file names or spaces, the **Form Editor** will not be available. Please confirm that the path to the files stored on your Novell server does not contain directories or files that exceed 8 characters, or spaces or special characters.
- If a new case is created in AD Summation iBlaze AND
 - IF the case name has spaces or special characters in it, OR
 - IF the name is longer than 8 characters, OR
 - IF the **Case Creation** location is on a path containing long filenames,
 - THEN the **Form Editor** will not be available to that specific case.
- If a case was created using 5.x and then converted to an AD Summation Blaze LG or iBlaze case, the **Form Editor** will function normally. This is recommended as an option only when transitioning from Blaze 5.x to AD Summation Blaze LG or iBlaze and the case is shared between the two different versions.
- When creating new cases in iBlaze on a Novell server, you can avoid Novell-related issues by creating cases with short names (8 characters or less, and no spaces or special characters). Once the case has been created, you can rename the case to something more descriptive (longer with spaces and/or special characters).

NTFS

In NTFS, short file name support **MUST** be enabled on drives that will store AD Summation case data. If short file name support is disabled, then transcript notes may not be saved correctly. Please contact your system administrator for more information regarding how to enable this feature.

Appendix B – Glossary of Terms

This guide refers to the AD Summation iBlaze installation process.

CONCURRENT-USER/NETWORK/SERVER SYSTEM: AD Summation iBlaze is licensed as either shared or stand-alone. For simplicity, this guide refers to all shared systems as concurrent-user systems. The concurrent-user system allows a number of users to share application licenses and data with each other. To connect to a concurrent-user edition server, the network-client must be installed on the workstation.

CORE DATABASE: The primary database structure that is created when you first create a case in AD Summation iBlaze.

CSV (COMMA SEPARATED VALUES) FILE: A standard method of storing fielded data for importing into a database or application. A CSV file is typically created and edited using a spreadsheet program.

INSTALLATION CODE: Code provided by AD Summation with purchase of an AD Summation system and found on a sticker on the CD-ROM package. The code is necessary to install a licensed AD Summation product on your computer or network. The code is a 14 digit numeric and alpha character value that follows the format ##A-###AA-#####A (where # represents a number and A represents an alpha character).

INTERACTIVE METHOD: Method of installation where an administrator can install AD Summation products through the installation wizard interface. This method of installation is run by double-clicking on the **Launcher.exe** file on the CD-ROM or the **SummationBlazeInstallation** shortcut in the **Client Setup** sub-directory of the Summation application directory.

LEGACY INSTALLATION: An installation that was run from the **setup.exe** file found in the **Legacy Setup** folder, rather than from the **Launcher.exe** file.

MICROSOFT ACTIVE DIRECTORY (AD): User and resource directory that allows administrative control of network users and resources. The AD features of most interest to AD Summation are the ability to deploy AD Summation iBlaze to multiple desktop computers.

MOBILE/STAND-ALONE/LOCAL/SINGLE-USER SYSTEM: AD Summation iBlaze is licensed as either shared or stand-alone. For simplicity, this guide refers to a stand-alone system as a Mobile System. The mobile system allows a single user to run an AD Summation iBlaze product with or without a network connection. Mobile systems can access shared network cases when connected to the network.

MSI: Type of file utilized by the Microsoft Windows Installer to install AD Summation products on your computer. The MSI file is a more powerful and flexible replacement for the standard **setup.exe** file.

MST/TRANSFORM: Type of file utilized by the Microsoft Windows Installer to modify the MSI file. An MST file can be built with the Summation **MSTBuilder** to facilitate the silent installation of mobile systems.

MSTBUILDER: Tool for creating the MST files used in a silent deployment of mobile systems.

NETWORK/SUMMATION APPLICATION DIRECTORY: The shared network location that hosts the shared concurrent-user system.

NOTE DATABASE: The AD Summation database that stores notes that attorneys and paralegals make to transcripts and OCR documents.

NETWORK-CLIENT: Installed on a WORKSTATION as a complement to the SERVER installation of a concurrent-user system. It must be installed on the workstation prior to accessing the concurrent-user system from the workstation.

SERVER: In this guide, SERVER refers to the combination of hardware and software that comprise the computer that hosts the concurrent-user system shared by multiple users.

SILENT METHOD: Method of installation supported by the MSI file and allows advanced network administrators to deploy AD Summation iBlaze products to multiple desktops without user interaction.

SMS (MICROSOFT SYSTEMS MANAGEMENT SERVER): Microsoft product designed to give administrators the ability to centrally

configure/administer computers over the network. SMS gives network administrators the ability to deploy AD Summation products to multiple desktop computers.

STddb: AD Summation's standard database template, which is made up of the following four files: stddb.se1, stddb.se1, stddb.se3, and stddb.frm.

UNC (UNIVERSAL NAMING CONVENTION): A method of specifying the location of a network resource. It is referred to as a UNC path. It follows the standard naming convention of \\ServerName\ShareName\SubDirectory.

WORKSTATION: In this guide, WORKSTATION refers to the computer utilized by an end user to run AD Summation products.

Appendix C – Support Resources

AD Summation offers a number of Product Support options.

SUPPORT WEB SITE

For online access to technical knowledge base, best practices, support request form, tips, and installation FAQs.

<http://www.summation.com/TrainingAndSupport.aspx>

PRODUCT SUPPORT

Monday – Friday 6AM to 6PM Pacific Time

e-mail: support@summation.com

phone: 800.786.2778 or 415.659.0105

SALES ASSISTANCE

e-mail: sales@summation.com

phone: 800.735.7866 or 415.422.0404

fax: 866.423.9194