



***Summation Pro (Single Server)***  
**MS SQL Server Edition (Self Installed)**  
v5.6.1

Installation Guide  
REV: 1/17/2015

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# Preparation

This guide is designed for all single server installations of Summation Pro with an existing SQL Server.

## Prerequisites

For server and/or component specifications please see the product System Specification Guide, located on our support portal located here <http://support.accessdata.com>.

Make sure to obtain the following from your IT department before proceeding to install:

- ▶ Hostname
- ▶ Service account name and password
- ▶ SQL Server Instance name (if applicable)

The following system settings should be configured on each server prior to product installation.

- ▶ User Account Control – Off
- ▶ Internet Explorer Enhanced Security Configuration – Off
- ▶ Firewall – Off
- ▶ Antivirus – Off

AccessData is not responsible for any environmental issues that may prevent the software installation. These types of issues will not be covered by AccessData Support.

## Hardware Requirements

Configuration	Hardware	Operating System	Database Server
<b>Summation Pro</b>	<ul style="list-style-type: none"><li>• 8 logical threads</li><li>• 16 GB RAM</li><li>• 10,000 RPM minimum (or SSD)</li></ul>	Windows Server 2008 R2 Standard (64-bit), 2012 R2* Windows 7 or 8.1	SQL Server 2008 R2, 2012* or PostgreSQL
<b>Reviewer (Recommended)</b>	<ul style="list-style-type: none"><li>• Dual core</li><li>• 4GB RAM</li></ul>	Windows 7 with Internet Explorer 9 - 11	
<b>File Server</b>	<ul style="list-style-type: none"><li>• DAS / SAN / NAS</li><li>• 10,000 RPM minimum (Storage for collected ESI, Case data, and export/responsive data)</li><li>• Please see <a href="#">ESI Matrix KB</a></li></ul>	-	

\* All Windows Servers and SQL Server should have all updates current to the latest service packs.

\*\* The storage performance requirements increase as case size increases. Refer to [ESI Matrix KB](#)

## Service Account

A domain level service account needs to be created and provisioned with the following rights and permissions. Workgroup Authentication is only supported on single server installations.

- ▶ Local Administrator on each server
- ▶ Password expiration disabled
- ▶ Logon as service
- ▶ Sysadmin (for MS SQL Server)

# Installation

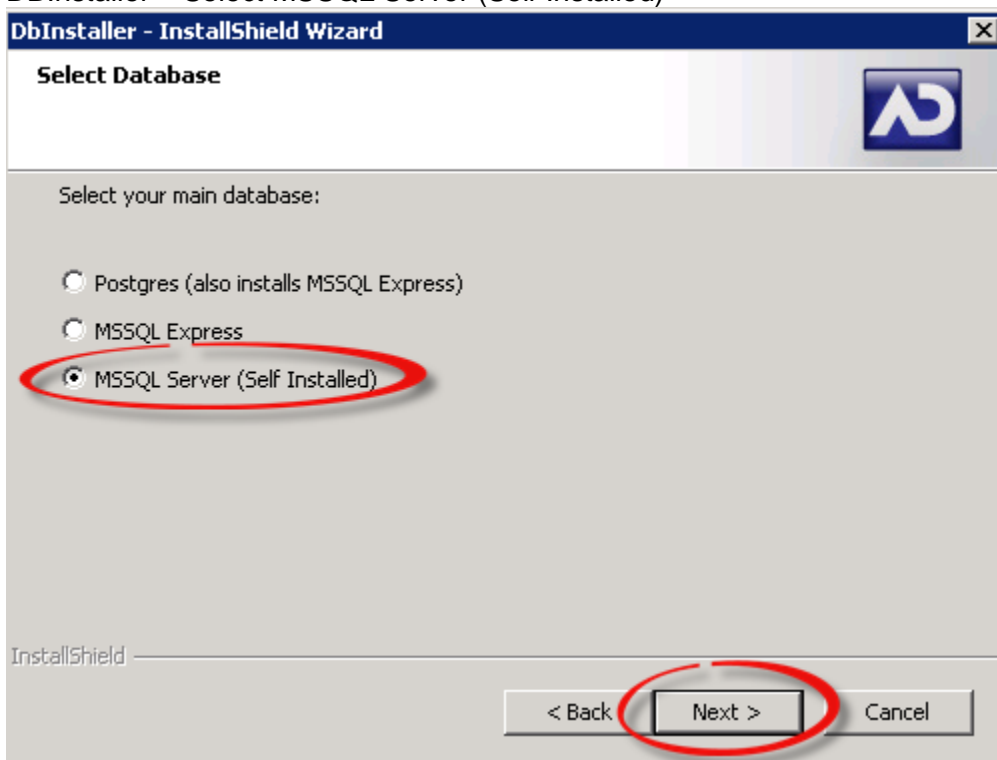
All installers must be run while logged into the server as the Service Account. The download will be provided in a zip container that should be unzipped before continuing. The executable file (.exe) should be run as administrator by right-clicking the file and choosing "Run as administrator." Run the installers locally on the system you are installing on. All downloads are located at [this link](#). Reboots will be required during this process save any pending work.

## INSTALL ACCESSDATA SUMMATION (64 BIT).EXE

- ▶ Right Click on the installer and choose run as administrator



- ▶ DBInstaller – Select MSSQL Server (Self Installed)



- ▶ Click Finish
  - You may get a pop up "Checking Ports..." If you only see 80 and 443 listed here click Exit. If you see other ports taken please contact support before proceeding.
- ▶ Click Install
- ▶ Accept License Agreement
- ▶ Confirm Install Path
- ▶ Confirm Processing Temporary Folder location
- ▶ Enter service account information and choose authentication type see Appendix B.
- ▶ Enter SQL Database and method of authentication
- ▶ See Appendix D if you are Upgrading.
- ▶ After complete close and restart your computer

## POST INSTALLATION

- ▶ Log into Summation and install the necessary viewers.
  - Installers for the viewers are located here:

- C:\Program Files\AccessData\MAP
- ▶ It is recommended you run through the application to confirm a proper installation using this [Basic Acceptance Test](#). Contact support if there are any issues.
- ▶ Deploy an SSL Certificate in IIS. A public SSL certificate is recommended.

## Performance Expectation

Below are performance numbers based on a Dell R520 with following specifications:

- ▶ Processor: 16 logical threads
- ▶ RAM: 32 GB RAM
- ▶ Hard Drives:
  - C: RAID 0 2 x 10k RPM SCSI
    - OS
  - D: RAID 0 2 x 10k RPM SCSI
    - Case Data
    - Evidence
  - E: RAID 0 2 x 10k RPM SCSI
    - Database
  - F: RAID 0 2 x 10k RPM SCSI
    - TempDB
    - ADTEMP

Processing performance based on settings below using a 100 GB of PSTs with attachments ranging from Adobe, Office and standard image type image types.

- ▶ Processing Default Options:
  - Source Size: 100 GB
  - Expanded Size: 223 GB
  - Total Objects: 1.5 Million
  - Total Time: 8 hours
  - Average (based off source size): 12 GB/HR
- ▶ Processing with OCR:
  - Source Size: 100 GB
  - Expanded Size: 223 GB
  - Total Objects: 1.5 Million
  - Total documents OCR'd: 18607
  - Total Time: 19 hours
  - Average (based off source size): 5 GB/HR
- ▶ Bulk Labeling
  - Total Documents: 10k
  - Total Time: 21 seconds
- ▶ Bulk Coding
  - Total Documents: 10k
  - Total Time: 3 minutes
- ▶ Native Production:
  - Object Count: 10k
  - Total Time: 10 minutes
- ▶ Tiff Production: 10k documents
  - Object Count: 10k
  - Total Page Count: 27k
  - Total Time: 3 hours
- ▶ PDF Production:
  - Object Count: 10k

- Total Time: 3 hours
- ▶ TIFF Production with Branding:
  - Object Count: 10k
  - Total Page Count: 27k
  - Total Time: 5 hours

## Appendix A – Virtual Dongle

Refer to the [KB Virtual Codemeter Activation Guide](#)

## Appendix B – Authentication Method

Refer to the [KB Authentication Methods](#)

## Appendix C – Database Installation

### SQL Server Considerations

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The SQL Server hardware is crucial to the overall performance for every function in Summation Pro. There is a direct relationship to user experience, evidence processing, importing, exporting, producing, and many other functions that rely on SQL Server performance. Please discuss the details of your implementation with your support representative. AccessData recommends that a Database Administrator (DBA) assist in the configuration and continued operation of the database.

#### CONFIGURATION

AccessData requires the Default US Collation on SQL Server “SQL\_Latin1\_General\_CP1\_CI\_AS.” Microsoft SQL Server is a memory intensive application and will consume all available memory if no max memory is set. A minimum and maximum memory should be allocated to Microsoft SQL Server in scenarios where SQL requires sharing memory with other applications or components (e.g., if the server has 32GB RAM, SQL should use 16GB). Contact your support representative for recommendations for minimum and maximum RAM Settings. The standard Microsoft SQL server best practices apply (<http://technet.microsoft.com/en-us/library/cc966534.aspx>).

#### MAINTENANCE

For MS SQL, database maintenance is a relatively easy undertaking. MS SQL tasks and Maintenance plans can be configured to backup, check integrity, maintain indexes, replicate the databases to redundant MS SQL servers, and run customized T-SQL commands. Discuss with your support representative in regards to how often certain tasks are run and how they affect performance. For more information on MS SQL Recovery, please use this article (<http://msdn.microsoft.com/en-us/library/ms189275.aspx>). As a general rule here is a standard set of maintenance tasks and their frequency based on a 4-hour recovery time:

- ▶ Full Backup – Weekly – Friday 12AM
- ▶ Incremental Backup – Daily – EOB 7PM
- ▶ Transaction Log Backup – Every 4 hours
- ▶ Reorganization of Indexes – Daily – 6AM (not Sat/Sun)
- ▶ Rebuild Indexes – Weekly – Saturday 12AM
- ▶ Update Statistics – Daily – After reorg. After rebuild

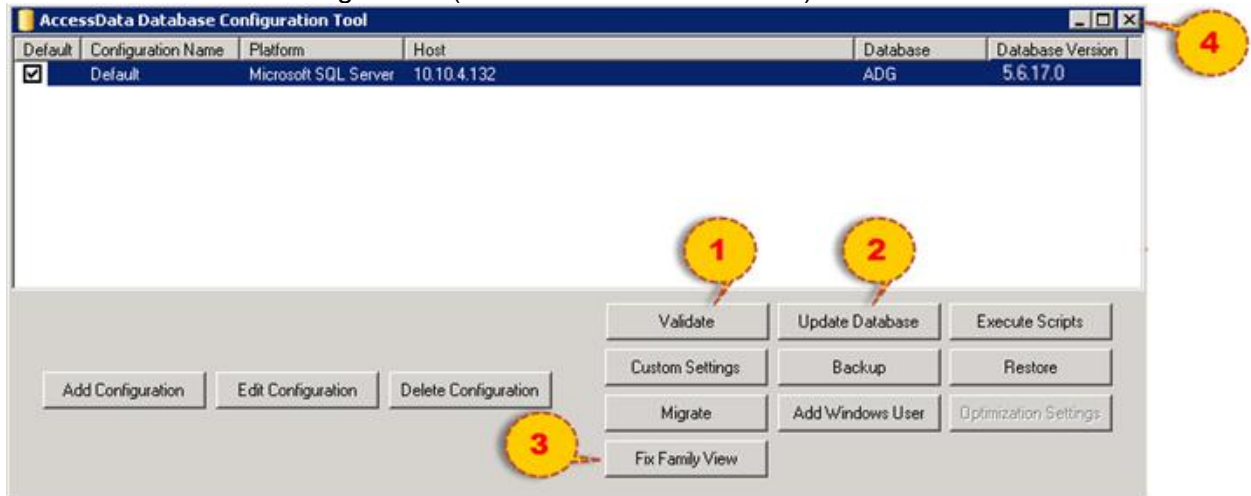
- ▶ Maintenance Tasks – Weekly – Friday EOB 7PM

# Appendix D – Upgrades

Be sure that you have performed a backup of the databases prior to attempting upgrade or use the backup during the upgrade process.

## UPGRADE SUMMATION PRO DATABASE

- ▶ Click on the Default Configuration (this will enable the buttons)



- ▶
  1. Click Validate
    - Check all options and click validate
    - For a description visit the [Validate KB](#)
  2. Click Upgrade Database
    - a. NOTE: Not all upgrades require upgrade if everything is grayed out when you click this option there is no update necessary.
    - b. Choose a Backup Location
    - c. Use SA log in to SQL Server or Windows Authentication
    - d. Choose to Backup Application Databases
    - e. Upgrade (Any Errors immediately contact support with error message)
  3. Click Fix Family
    - a. Check anything that shows in the next dialogue and choose fix family.