
ETC's Best Practices Series:
CHECKLIST FOR MOVING TO SUMMATION
VER. 2.8

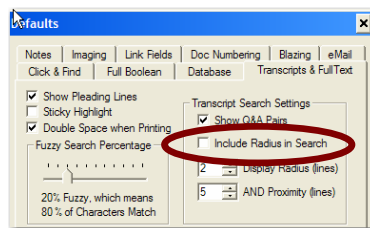
- Make sure you have a good backup of all of the CaseData files. If you want to archive some of the cases, now is the time to do it, before you move to ver. 2.8.
- Run utilities (Backup/Check/Pack/Blaze) on all of your cases both BEFORE you move to ver. 2.8 and AFTER you've converted your cases to ver. 2.8.
- Identify any cases that contain heavily customized forms. "Heavily customized" means that you have added more than 5 new lookup tables or more than 10 new fields to any particular form.
 - There is a limit to the number of fields that can be on a form, the number of columns in a table, the number of tables in a database. Converting to 2.8 adds some additional tables as well as 5 fields to each lookup table in your case. You do not want to exceed 800 fields per table in your cases. If you do, the conversion process may well freeze midway through and you will have to recover your backup.
- Confirm none of your cases uses a field called FOLDERS. (Note: The default set-up for the eTable includes a field called FOLDER (no "s" on the end). This field will not cause any problems.) If you have data in a field you've added called FOLDERS, you should move the contents of that field into a new field (using the Advanced features of Global Replace) so that you will be able to utilize the Folders function in ver. 2.8.
- Create a form for each table into which you add data (e.g., StdTable and eTable), calling is the MASTER form. Every field that is contained within the table associated with that form should be placed on the form. It doesn't have to be pretty, but it does need to be all-inclusive. Why? Because as of version 2.8, you can't perform a global edit and use fields that are not displayed on the current form. So save yourself a headache and create a master form at the beginning, particularly if your users do not know how to or do not permission to use the Form Editor.
- Because of the addition of the Spellchecking functionality, care must be taken that data in what would be considered metadata fields will not be included in the spellchecking. You can simply ensure that they don't appear in the Column view when spellchecking is run, but an extra precaution is to make each of the metadata fields for the eForm read-only (using the Form Editor's Attributes tab for each field on the form).
 - When you create a new case in version 2.8, these metadata fields are already marked "read only". Unfortunately, one of the fields Summation considers "meta data" (for emails) is the CC field. If your users are coding from images, they will not be able to enter information into the eForm's CC field until the read-only attribute is removed. Consider adding a new field specifically targeted for coding from images called COPIED. That field can be used for CC and BCC, and you won't have to be concerned with the "read only" attribute.

For more information or to inquire about training or technical assistance, you can contact us as follows:

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- ❑ Unlike what you may have been advised to do in previous versions, you should instruct users to uncheck the "Prompt to Save" option on Database tab under the Options – Default menu. If users don't change this option, then they will have to hit the SAVE button on the toolbar every time they add Issues or items via the Foldering feature. Please note, however, that uncheck the Prompt nag screen can have some consequences for new users, including accidental deletion of data because they saved the form after accidentally clearing a field (using, for example, the F3 key).
- ❑ The spellcheck feature may impact on the user's NORMAL.DOT in Word. (This also sometimes happens when Word is selected as the Outlook e-mail editor.) Be sure to maintain a safety copy of the NORMAL.DOT template, particularly if it is heavily customized by you or your users.
- ❑ The structure of the Help system has changed. If you want to retain the older version of Help for reference purposes, copy all of the *.CHM files in Summation's program directory. The new Help file is in HTML format. If your users want to save Favorites, they have to use Internet Explorer's Favorites options.
- ❑ When ver. 2.8 was released, it was discovered that using Summation's backup feature did not backup the .frm file for the database. This is important is you use the backup feature to help preserve a form before you create new ones or modify existing forms. You may wish to use Summation's COPY DATABASE function, rather than the Backup function, until this issue is resolved by Summation.
- ❑ Review the Issues lookup table to see whether you might want to shorten some of the issue names. Summation ver. 2.8 permits sub-issues. If your issue names are long, and you utilize the sub-issues feature, then the issues will appear in Tallies, for example, in an almost unreadable format. Example:
 - NEGLIGENCE – ARCHITECT'S NEGLIGENCE might end up with sub-issues and appear as follows in the new Issues field:
 - NEGLIGENCE – ARCHITECT'S NEGLIGENCE – FAILURE TO UTILIZE INDUSTRY STANDARDS ON BLUEPRINTS
 - That's a very long line for running a tally
- ❑ Modify the Options – Defaults – Database Note Sort Length field to 99 to help accommodate the sub-issues strings in Tallies. In versions 2.6 and 2.7, Summation unfortunately set this to 10 characters, and you were advised to increase it to at least 30 or 45. Now, set it as high as it can go if you intend to use sub-issues: 99.
- ❑ You no longer need to instruct your users to turn off *Include Radius in Search*. Summation has turned it off by default.



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- If you have customized the STDDB forms in your current version, make sure you make a copy of the STDDB before you install version 2.8. Version 2.8 overwrites the old STDDB. Note that if you decide to overwrite the version 2.8 STDDB with your customized version, the Foldering feature may not be available to you. It might be better to re-customize the new STDDB form to contain your customized fields.

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