

# Summation Certified Case Manager (SCCM) Exam Study Guide

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**Note:** This study guide is designed to cover all areas of the Summation Project Management platform (including Advanced Processing) but is not a copy of the actual exam.

- 1. Project Manager responsibilities are broken down into two (2) distinct areas. Which of the following accurately reflects the areas being managed?**
  - a. Security and Data Loading
  - b. Permissions and Database Customization
  - c. Security and Project Management
  - d. Pre-Review and Review
- 2. You can open Summation from any computer that has network connectivity to the Summation server.**
  - a. True
  - b. False
- 3. In an install NOT using Windows Authentication for access, all users are required to enter proper authentication credentials to access Summation. What does this mean?**
  - a. The user has to enter an IP address and password
  - b. The user has to enter a user name and the user's mother's maiden name
  - c. The user has to enter an assigned user name and password
  - d. The user has to enter an assigned sixteen digit code and associated password
- 4. After logging into the application, what is the default landing page?**
  - a. The Home page
  - b. The Management tab
  - c. Project Review
  - d. The Data Sources page



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5. **It is expected that a Project manager will have full rights and permissions granted by the Administrator.**
  - a. True
  - b. False
6. **Where do you find the menu option to logout?**
  - a. Select Logout from the Username menu
  - b. Click on the Litigator's Bag icon and choose Logout
  - c. In the drop down menu, click on File > Exit
  - d. Right click on the AD logo and select Logout
7. **The Evidence tab on the Home page displays information related to evidence that has been processed, as opposed to evidence that has been imported.**
  - a. True
  - b. False
8. **A custodian is considered to be the owner of the evidence.**
  - a. True
  - b. False
9. **The Processing Options tab identifies the options for the project selected in the Project List. Which of the following statements are true? (Choose all that apply.)**
  - a. The Processing Options cannot be edited once a project is created
  - b. The Processing options were finalized and set when the project was created
  - c. The Administrator can set default processing options for each project that is created
  - d. The default options set by the program cannot be altered
10. **Users or User Groups must be associated with a markup set for a user to have access to the set in Project Review.**
  - a. True
  - b. False
11. **Persistent highlighting profiles can be created that will highlight predetermined keywords in a document displayed in the Natural panel.**
  - a. True
  - b. False
12. **Which of the following statements about Highlight Profiles is true? (Choose all that apply.)**
  - a. Highlight Profiles can be toggled on and off in Project Review
  - b. A single profile can only have one highlight color assigned to it
  - c. You can create as many Highlight Profiles as needed
  - d. All Highlight Profiles must be created before loading data.

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13. Which of the following activities are monitored on the Work Lists tab?
  - a. Searches
  - b. Imaging
  - c. Label Assignments
  - d. Imports
  - e. All of the above
14. The Project Details tab on the Home page displays the name of the user who created the project and the date it was created.
  - a. True
  - b. False
15. The navigation bar at the bottom of the Project List can display the total number of projects that have been created in Summation.
  - a. True
  - b. False
16. Checking the box next to a project's name in the Project List gives you access to which feature?
  - a. Assigning Permissions
  - b. Delete Project
  - c. Document Review
  - d. Manage Notifications
17. The Custom Properties feature allows you to create custom fields for specific information about your projects. Which of the following might be an example of the type of data you might wish to track? (Choose all that apply.)
  - a. A Project Matter Number
  - b. Permissions
  - c. Department or Division
  - d. Evidence Custodians
  - e. Imported Data
18. In the Project Folder path in the Project Details tab, a unique identifier created programmatically is assigned when a project is created. What is this identifier?
  - a. A random, unique string of 32 alpha-numeric characters
  - b. The project name plus the designation Sseci
  - c. The first five characters of the project name followed by the creation date
  - d. The unique identifier can only be seen by the administrator
19. If a user has been granted the permission to create new projects the Create New Project button will be visible at the top of the Project List.
  - a. True
  - b. False

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- 20. In the Create New Project dialogue box, which of the following tabs might you see? (Choose all that apply.)**
- a. Processing Options
  - b. Custodians
  - c. Info
  - d. Add Evidence
- 21. If you have been granted permission to identify the network location where the application will store project information, what information is necessary to browse out to select that location?**
- a. The IP address or network path
  - b. The Administrator's login and password
  - c. Your login and password
  - d. Summation's project identification number
- 22. It is possible to manually create a folder, naming it after the project, prior to creating a new project for organizational purposes.**
- a. True
  - b. False
- 23. When processing evidence, which of the following defines a custodian?**
- a. The party responsible for maintaining the chain of custody of the evidence
  - b. The originating party of the evidence
  - c. The party responsible for the security and storage of the evidence
  - d. The party requesting the evidence
- 24. Any user logging into the application can see all administrative features and any project data.**
- a. True
  - b. False
- 25. A user, or user group, must be associated with a project in order to see and work with project evidence.**
- a. True
  - b. False
- 26. On the Home page, which tab is used to create roles?**
- a. Custodians
  - b. Permissions
  - c. Evidence
  - d. Work Lists
- 27. What are the results of editing a role associated with users in a project?**
- a. The role is changed for those users associated with the project and any other project to which they are associated
  - b. The role is changed for the one project and its associated users
  - c. You cannot edit a role once it has been created
  - d. The role is edited for all projects and all users

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- 28. Users or groups can be disassociated with a role or a project.**
- True
  - False
- 29. According to best practices, when are Access Level Permissions granted?**
- Prior to processing and/or importing evidence
  - Following the processing and/or importing of evidence
  - During the project creation
  - All of the above
- 30. A custodian must be created and associated with a project before processing evidence for this information to be available during document review.**
- True
  - False
- 31. The bottom panel of the Custodians tab displays what information?**
- The project the Custodian is associated with
  - Evidence items associated with the Custodian selected in the top panel for the selected project or all projects
  - The users granted permission to manage custodians
  - The global list of custodians
- 32. How many custodians can be associated with a project at one time?**
- 1
  - 5
  - 10
  - As many as you choose
- 33. How can you remove a custodian's association with a project?**
- On the Custodians tab, select the custodian name, click the red line icon on the right side of the panel
  - On the Custodians tab, check the box next to the custodian name and click on the green trash icon
  - On the Custodians tab, check the box next to the custodian name and click on the Remove Associations icon
  - Once a custodian is associated with a project it cannot be removed
- 34. What two data types are processed?**
- Tif and OCR
  - Evidence Images and Native files
  - Delimited files and jpgs
  - Text messages and voicemails
- 35. Cluster Analysis can only be initiated during evidence processing.**
- True
  - False

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- 36. What is the simplest method for loading large numbers of native files and associating custodians?**
- Folder Import
  - Import Individual Files
  - CSV Import
  - There is no method for batch loading large number of files
- 37. How many custodians can be associated to evidence processed using the Folder Import method?**
- An infinite number
  - 1
  - 10
  - 100
- 38. When are Document Groups created for processed evidence?**
- During evidence processing
  - At the conclusion of evidence processing
  - In Project Review, after processing is complete
  - Document Groups are not necessary for document review
- 39. Prior to processing evidence, it is important to identify where the evidence images or native files will reside for the life of the project because once processed, it cannot be moved, renamed, or otherwise reorganized.**
- True
  - False
- 40. Which of the following are benefits of using a CSV file to import evidence? (Choose all that apply.)**
- You can easily and accurately identify all evidence items loaded into a project when a single file is processed
  - Quality control checks are easy to apply with a single file
  - It is quicker to enter all evidence item paths in a CSV file than to browse each one individually in the add evidence windows
  - Custodians can be associated in the CSV
- 41. A Document Group is a folder created or identified during the import process to categorize and store imported evidence.**
- True
  - False
- 42. Clicking the Map Fields button during the import evidence process checks the import file for errors related to the mapping of the import file fields to those found in the database.**
- True
  - False
- 43. If the Import Option "First Row Contains Headers" is selected, the headers in a load file are identified, and the application will attempt to map them to existing database fields.**
- True
  - False

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**44. Where can you track the progress of imported data?**

- a. On the Home page under the Work Lists tab
- b. On the Home page under the Evidence tab
- c. On the Home page under Project Information
- d. On the Management page under System Logs

**45. Markup sets are created and users are assigned on the Home page.**

- a. True
- b. False

**46. What is the purpose of a Tagging Layout?**

- a. To allow reviewers to annotate documents
- b. To set up a format for coding documents
- c. To identify a workflow for assigning labels
- d. To setup your workspace windows

**47. Where do users with the necessary permissions access and use the Tagging Layout?**

- a. On the Home page
- b. On the Management page
- c. In Project Review
- d. On the Tagging Layout tab on the Home page

**48. In Project Review, what is the name of the panel where tagging layouts are displayed?**

- a. The Review panel
- b. The Natural panel
- c. The Activity panel
- d. The Coding panel

**49. Custom Fields can be included in a Tagging Layout.**

- a. True
- b. False

**50. Once a Tagging Layout is created, it cannot be edited or deleted.**

- a. True
- b. False

**51. If you decide you want to alter who can see a Tagging Layout, where do you remove the user or user group association?**

- a. Home page > Tagging Layout
- b. Project Review > Coding panel
- c. Management tab > Users or User Groups tab
- d. Users or user groups cannot be disassociated from a Tagging Layout once assigned



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- 52. When a selected Highlight Profile is enabled in Project Review, the pre-determined keywords will automatically be highlighted in the Natural panel.**
- True
  - False
- 53. How many sets of keywords and highlights can be set up on one Highlight profile?**
- 1
  - 5
  - 10
  - As many as there are colors to be assigned
- 54. Custom field names and descriptions can be edited, but not the display type.**
- True
  - False
- 55. The radio button is used for exclusive coding. What does that mean?**
- There are multiple options to choose from, and more than one can be selected
  - There are multiple options to choose from, but only one can be selected
  - There is no such thing as exclusive coding
  - There are multiple options to choose from
- 56. Where are custom fields displayed for use by an end-user or reviewer? (Choose all that apply.)**
- On the Coding panel within Project Review
  - On the Custom Fields tab on the Home page
  - In the Item List within Project Review
  - On the Tagging Layout tab on the Home page
- 57. Where is the option to initiate Global Replace found?**
- On the Home page, on the Project List panel
  - On the Home page, on the Work Lists tab
  - In Project Review, in the Item List panel
  - In Project Review, in the Coding panel
- 58. Custom Fields can be included in Global Search and Replace.**
- True
  - False
- 59. Global Replace can only be performed on the complete data set.**
- True
  - False



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- 60. Where would you find the status of a Global Replace job?**
- On the Evidence tab on the Home page
  - On the Project Details tab on the Home page
  - On the Work Lists tab on the Home page
  - On the Work Manager Console tab of the Management page
- 61. How many Global Replace jobs can be submitted in a single project at one time?**
- 1
  - 5
  - 10
  - Unlimited
- 62. From how many labels can you choose when creating a production set?**
- 1
  - 2
  - 3
  - As many as you need
- 63. When creating a production set, the system is creating another set of the documents that represent the production set.**
- True
  - False
- 64. The user has retrieved the documents included in the production set by filtering by the related label. It is possible to see the production history of those specific documents in the Production panel.**
- True
  - False
- 65. What feature allows the user to create a production set with the same configurations and specifications by default?**
- Production History
  - Making a copy of a prior production set
  - Templates
  - Export Options
- 66. In which section of creating a production set can a user choose to limit the size or the number of items contained in a folder?**
- Columns to Include
  - Volume Document Options
  - Templates
  - Files to Include
  - Image Branding Options

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- 67. Templates created for production sets or export sets are available globally for any project.**
- True
  - False
- 68. Which of the following formats are available for export sets?**
- AD1
  - AFF
  - Native Files
  - Load Files
- 69. When using the Load Files export format option, the appropriate default delimiters for a text file are provided (where required).**
- True
  - False
- 70. How many times can you export a production set or export set?**
- 1
  - 10
  - 100
  - As many as necessary
- 71. It is recommended that you identify a location on your network and create an export folder for your productions and export sets.**
- True
  - False
- 72. What best practice is strongly encouraged for all project management?**
- Load the data first
  - Create and follow a project plan
  - Develop a good relationship with your vendor
  - Make sure the software is installed correctly
  - All of the above
- 73. What are the five folders about which the project manager needs to be aware?**
- Admin folder, Project Data folder, Projects folder, Images folder, Profiles folder
  - Windows folder, Project folder, Data folder, Reports folder, Profile folder
  - Program Files (x86) folder, Program Files folder, Users folder, Temp folder, Documents folder
  - Project Data folder, Job Data folder, Evidence folder, Exports folder, Production Exports folder
  - Project folder, Alpha-numeric folder, Reports folder, JT folder, XX folder

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- 74. Best practices indicate that you should do what before creating a project and processing any evidence, for example?**
- Create several organizational folders to aid in better project management--a project folder, a jobs folder, an evidence folder, a production set folder, an export set folder
  - Create and associate custodians with the project
  - Include "DO NOT MOVE" in the evidence folder path
  - Identify the type of data and the corresponding processing requirements
  - All of the above
- 75. Which processing mode contains the most common, default options selected in the legal industry?**
- Forensic
  - Quick
  - Standard
  - Security
  - Standard No Search
- 76. If you are in possession of a forensic image and have been instructed to investigate any deleted files that may be recoverable, what processing mode would you use to process that drive?**
- Forensic
  - Quick
  - Standard
  - Security
  - Standard No Search
- 77. If you are in possession of Microsoft Outlook PST or Lotus Notes NSF files and need to extract the contents of those files, which mode would you choose to process that data?**
- Forensic
  - Quick
  - Standard
  - Security
  - Standard No Search
- 78. Where can a number of reports be found to aid the in managing evidence processing for a project?**
- The Project Details panel on the Home page
  - The Reports tab on the Home page
  - The System Configuration tab on the Management page
  - The Work Lists tab on the Home page
  - All of the above

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## 79. What is OCR?

- The process used to extract the searchable text layer from eDocs
- The process of filtering out undesirable file types during processing
- The process of applying Optical Character Recognition to an image file, usually a scanned paper document, in order to generate a searchable text file
- The process of extracting user-specified metadata that will be captured in searchable text files during review

## 80. How does OCR differ from extracted text?

- They are the same
- OCR is the searchable text generated from scanned documents, whereas extracted text is the searchable text contained by many eDocs
- OCR is more accurate than extracted text when searching
- Extracted text costs more to process and load into a project
- All of the above

## 81. How could you identify whether an item has extracted text or OCR text in the viewer?

- With the record selected in the Item List, the Filtered radio button will be selected on the Text panel within the Viewer
- With the record selected in the Item List, the OCR check box is checked within the Natural panel
- With the record selected in the Item List, the OCR radio button will be selected on the Text panel within the Viewer for OCR text and the Filtered radio button will be selected on the Text panel within the Viewer for extracted text.
- None of the above

## 82. If you did not enable the OCR option prior to processing, what two methods could you use to generate OCR post-processing within the project? (Select all that apply.)

- Reprocess the data with OCR option enabled
- OCR one document at a time within Project Review
- OCR documents in bulk within Project Review
- Use a third party tool to OCR and load the OCR with a load file
- All of the above

## 83. The processing option Email Body Caching is used most often in situations where the export requires data be in what format?

- DII load file
- Concordance load file
- Relativity load file
- Catalyst load file
- All of the above



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- 84. Which of the deduplication options, Project Level or Custodian Level, would compare items as they are processed to the entire contents of a project?**
- Project Level
  - Custodian Level
- 85. Which level is most likely to result in fewer items being deduplicated in your project? Why?**
- Project Level - Compares all incoming Emails and eDocs to all previously processed evidence
  - Custodian Level - Compares incoming Emails and eDocs of a custodian to any previously processed evidence from the same custodian
  - Project Level - Compares all incoming Emails and eDocs to all previously processed evidence, except that evidence associated with a custodian
  - Custodian Level - Compares all incoming Emails and eDocs to any previously processed evidence associated with a custodian
- 85. Why is the turtle icon important to keep in mind when processing data?**
- It improves evidence processing performance
  - It indicates that the associated item is a beta and still in development
  - It is an indicator that the associated item is important and should not be overlooked
  - It is a caution indicating that the associated item will increase evidence processing time
- 86. How do you run the Cluster Analysis utility after processing data?**
- You cannot run Cluster Analysis after processing
  - Only the Administrator can run Cluster Analysis after processing
  - Click on the Cluster Analysis tab on the Home page and select the "Run CA" option
  - Click on the Add Data to Project and select Cluster Analysis
  - None of the above
- 87. How many languages are checked when using the Basic/Extended Language ID option?**
- 10/67
  - 10/50
  - 5/67
  - 5/50
  - None of the above
- 88. Why would the Language field be empty for a particular document?**
- The document in question is a photograph
  - The document in question is an audio file
  - The document in question is some kind of graphic file like a blueprint
  - The document does not have any associated text
  - All of the above

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**89. What do each of the options below represent within a bulk coding dialog:**

**1. Dash; 2. Empty; 3. Check?**

- a. 1. Do nothing; 2. Remove the value from the documents; 3. Assign the value to the documents
- b. 1. Remove the value from the documents; 2. Do nothing with the value; 3. Assign the value to the documents
- c. 1. Assign the value to the document; 2. Do nothing with the value; 3. Remove the value
- d. A and B
- e. None of the above