Installation Guide

Eclipse SE® by Ipro 2019.0.0

Q4 2019

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Introduction

Ipro® Eclipse SE™ is the all-in-one desktop eDiscovery and review tool that gives your organization effective control all aspects of its cases with a single discovery management application. It allows you to focus on the case, not the technology.

About Eclipse SE Licensing

While there is no limit to the number of users who can be defined in Eclipse SE, the number of users who can use Eclipse SE modules concurrently cannot exceed the number of licenses that have been purchased. Licenses are not dedicated to specific users. Separate licenses are required for the following Eclipse SE modules:

- Eclipse SE Desktop and Administration – one license allows access to both products, concurrently if needed.
- Eclipse SE Print Manager
- Ipro Publish
- Eclipse SE Scanning module1
- Summation Migration module1
- SE Streaming module1,2

If one user needs to use all of the above products/functions at the same time, a separate license for each product would be required.

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1   **NOTE**: The Scanning, Summation Migration, and Streaming Ingestion modules must be authorized through the Ipro Authorization Server (not through local authorization); see "Remote Authorization (Ipro Authorization Server)".

2   **NOTE:** In 2017.3.3, although a license is required to use the streaming ingestion module, non-streaming functionality can be used for the next available job if no other licenses are available.

Typical Installation

The following diagram shows Ipro Eclipse SE and related components in a typical installation.
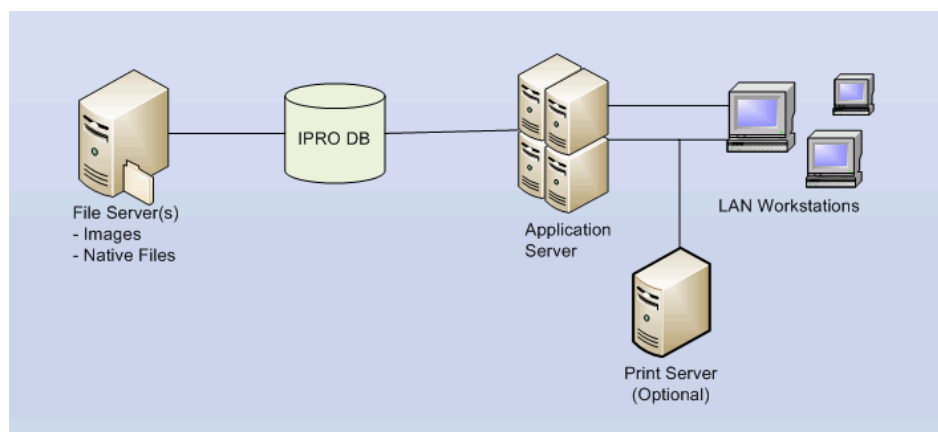
About this Guide

This guide walks you through the installation of Ipro Eclipse SE™. In this document, a "module" describes an individual functional area in Ipro Eclipse SE. The terms "component" and "feature" may also be used.

	NOTE: This guide applies to new installations. If you are upgrading Ipro Eclipse SE to the current release, see the *Ipro Eclipse SE Upgrade Guide*.

Separately installed Eclipse SE modules are listed in the following table.

Module	Description
Eclipse SE Administration	Used by administrators to define and manage all aspects of Eclipse SE, ranging from case set-up to production.
Eclipse SE Desktop	Used by reviewers to view and annotate case documents. Reviewers can apply tags, redact content, and perform many other tasks.
Eclipse SE Print Manager	This optional module allows users to send print jobs to a central print manager, thus freeing up personal computer resources. It is recommended that this module be installed on a workstation that is separate from other modules.
Ipro Publish	This optional product allows you to create standalone versions of Eclipse SE cases from Eclipse SE cases, Eclipse cases, Ipro Classic Suite projects, or other load files for use by reviewers outside of your Eclipse SE environment.

	Note: If you have purchased any of the following optional modules, they will be installed in conjunction with the installation of Eclipse SE Desktop and/or Administration (as applicable): • Scanning module[3]: Enables scanning from the Eclipse SE Desktop. • Summation Migration module[4]: Migrate AccessData® Summation® cases directly into Eclipse SE. • SE Streaming module[5]: Provides faster processing for native file ingestion. This module requires a 64-bit operating system.

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[3]   Available in Eclipse SE 2015.0.0 and later.

[4]   Available in Eclipse SE 2016.3.1 and later.

[5]   Available in Eclipse SE 2016.3.2 and later.

Contacting Ipro Tech Support

Support hours

- General Support Hours: Monday – Friday, 5 a.m. – 7 p.m. (GMT-07:00) Arizona

- After Hours: 24 x 7 for urgent issues

How to contact us

- Phone: 877-324-4776

- Web: "Submit a Ticket" under "Resources" at http://iprotech.com

- Email: support@iprotech.com

About our support system

All issues entered by phone, email, and web will generate a new support ticket and an auto-response will be sent to the sender with the new issue number. Reply to this email for all future email correspondence on that issue to prevent a duplicate ticket from being generated.

	Web Users: You will need to register the first time you visit our website. After that, you can simply log in with your username and password. .

By default, you will be able to view, edit, and report on all issues entered under your contact ID (email address). Our support platform also allows contacts from your organization to be listed as "Support Administrators," giving them the ability to view all issues entered by anyone inside the organization. If this is something you wish to be granted, please have your management contact Ipro Support at support@iprotech.com with "Support Admin Request" in the subject line and the names and email addresses of those to be given access in the email message.

Support prerequisites

Please have the following information available before contacting/emailing Support:

- Ipro Tech software name and version number (for example, "Eclipse SE [Category]")

- Operating system running the Ipro software and service pack number (for example, Windows 7 SP1)

- Description of problem, screenshot and complete transcript of error received if applicable

- Summary of steps that produced the problem/error

- Email a ZIP file containing any relevant screen shots, error messages or files (for example, log file)

- If you email Support, please include the following in the email subject line:

```
Product name version/company – Nature of request, for example: Eclipse
SE <version>/ABC Co. – Install/database issue
```

Installing Ipro Eclipse SE the First Time

Overview

This section discusses how to prepare for Ipro Eclipse SE installation and presents the following three methods for deploying Ipro Eclipse SE across your workstation or network:

- Using the Ipro Eclipse SE Setup wrapper installation
- Silent installations
- Administrative installations

Also included are details on adding or removing modules after initial installation.

Preparation

Computer and domain considerations

Before installing Ipro Eclipse SE, identify the computers on which Eclipse SE modules will be installed. For requirements, see the *Ipro Eclipse SE System Requirements* document.

In multiple-domain environments such as networks with a resource domain or those with multiple domains with different trust levels, ensure that installed Eclipse SE components will be able to communicate, either by virtue of being in the same domain or by using accounts that permit access to the needed domain(s). If you will be working with other products (such as migrating cases from LexisNexis® Concordance®), ensure that Eclipse SE can communicate with these products.

Ipro Tech recommends that the Eclipse SE Print Manager be installed on a workstation separate from other Eclipse SE modules. This workstation must have network access to the Eclipse SE system directory and all systems on which case image files are stored.

File system considerations

If Eclipse SE users are granted access to a case(s), but their file system permissions prevent them access to the case database folder, then the users will not able to see case data. Eclipse SE does not violate or supersede system permissions.

Eclipse SE users need the following file system permissions, which may be set before they begin working in Eclipse SE (before or after installation):

- The **system administrator** needs to have the MODIFY permission for the Eclipse SE system directory and the case database directories.
- **Case administrators** should be granted the MODIFY permission for the entire system directory and any data directories for any cases to which they are assigned.

- All **Eclipse SE users** need at a minimum, READ access to the Eclipse SE system directory. Also:

  - Users need the MODIFY permission for the EclipseSession.udb, SysUserBatch.udb, and SysUserPreferences.udb files that reside in the Eclipse SE system directory.
  - Any user assigned the Eclipse SE privileges to create tags, TIFF-on-the-Fly, import data, ingest natives, ingest images, rebuild indexes, or produce in a case will need to have the MODIFY permission for the case database directory.

See your Microsoft Windows documentation for details on file system permissions.

Getting Started

To install Eclipse SE:

1. Download the Eclipse SE installation package from the MyIpro software download location. Unzip the download package.

   MyIpro is a website for Ipro clients, where product software, documentation, training videos, and other materials can be obtained. If you do not yet have a MyIpro account, please contact Ipro Support as explained on page .

2. Continue with the installation method of choice.

Method 1. Ipro Eclipse SE Setup Wrapper Installation

To use the Ipro Eclipse SE Setup wrapper on an individual computer, complete the following steps. This procedure is for new installations; see the *Eclipse SE Upgrade Guide* for product upgrades.

1. After completing preparation, double-click Eclipse SE's **setup.exe** to install or manage Eclipse SE modules. If a User Account Control message appears, click **Yes**.

2. Wait as installation files are extracted; space requirements and prerequisites will also be checked. This may take a few minutes. If needed, the Eclipse SE prerequisites installation opens.

3. If the prerequisites installation starts:

   a. Click **Install** and then wait as the prerequisites are installed. (This may take a few minutes.)

📋	**IMPORTANT!** Microsoft .NET Framework 3.5 is one of the prerequisites. In some operating systems (such as Windows 7 and Windows Server 2008), it is automatically installed but not activated. To avoid errors in these cases, use Windows functionality (Programs and Features in the Control Panel or Server Manager, as applicable) to activate the framework before you begin to use Eclipse SE. Refer to *Ipro Eclipse SE System Requirements* and your Windows documentation for details.

   b. When the process completes, click **Next**. The **Welcome** screen appears.

4. Click **Next**. The License Agreement screen appears.

5. Read and/or print the license agreement, then select **I accept the terms in the license agreement** and click **Next**.

6. On the Custom Setup screen, choose the modules to be installed by clicking ![icon] next to the module name and choosing the needed option, as shown in the following figure.
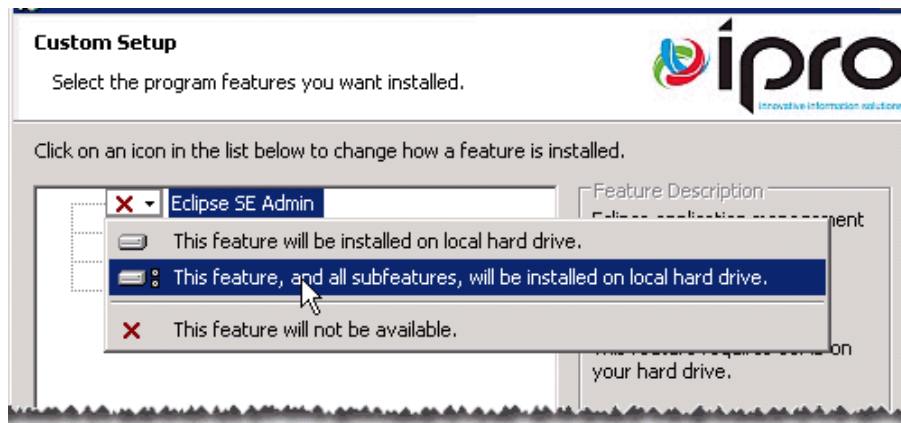
7. Optional: Customize the installation location for each module as follows:
   a. Select (highlight) the module name and click **Change**. The Change Current Destination Folder dialog box appears.
   b. Enter or navigate to the needed location, then click **OK** to close the dialog box.

8. Optional: Verify that enough space exists on the selected installation drive:
   a. Click **Space** in the Custom Setup dialog box. The Disk Space Requirements dialog box opens, providing a list of accessible drives, disk size, available space, and required space.
   b. Evaluate the information, and then click **OK** to close the dialog box.

9. Click **Next**. If you are installing Eclipse SE Administration, the Eclipse SE System Configuration dialog box appears. For other modules, skip to step 11.

10. For new installations of Eclipse SE Administration, select the **Create a new Eclipse System Database option**, then click Next.

11. Click Install. Wait as installation proceeds.

12. Complete the Configure Eclipse SE System dialog box:

   - **System Directory:** Enter or browse to a location for Eclipse SE administrative database files. Use UNC format (such as \\myserver001\Eclipse SE, not E:\Eclipse SE). This directory must be in a network location that is accessible by all Eclipse SE users.
   - **System Administrator User ID:** Enter a username for the initial Eclipse SE Super Administrator.
   - **System Administrator Password**: Enter and confirm a password for the initial Eclipse SE Super Administrator in the two password fields.

	IMPORTANT! Keep your new user credentials in a safe place.

13. Click **Save** and then **OK** in response to the success message. Installation continues.

14. If a message regarding rebooting the system appears during installation, click **OK**.

15. When the configuration is complete, the InstallShield Wizard Completed screen appears; click **Finish**. Eclipse SE icons for the installed features are added to your desktop:

16. Reboot your system before proceeding.

Method 2. Silent Installations

The executable file install can be run automatically with this command:

`X:\path\setup.exe /s /v"/qn addlocal=<module1>,<module2>,..."`

Where

- *X*: The letter of the drive on which the Eclipse SE setup.exe file resides. A network location can also
  be specified.
- *Path:*   The folder location of the Eclipse SE setup.exe file.

	NOTE: If the path includes spaces, enclose the path in quotation marks, for example: `C:\My Files\Installs\Eclipse SE\setup.exe`

- *<module1>, <module2>:* The names of the modules to be installed. Module names include:

  - `SEAdmin`
  - `SEDesktop`
  - `SEPrint`
  - `SEPublish`

For example, to install the Eclipse SE Desktop silently (with the setup.exe file in the location specified):

```
C:\Downloads\EclipseSE\setup.exe /s /v"/qn addlocal=SEDesktop"
```

Method 3. Administrative Installations

The install files can be extracted (usually to a network location) with core MSI and program files by using the `/a` option.

The MSI can be modified to disallow the installation of certain modules when run in full user-interface mode. Use an MSI editor tool such as Orca to modify the MSI – in the Features table of the MSI database, set the level of each feature you want to be unavailable to 0.

Additionally, the extracted MSI file can be run automatically using a command that is similar to the one used for silent installations:

```
IproEclipseSE.msi/passive ADDLOCAL=<module1>,<module2>,...
```

	NOTE: Eclipse SE prerequisites are not installed with this method. Run needed installations manually on each workstation. Installation files are in the ISSetupPrerequisites subdirectory.
	Regarding .NET Framework 3.5, some operating systems (such as Windows 7 and Windows Server 2008), include it, but is not activated. In these cases, use Windows functionality (Programs and Features in the Control Panel or Server Manager, as applicable) to "turn on" the framework. For details, see your Windows documentation.

Making Changes after Initial Installation

Adding/Removing Modules

After initial installation, you can install (or remove) Ipro Eclipse SE modules as needed.

To install (or remove) modules after initial installation:

1. On the workstation where changes are needed, double-click the Eclipse SE **setup.exe**. If a User Account Control message appears, click **Yes**.

	NOTE: Installation maintenance can optionally be performed through Add/Remove Programs in Windows.

2. On the Welcome screen, click **Next**. The Program Maintenance screen opens.

3. Select the **Modify** option as shown in the following figure.
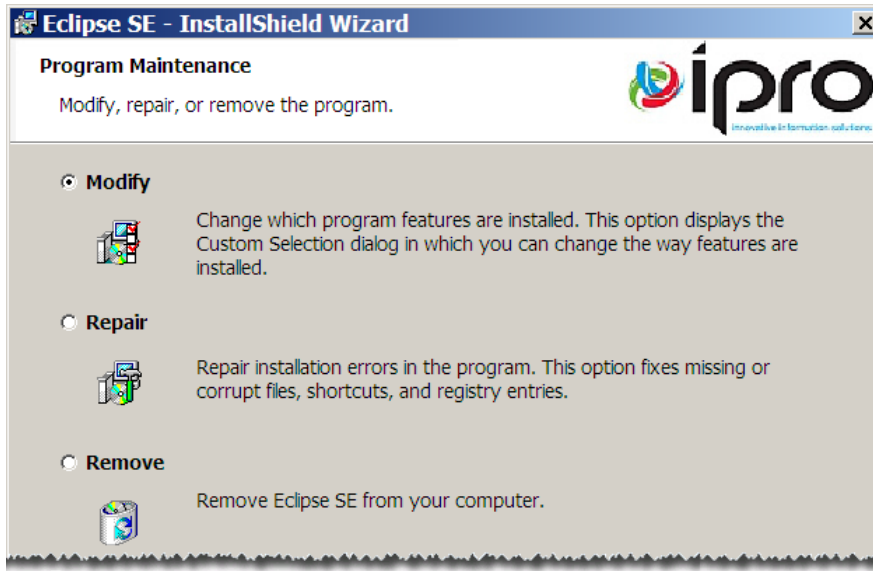
4. Click **Next**, then add or remove individual modules:

   a. In the Custom Setup dialog box, click [icon] or [icon] as needed for each module to be added/removed and select the needed option.
   b. When all selections have been made, click **Next**.

5. In the Ready to Modify Program dialog box, click **Install** (whether you are adding or removing modules).

6. Click **Finish**.

7. Wait as the changes are implemented. If a message regarding rebooting the system appears, click **OK**. If you see this message, you should reboot your system before continuing.

8. If you added new modules, you may need to re-authorize Eclipse SE as explained in "Re-authorizing Eclipse SE".

Changing the System Directory

If the Eclipse system directory is installed to the wrong location or needs to be moved, complete the following steps to correct the problem:

1. If you have just completed the initial installation and realize a mistake has been made, simply uninstall Eclipse SE and reinstall it, using the correct system directory location.

2. If you have already begun using Eclipse SE, complete the following steps:

   a. Quit all Eclipse SE components that have been installed.
   b. Copy the system directory to the needed location.

  	IMPORTANT! This directory must be in a network location that is accessible by all Eclipse SE users; see "Preparation" on page 8 for details

c. From the Windows desktop, choose **Start** > **All Programs** > **Ipro Tech** > **Eclipse SE** > **Administration**.

d. In the Eclipse SE Administration dialog box, click **Configure**.

e. Navigate to and select the new administrative system directory, then click OK.

f. Re-authorize the system, as explained in "Re-authorizing Eclipse SE".

g. Once the system is re-authorized, you can move case data directories to the new location. For more information, see the Ipro Help Center.

Authorizing the Eclipse SE System

After Eclipse SE Administration is installed, activate your licenses using one of the following methods:

Method	Description
Local authorization	Internet: If you have Internet access, simply click a button to authorize your Eclipse SE system.
	Email: If you do not have Internet access, you can easily use email to send and receive needed authorization files.
Remote authorization	If the Ipro Authorization Server is installed at your site (for example, because you are using Ipro for enterprise products[6]), use the Ipro Authorization Server to authorize Eclipse SE. To use this method, the Ipro Authorization Server must be installed and configured. See the *Ipro Authorization Installation Guide* for details. **IMPORTANT!** If you will be using the Eclipse SE Scanning, Summation Migration, and/or SE Streaming module, remote authorization *must* be used.

Authorization remains in effect according to the terms of your licensing agreement. Beginning one week before your authorization will expire, a warning will display when users log in to either Eclipse SE Desktop or Administration.
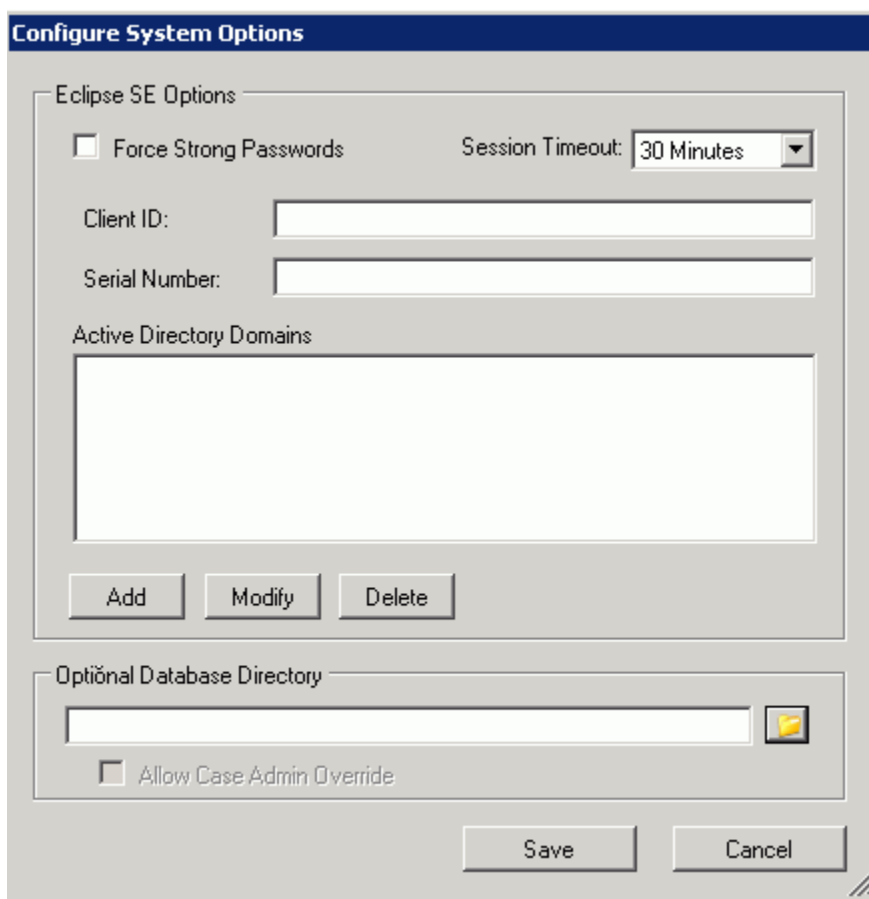
NOTE: For additional details on licensing, see "About Eclipse SE Licensing".

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[6] Ipro for enterprise platform.

Local Authorization (Internet Access)

If computers on which Eclipse SE is installed have access to the Internet, complete the following steps (for new installations).
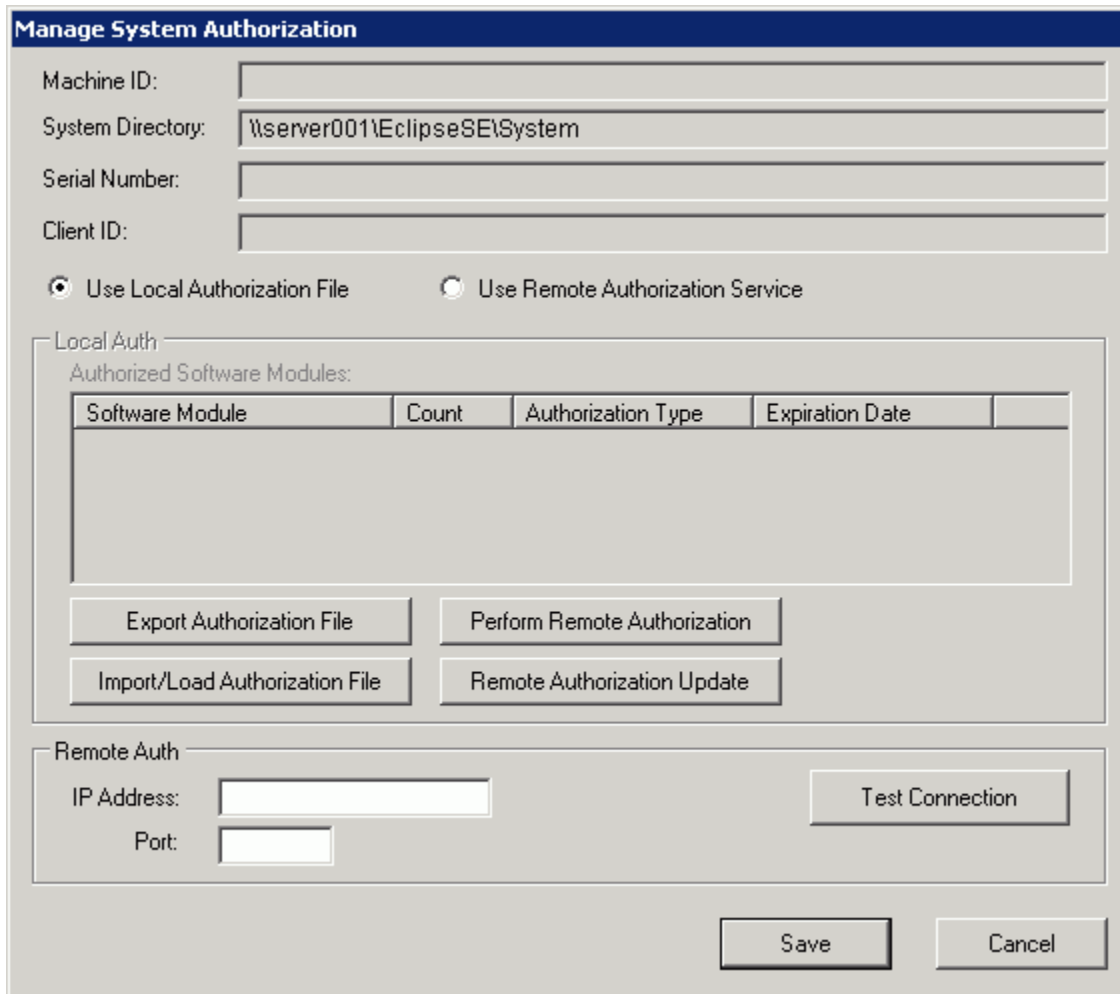
1. Identify the computer to serve as the Eclipse SE authorization computer. Eclipse SE Administration must be installed on this computer; it will be the only computer that can perform authorization for Eclipse SE products (now and in the future).

2. From the Windows Start Menu programs list, select **Ipro Tech > Eclipse SE > Eclipse SE Administration**.

3. In the Login dialog box, click **Configure**.

4. Enter or navigate to and select the location defined during installation for the Eclipse SE System Directory; click **OK**.

5. Enter the Super Administrator credentials created during installation and click **OK**.

6. The Configure System Options dialog box appears as shown in the following figure:

7. Enter the **Client ID** and **Serial Number** provided with your purchase/download package and click **Save**.

	NOTE: Other settings in the Configure System Options dialog box can be addressed after authorization is complete. For more information, see the Eclipse SE help in the Ipro Help Center.

8. Click **OK** in response to the success message.

9. In the Manage System Authorization dialog box, select the **Use Local Authorization File** option.

10. Click **Perform Remote Authorization**. An authorization request will be sent automatically through the Internet.

    Authorization will occur automatically, typically within a few minutes. When authorization is completed, the **Authorized Software Modules** section of the screen will be populated with your serial number, client ID, and the modules authorized by your license agreement, as shown in the following example. You will also receive an email from Ipro Customer Service indicating the authorization was successful.

Local Authorization (No Internet Access)

If computers on which Eclipse SE is installed do not have Internet access, complete the following steps (for new installations).

1. Identify the computer to serve as the Eclipse SE authorization computer. Eclipse SE Administration must be installed on this computer; it will the only computer that can perform authorization for Eclipse SE products (now and in the future).

2. From the Windows Start Menu programs list, select **Ipro Tech** > **Eclipse SE > Eclipse SE Administration**.

3. In the Login dialog box, click **Configure**.

4. Navigate to the location defined during installation for the Eclipse SE System Directory and click **OK**.

5. Enter the Super Administrator credentials created during installation and click **OK**. The Configure System Options dialog box appears.

6. Enter the serial number and client identification provided with your purchase/download package and click **Save**.

	NOTE: Other settings in the Configure System Options dialog box can be addressed after authorization is complete. For more information, see the Eclipse SE help in the Ipro Help Center.

7. Click **OK** in response to the success message.

8. Click the System Management tab.

9. In the navigation panel, expand the **System Management** menu and click **System Authorization**.

10. Generate an authorization data file for registration:

    a. Select the **Use Local Authorization File** option.
    b. Click **Export Authorization File**.
    c. Navigate to a location where you want to save the authorization (.DAT) file and click **Save**.
    d. Email the resulting .DAT file (unzipped) to Ipro Customer Service at CSR@iprotech.com. Enter "Eclipse SE Authorization Request" in the email Subject line.
    e. Ipro's Customer Service will authorize the .DAT file and return a registered .DAT data file.

11. Save the file received from Ipro Customer Service to a location accessible by Eclipse SE Administration.

12. Load the registered .DAT data file on your Eclipse SE Administration computer as follows:

    a. In Eclipse SE Administration, click the **System Management** tab.
    b. In the navigation panel, expand the **System Management** menu and click **System Authorization**.
    c. Ensure the **Use Local Authorization File** option is selected.
    d. Click **Import/Load Authorization File**.
    e. Navigate to and select the registered data file, then click **Open**. At this point, the system is authorized.

Remote Authorization (Ipro Authorization Server)

If the Ipro Authorization Server is installed at your site (because you are using Ipro for enterprise products or you have purchased the optional Scanning, Summation Migration, and/or SE Streaming module for Eclipse SE), complete the following steps to use this server to authorize Eclipse SE (for new installations).

1. Gather the following Ipro Authorization Server details:

   • IP Address
   • Port number

2. From the Windows Start Menu programs list, select **Ipro Tech** > **Eclipse SE > Eclipse SE Administration**.

3. In the Login dialog box, click **Configure**.

4. Navigate to the location defined during installation for the Eclipse SE System Directory and click **OK**.

5. Enter the Super Administrator credentials created during installation and click **OK**. The Configure System Options dialog box appears.

6. Enter the serial number and client identification provided with your purchase/download package and click **Save**.

	NOTE: Other settings in the Configure System Options dialog box can be addressed after authorization is complete. For more information, see the Eclipse SE help in the Ipro Help Center.

7. Click **OK** in response to the success message.

8. Click the System Management tab.

9. In the navigation panel, expand the **System Management** menu and click **System Authorization**.

10. Select the **Use Remote Authorization Service** option.

11. In the **Remote Auth** area, enter the Authorization Server's **IP Address** and **Port** number.

12. Click **Test Connection**. Authorization is completed when a Success message appears, listing authorized Eclipse SE modules.

13. In response to the Success message, click **OK**.

Re-authorizing Eclipse SE

Local re-authorization

If you have used local authorization (remote or file-based), you may need to re-authorize Eclipse SE, for example if you move the system directory or purchase additional licenses. In cases such as these, complete the following steps. Refer to the previous procedures for details.

1. On the authorization computer, start Eclipse SE Administration and log in as a Super Administrator. Complete the following steps as needed.

2. If Internet access is available:

   a. In Eclipse SE Administration, click the **System Management** tab.
   b. In the navigation panel, expand the **System Management** menu and click **System Authorization**.
   c. Click **Remote Authorization Update**. Authorization will occur automatically, typically within a few minutes. When authorization is completed, the Manage System Authorization dialog box details will be updated to reflect new information. You will also receive an email from Ipro Customer Service indicating the authorization update was successful.

3. If Internet access is not available, repeat the steps outlined in "Local Authorization (No Internet Access)".

Remote re-authorization

Complete the following steps when re-authorization is needed for Eclipse SE (such as when additional licenses are purchased), and the Authorization Server is being used to manage your Eclipse SE licenses:

1. On the Authorization Server, navigate to the Ipro Auth Server directory.

2. Double-click **IproAuthManager.exe**. The Ipro Authorization Service Manager starts.

3. Select **Authorization Management** > **Remote Management** > **Update**.
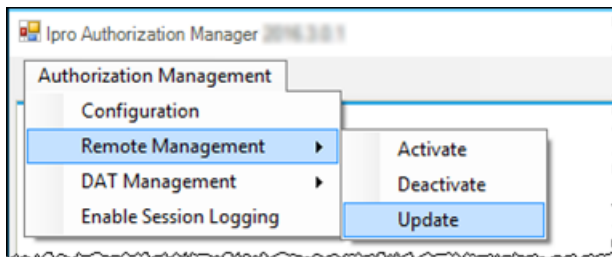
4. Follow the screen prompts. Eclipse SE authorization will be updated and an email notice will be sent regarding authorization status.

Configuring Ipro Eclipse SE

After installing Eclipse SE, configure the following system-wide settings as needed. For more information, see the Eclipse SE help in the Ipro Help Center. Activities include:

*   Specify active directories for use in configuring Eclipse SE users.
*   Set a requirement for strong passwords.
*   Set a session timeout period. (The default period is 30 minutes.)
*   Configure the Ipro Print Manager, if it has been installed.

Next Steps

Once installation and basic configuration are completed, it is the Eclipse SE administrator's responsibility to configure all aspects of the product in Eclipse SE Administration. Tasks include defining Eclipse SE users, creating cases, importing data, and more. For more information, see the Eclipse SE help in the Ipro Help Center.

When initial administration is completed and cases are ready to be reviewed, users will review documents. For more information, see the Eclipse SE help in the Ipro Help Center.

Eclipse SE documents are provided on MyIpro, a website for Ipro clients containing product software, documentation, training videos, and other materials. If you do not yet have a MyIpro account, please contact Ipro Support.

Appendix A: Installed Product Details

Overview

Files and their default locations are listed in the following table. Note: The default common program files location (Program Files\Common Files) is specified; if you have a different common program files area, applicable Ipro Eclipse SE files will be installed there.

Installed Files and Locations

The default locations for Eclipse SE application and supporting files are:

- **Eclipse SE application files**: installed in the workstation's Program Files (x86)[7]\Ipro Tech\Eclipse SE folder in the following subfolders:

  - Admin
  - Desktop
  - EclipsePrint
  - Publish

- **Supporting files/functions**: installed in the workstation's Program Files (x86)[5]\Common Files\Ipro Tech folder, in the following subfolders:

  - Datalogics-10.0
  - LEAD-15
  - MGspell
  - NativeView-8.4.1
  - RLP-6.5
  - Stellent-8.5.3[8]

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[7]   Or Program Files folder, depending on your operating system.

[8]   Oracle® acquired Stellent in 2006 and Stellent was renamed "Oracle Outside-In Technology." The terms are interchangeable, thus the folder name has not been changed.