Upgrade Guide

Eclipse SE® by Ipro 2019.0.0

Q4 2019

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Introduction

About this Guide

This guide walks you through the Ipro Eclipse SE™ product upgrade. In this document, a "feature"[1] describes an individual functional area in Ipro Eclipse SE, including:

- **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 (apply tags, redact content, etc.).
- **Eclipse SE Print Manager:** This optional feature allows users to send print jobs to a central print manager, thus freeing up personal computer resources.
- **Ipro Publish:** Ipro Publish allows you to create a standalone version of an Eclipse SE case from an Eclipse SE case or load files from Eclipse or other sources. This standalone version can be used by reviewers outside of your Eclipse SE environment.

	NOTE: If you have purchased any of the following optional modules, they will be installed/upgraded in conjunction with the upgrade of Eclipse SE Desktop and/or Administration (as applicable): - Scanning module[2]: Enables scanning from the Eclipse SE Desktop. - Summation Migration module[3]: Allows AccessData® Summation® cases to be migrated directly into Eclipse SE via Eclipse SE Administration; see the following paragraph. - SE Streaming module[4]: Provides faster native file ingestion in Eclipse SE Administration; also includes deduplication and other native file ingestion features.

Authorization Considerations

- If you are installing the Eclipse SE Scanning, Summation Migration, and/or SE Streaming module for the first time, note that they must be authorized through the Ipro Authorization Server (not through local authorization).
- If you are implementing the Authorization Server for the first time, see the *Ipro Authorization Server Installation Guide* and the *Ipro Eclipse SE Installation Guide*.
- To update authorization, *see* "Remote Authorization".

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[1]   The terms "component" and "module" may also be used in this document.

[2]   Available in Eclipse SE 2015.0.0 and later.

[3]   Available in Eclipse SE 2016.3.1 and later.

[4]   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 2019.0.0")
- 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 2019.0.0 /ABC Co. – Install/database issue

Upgrading Ipro Eclipse SE

Preparation

⚠️	**IMPORTANT!** It is *essential* that you complete the following procedures before upgrading Ipro Eclipse SE. Each procedure is discussed in the following paragraphs. • Obtain current settings. • Determine your upgrade method. • Back up all data. • Ensure that **all** users are logged out of Ipro Eclipse SE. • Obtain installation package.

Obtaining Current Settings

Before starting the upgrade, ensure that you have your Eclipse SE configuration details, including **System Directory**, **Eclipse SE Admin UserID/Password** (Super Administrator credentials), and other settings.

Identifying Super Administrator Credentials

Only a Super Administrator can upgrade Eclipse SE. Make sure you have needed Super Administrator credentials before you start the upgrade.

Determining Upgrade Method

It is possible to upgrade Ipro Eclipse SE using the method used for initial installation:

• Setup Wrapper
• Silent Upgrade
• Administrative Upgrade

This guide describes the use of the Setup Wrapper. For other methods, follow the same procedures as the initial installation. Refer to the *Ipro Eclipse SE Installation Guide* as needed.

📋	**NOTE**: Depending on the release from which you are upgrading, Eclipse SE prerequisites may need to be upgraded. The upgrade is automatic when you use the Setup Wrapper or a silent installation, but the prerequisites will typically not be upgraded automatically for an administrative installation. In this case, run the software packages manually on each workstation. The packages are located in the ISSetupPrerequisites folder provided with the upgrade package.

Backing up data

It is important to create a backup of all existing data prior to beginning the upgrade process. Data on any previous releases can be restored if you run into a problem. For more information, see the Eclipse SE help on the Ipro Help Center.

Checking for active users

⚠️	**CAUTION**: Make sure that all users have logged out of all Ipro Eclipse SE applications before beginning the upgrade. You can verify that all users are out of the system by completing the following procedure.

To verify that all users are out of the system:

1. Start Eclipse SE Administration and log in as a Super Administrator.
2. Click the **System Management** tab.
3. In the navigation panel, expand the **System Management** menu and click **Manage User Sessions**.
4. Alert users to log out of the system (now or at a specified time).
5. Review connection details for users remaining in the system:

   - **Software Module:** The module that is open by the session. For example, ECLIPSE_VIEWER represents the Eclipse SE Desktop.
   - **Session ID:** Open session number.
   - **User:** The user who is currently accessing the system.
   - **Case:** The case in which the user is currently working.
   - **Last Accessed:** The last time the module was accessed.

   The following figure shows typical details.

Manage User Sessions				
Software Module	Session ID	User	Case	Last Accessed
ECLIPSE_VIEWER	20140425091536-324	superjdub	Myco-EEOC	2014/04/25 10:01
ECLIPSE_VIEWER	20140425091619-325	annie	Myco-EEOC	2014/04/25 10:02
ECLIPSE_VIEWER	20140425094247-326	wiggleworth	Smith v. Jones	2014/04/25 09:57
ECLIPSE_VIEWER	20140425095802-328	gene	Myco-EEOC	2014/04/25 09:58

6. Contact active users and instruct them a) to log off and b) *not* to log on until they are notified that all upgrade procedures have been completed.
7. When all connections have been addressed, click **Done**.
8. After the upgrade is complete, notify users that they can resume work.

Obtaining latest installation package

Download the Eclipse SE installation package from the MyIpro software download location. Unzip the package to a convenient location.

For help using Eclipse SE, see the Ipro Help Center.

Upgrade Procedure (Setup Wrapper)

Complete the following steps to upgrade or install Eclipse SE components at your site:

	NOTE: if your upgrade includes installing the Eclipse SE Print Manager for the first time, it is recommended that it be installed on a workstation that is separate from other Eclipse SE modules.

1. Complete "Preparation".
2. Locate and double-click Eclipse SE's **setup.exe**.
3. Follow all Install Wizard prompts to complete the upgrade.
4. Repeat this procedure for all workstations with licensed installations of Ipro Eclipse SE modules.
5. See "Case Update Details," next, to complete the upgrade.
6. If you are upgrading from a version prior to Eclipse SE 2014.0.0 or if you are installing the Eclipse SE Scanning, Summation Migration, and/or SE Streaming module for the first time, you must update product authorizations as explained in Updating Ipro Authorization.

Case Update Details

Deduplication criteria

If you will be using the SE Streaming for native file ingestion and you want to perform deduplication, note that deduplication works for documents added to a case in Eclipse SE 2016.3.2 or later. Documents added to the case prior to this release are not included in the deduplication database and thus will not be compared.

Upgrading from version 2014.1.0 – 2017.3.6

No special tasks are required when you upgrade to 2017.4.0 from any version of Eclipse SE between 2014.1.0 and version 2016.3.6.

	NOTE: When you upgrade from a version prior to 2015.1.0, the PAGECNT field is renamed to "IMAGECNT." This change is automatic; no action is required by the user.

Upgrading from versions 2014.0.1 and earlier

Beginning with version 2014.1.0, the MD5_HASH and IMAGECNT (see note above) fields will be defined

as sortable (by default) when cases are created. In addition, changes have been made to the way in which data is displayed in the **Tally** tab when a multi-value field is tallied. (Each value will display on a separate line.)

To implement these changes in existing cases, rebuild case indexes. For more information, see the Eclipse SE help on the Ipro Help Center.

Upgrading from version 2013.1.0

If you are upgrading from an Eclipse SE version 2013.1.0, you must manage file paths and system fields. For more information, see the Eclipse SE help on the Ipro Help Center.

Upgrading from versions prior to 2013.1.0

If you are upgrading from an Eclipse SE version prior to 2013.1.0, you must complete add new system fields to your cases. For more information, see the Eclipse SE help on the Ipro Help Center.

New fields include:

- FILE_ID
- NATIVE_ SIZE
- TEXT_SIZE

In addition, if a FILETYPE field exists in your case, it will be changed to the FILE_EXT file type and populated with the file extensions detected by Eclipse SE during the validation process.

Updating Ipro Authorization

Re-authorization is required if you are upgrading from Eclipse SE releases prior to 2013.1.0, are installing the Eclipse SE Scanning, Summation Migration, or SE Streaming module for the first time, and in certain other situations.

Complete one of the following procedures to re-authorize Eclipse SE:

- Local authorization:

  - Internet-based
  - Email-based

- Remote authorization: if the Ipro Authorization Server is installed at your site (because you are using Ipro for enterprise products or have the Scanning, Summation Migration, or SE Streaming module), use the Authorization Server to authorize Eclipse SE.

Local Authorization

To authorize Eclipse SE:

1. After upgrading Eclipse SE modules, start Eclipse SE Administration on the authorization computer (the computer on which authorization originally occurred).
2. Log in as a Super Administrator.
3. Click the **System Management** tab.
4. In the navigation panel, expand the **System Management** menu and click **System Authorization**.

   All previous authorization settings will be read by the authorization component of Eclipse SE Administration and listed in this dialog box.

5. Complete the below steps to re-authorize Eclipse SE.

   If Internet access is available:

   a. 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.
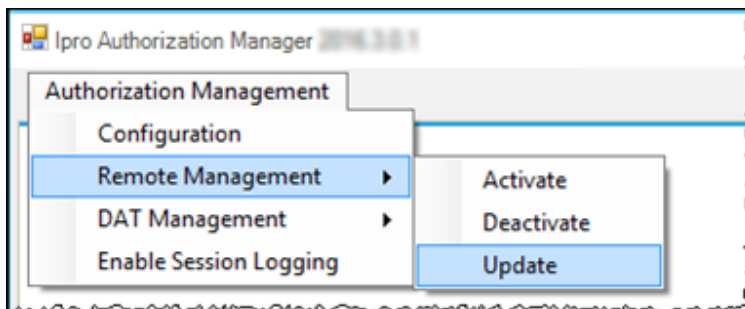   b. Click **Done**.

If Internet access is *not* available:

a. Click Export Authorization File.
b. Navigate to a location where you want to save the authorization (.DAT) file and click **Save**.
c. E-mail the resulting .DAT file (unzipped) to Ipro Customer Service at CSR@iprotech.com. Enter "Eclipse SE Authorization Request" in the e-mail Subject line. Ipro's Customer Service will authorize the .DAT file and return a registered .DAT data file.
d. Save the file received from Ipro Customer Service to a location accessible by Eclipse SE Administration.
e. On the System Management ribbon, click **System Authorization**.
f. In the Manage System Authorization dialog box, click **Import/Load Authorization File**.
g. Navigate to and select the registered data file, then click **Open**. At this point, the system is authorized.
h. Click **Done**.

Remote Authorization

Complete the following steps when re-authorization is needed for Eclipse SE, 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** as shown here.

4. Follow the screen prompts. Eclipse SE authorization will be updated and an email notice will be sent regarding authorization status.

Authorization remains in effect according to the terms of your licensing agreement. Beginning one week before authorization will expire, a warning will display when users log in to either Eclipse SE Desktop or Administration.