



ZyLAB Information Management Platform 6.7 Installation & Upgrade Guide

Version: Information Management Platform 6.7

Version date: April 5th, 2019





Contact Us

For full contact details, visit the ZyLAB website - <https://www.zylab.com>

For support, submit a ticket on - <https://help.zylab.com>



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About Information Management

Platform Installation

The ZyLAB Information Management Platform provides clients with an affordable and scalable framework from which they can quickly capture, search, retrieve and assess the information stored in disparate formats and locations.

Modules of the Information Management Platform

The Information Management Platform consists of several modules:

- ZyINDEX
- ZyFIND
- ZyALERT

In addition, the Scanning Bundle can be installed.

If you want to use the ZyLAB (Enterprise) Webserver, Microsoft® Internet Services Manager (version 7 or higher) must be installed.



System Requirements

Minimum system requirements

Workstation:

1024x768 screen resolution

Intel® I5 3 GHz, 2048 MB memory

Hard disk requires at least 2GB free space (for installing the application).

Server:

Dual-Core Intel® Xeon, 2 GHz, 2048 MB memory per Core

Recommended system requirements

Workstation:

1920x1080 screen resolution

Intel® I7 or similar, >3 GHz, 2048 MB memory per core

Server:

Dual Socket, Dual-Core Intel® Xeon >2 GHz, 4096 MB memory per core

Supported OS versions

Workstation:

Windows 8.1 Enterprise

Windows 10

Server:

Windows Server 2012 R2

Windows Server 2016

Supported Browser versions

Internet Explorer 11

Firefox 66 or higher



Supported Databases (Database fields module)

Microsoft SQL Server 2016 / Microsoft SQL Server 2017

Oracle 10, 11

MySQL 5.6

Supported Office versions (ZyLAB Archiving Services for Office)

Office 2007 32 bit

Office 2010 32 bit

Office 2013 32 bit

Supported Lotus Notes versions (ZyLAB Archiving Services for Lotus Notes)

Lotus Notes 8.5.1

Supported GroupWise versions (ZyLAB Archiving Services for GroupWise)

GroupWise 8.0.0

Additional requirements

Component

Required by

Microsoft .NET 4.0	ZyLAB Archiving Services
Microsoft .NET 4.5.2	All Information Management Platform .NET components
Microsoft Message Queuing (MSMQ)	Services Monitor NT Service
File and Printer Sharing exception in Windows Firewall for remote access	Services Monitor Manager
Internet Information Server 6 or higher	Services Monitor Manager Enterprise Webserver
GroupWise Windows Client 8.0.0	ZyLAB Archiving Services for GroupWise



Ports used by the Information Management Platform

Default Port	Type	Used by
46100	HTTP	Services Monitor NT Service
46101	TCP	Services Monitor NT Service
46102	TCP	Services Monitor NT Service
46120	HTTP	ZyLAB Print Service
4112	TCP	Information Management Platform Service (Indexing Service)
4112	TCP	Information Management Platform Service (Content Access Service)
4115	TCP	ZyLAB Platform SDK Service (used by Legal Review)
4117	TCP	ZyLAB Cluster Management Service (Clustered Indexing Service)
4117	TCP	ZyLAB Cluster Management Service (Clustered Content Access Service)
4117	TCP	ZyLAB Cluster Management Service (Platform SDK Service)
4119	UDP	ZyLAB Cluster Management Service (Logging)



Prerequisites

- Make sure Microsoft.Net framework v4.5 or higher is installed.
- Internet Information Services (IIS) is present.
- License file is present.
- Please read the Release Notes first.



Clean Install Information Management Platform

The installation file you received contains your ZyLAB Information Management Platform 6.7 software. In addition, you received ZyLAB license keys to work with the software.

Conditions

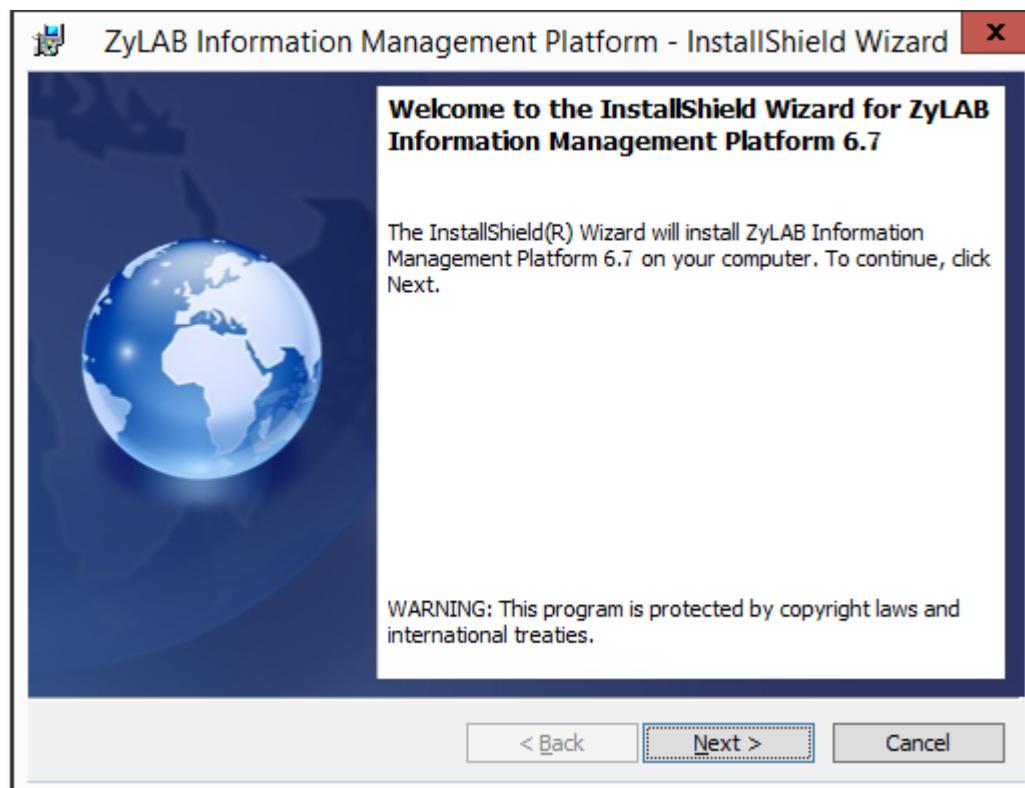
You are installing the ZyLAB Information Management Platform for the first time or you have uninstalled an older version of the ZyLAB Information Management Platform. If you have uninstalled, please make sure to remove the ZyLAB folders too (in Program Files and/or Program Files (x86)).

Instructions

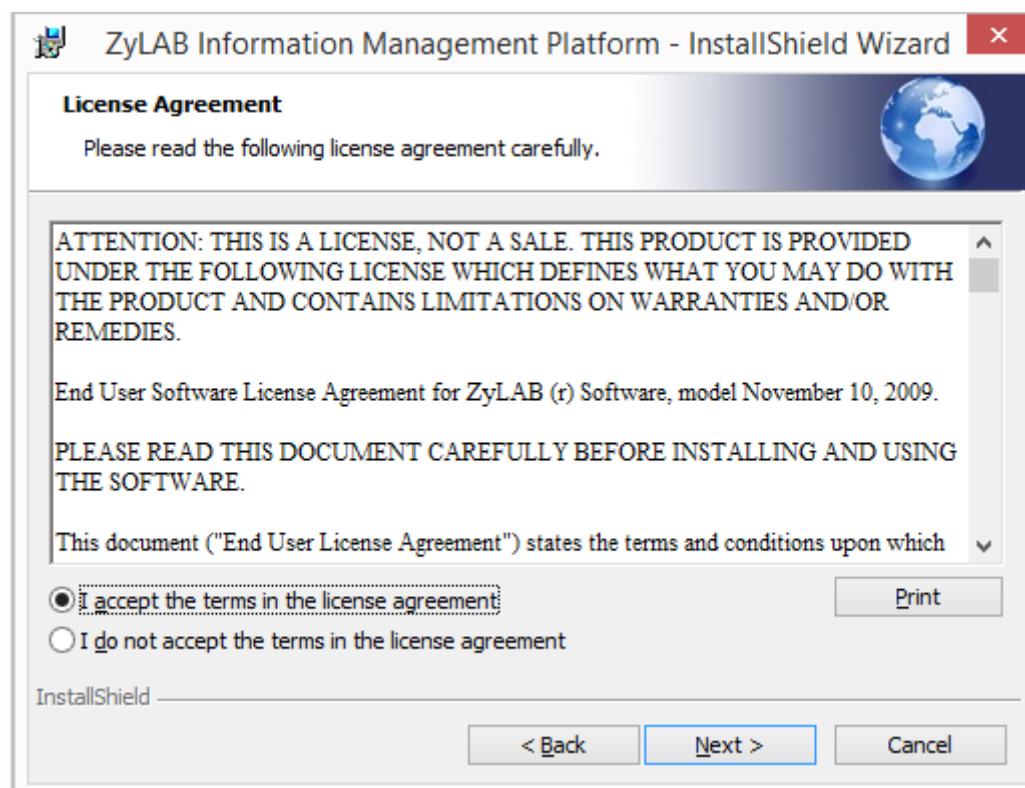
1. In Windows Explorer browse to the Disk1 folder and double-click the ZyLAB Information Management Platform.msi icon.



2. The Welcome screen appears.

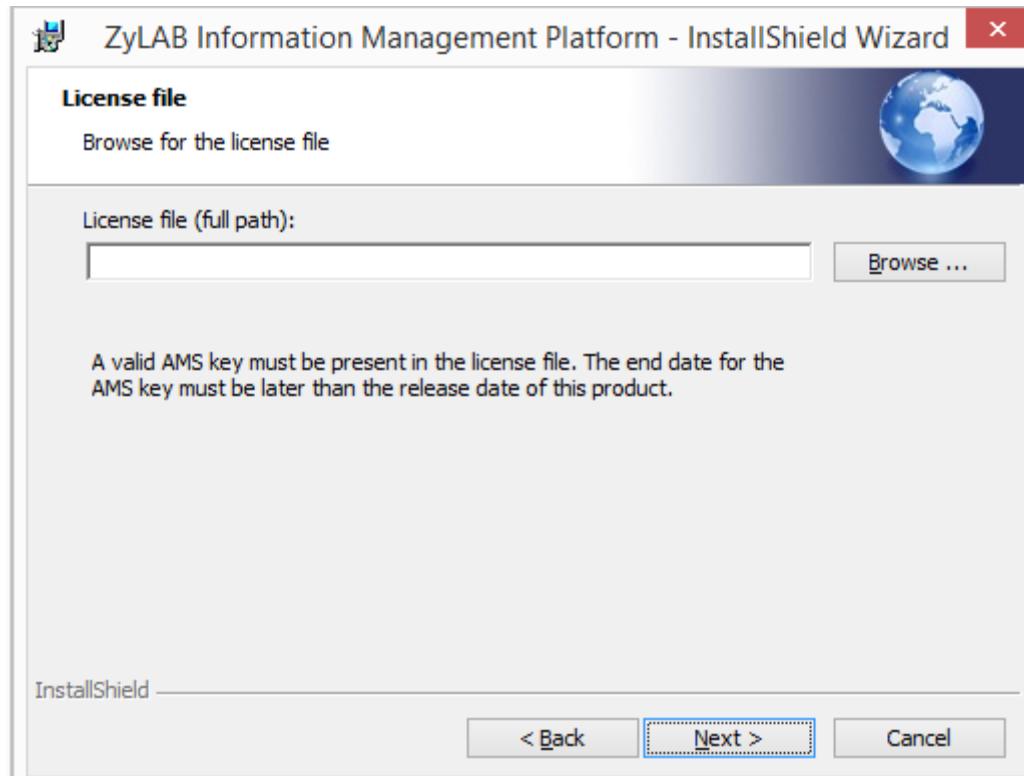


3. Click *Next*.

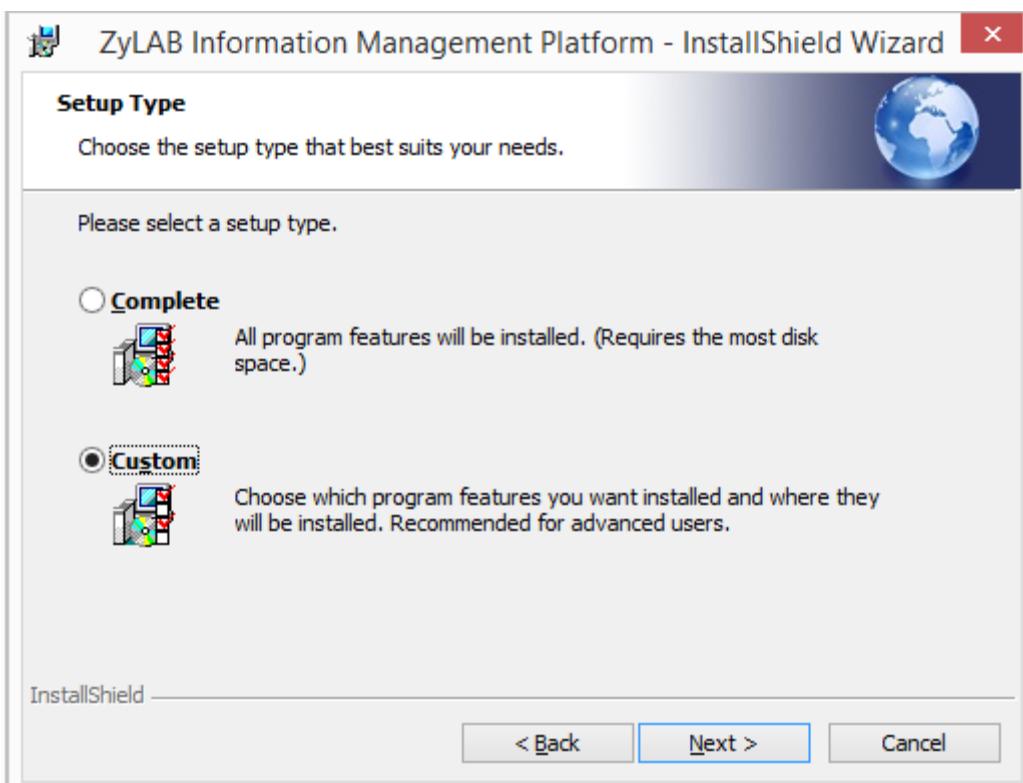




4. Read the license agreement.
To print the license agreement, click *Print*.
5. Select 'I accept the terms in the license agreement'.
6. Click *Next*.

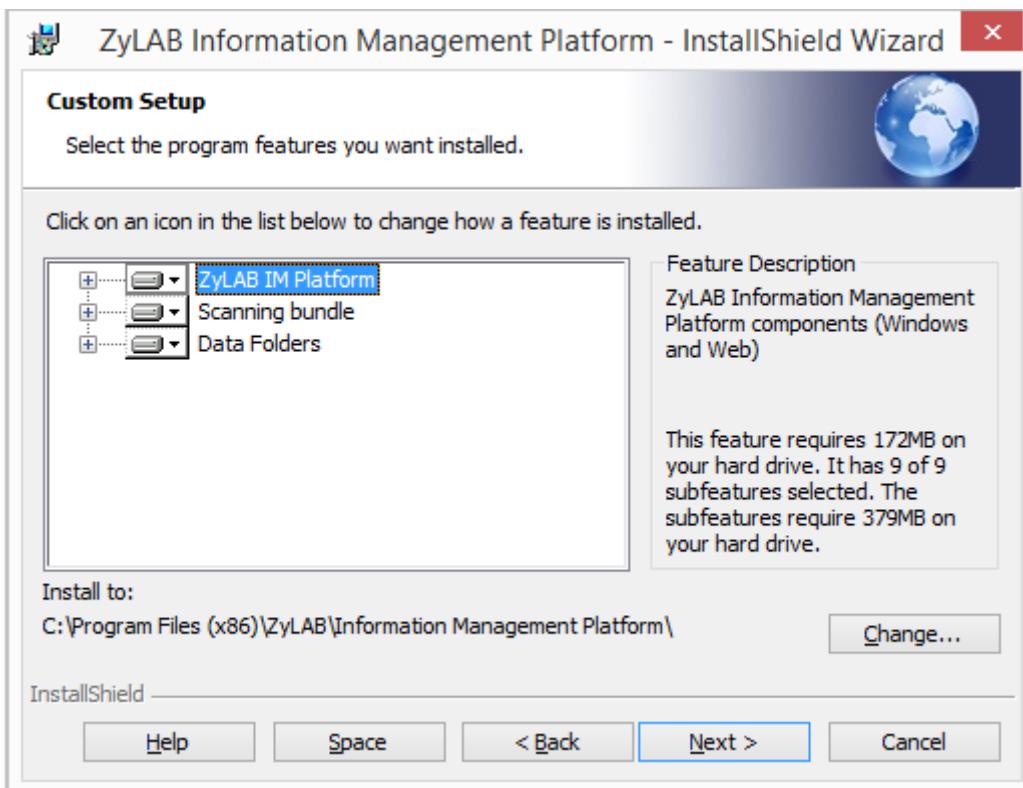


7. Browse for the License file.
8. Click *Next*.



9. Select a setup type: Complete or Custom.

10. Click *Next*.

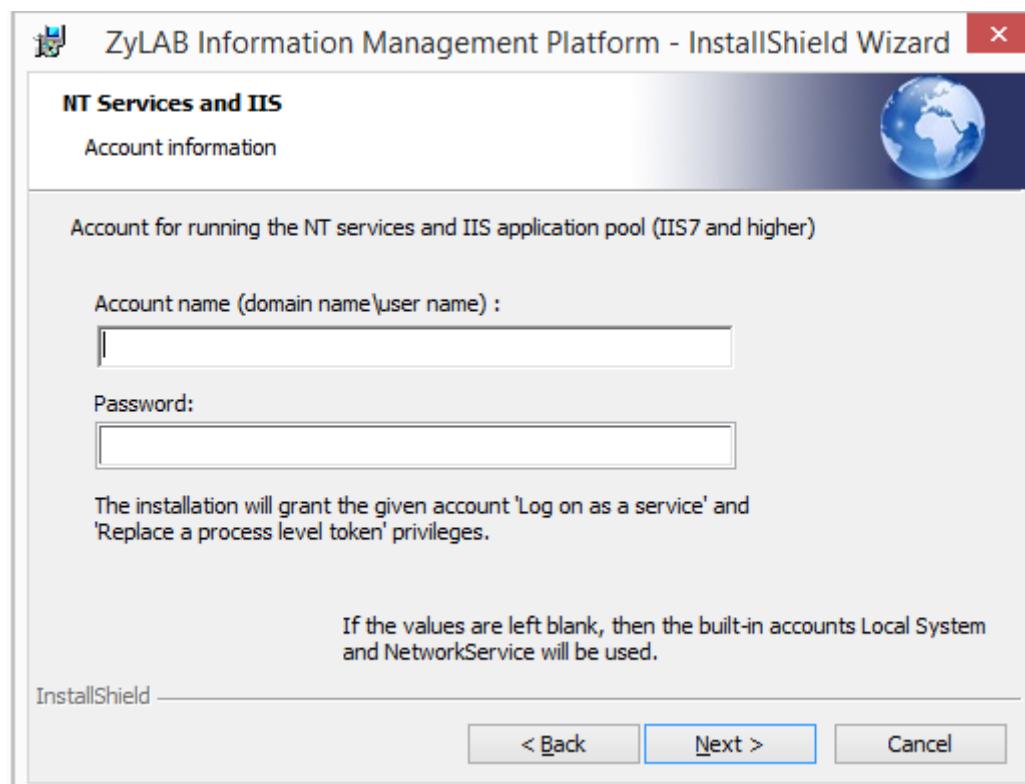




11. If you selected Custom setup, you can choose which features of the ZyLAB Information Management Platform you want to install.

- Click the Space button to check the available and required disk space.
- Click the Change... button to choose another (shared) location for a selected feature. You can use UNC paths.
- Click the Help button to learn more about the different installation options.

12. Click *Next* to continue.

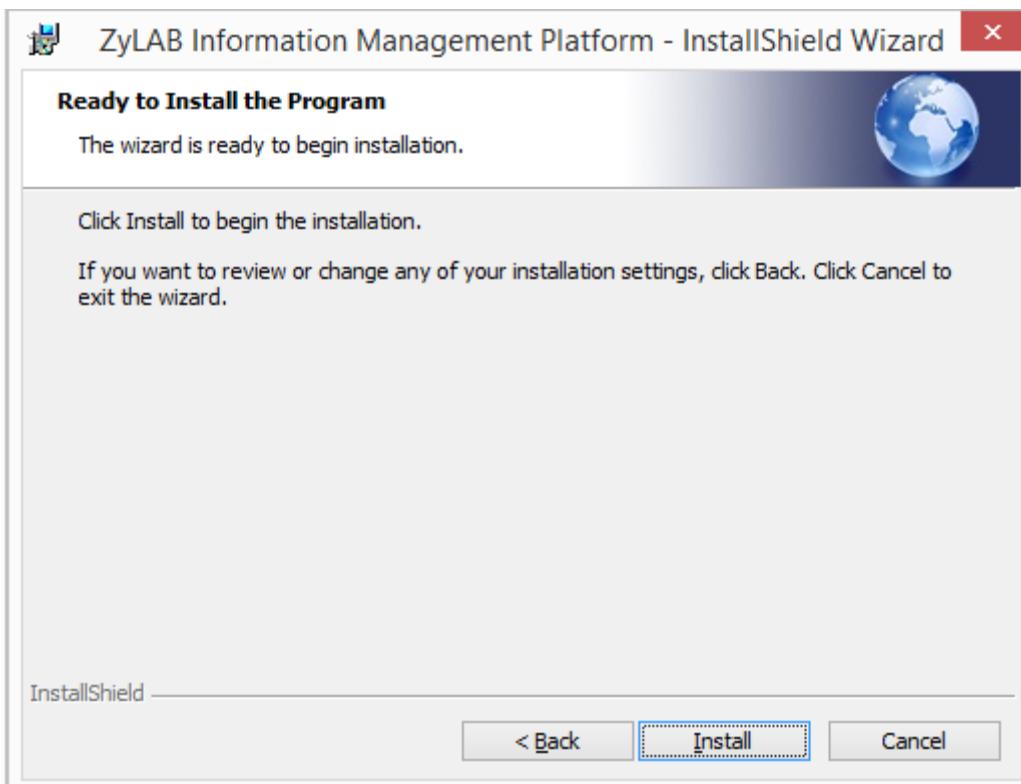


- Define the Account name and password.

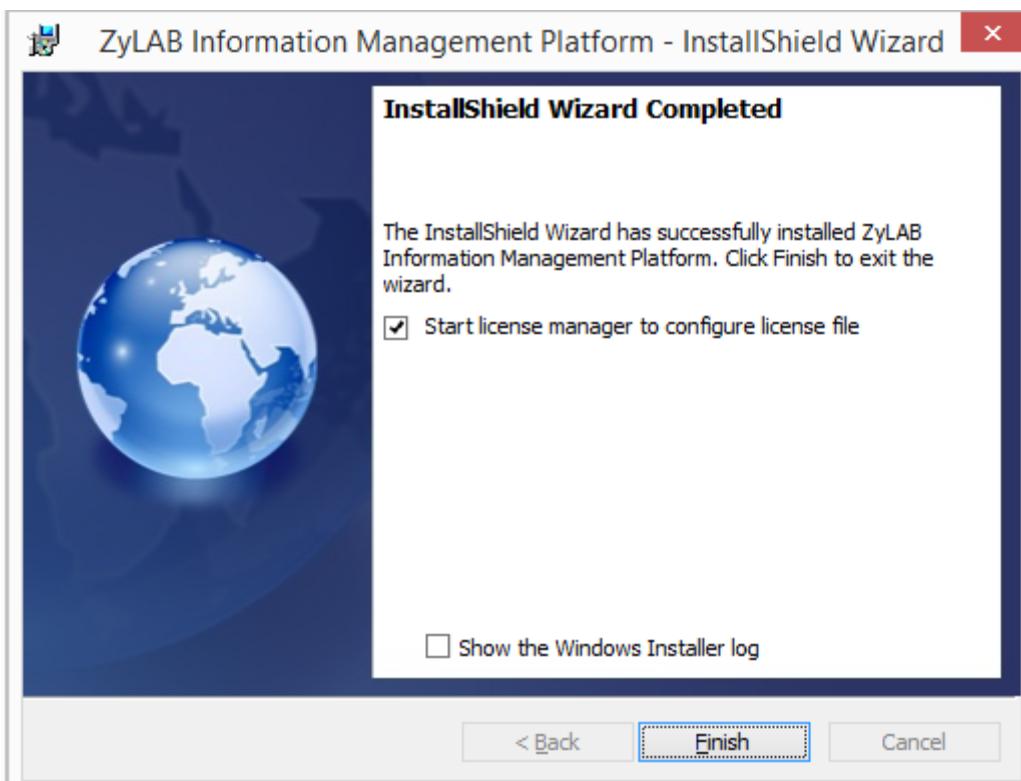
This Service Account is used to run all services and application pools. It will receive the required rights during installation, e.g. 'replace a process level token' for IIS application pools accounts and 'Log on as a service' for service accounts. An MSMQ will be created for the ZyLAB Service Monitor with the required rights set on it.

The account information is optional. If left empty, the Local System account and NetworkService account will be used.

13. Click *Next* to continue.



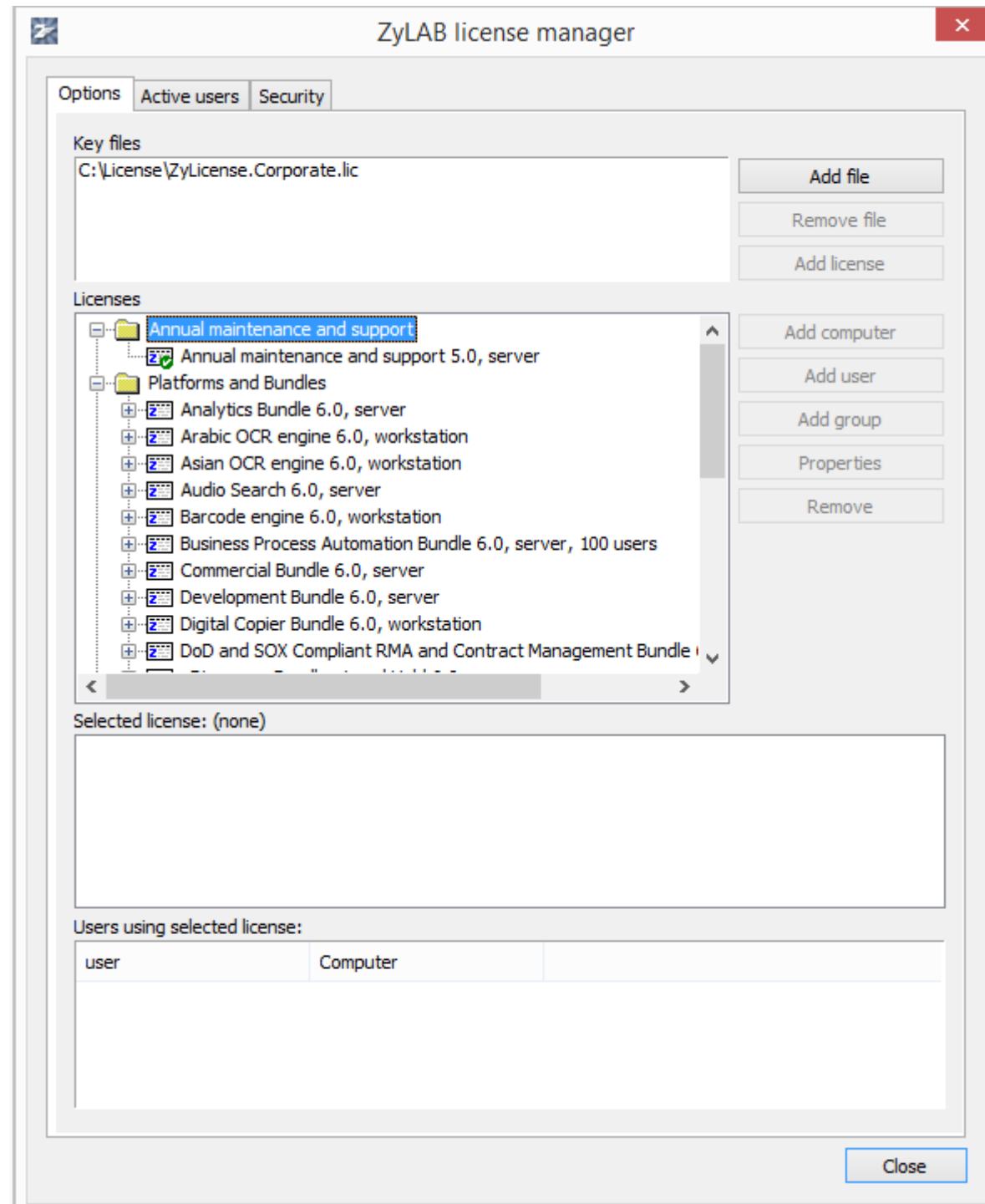
14. Click *Install*.



15. Click *Finish*.



The ZyLAB License Manager controls the use of additional modules and named user licenses (known as Client Access Licenses (CAL)).



16. Click *Add file*.



17. Add the license file(s).
18. For each Windows Workstation/Server, enter the computer name:
 - ◆ Open the Workstation key.
 - ◆ Select MYCOMPUTER.
 - ◆ Click Properties.
 - ◆ Enter the computer name.
 - ◆ Click OK.
19. Click *Close*.

You can find the License Manager for later use via Start > All Programs > ZyLAB IM Platform > Configuration > License Manager.



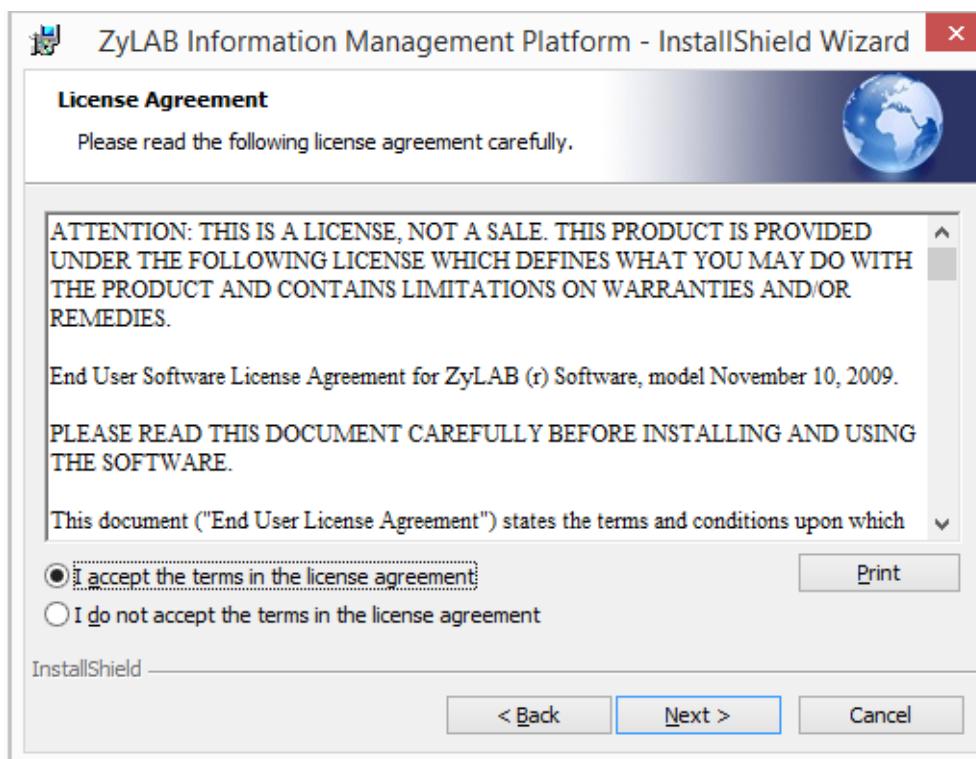
Upgrade from 6.6 to 6.7

Conditions

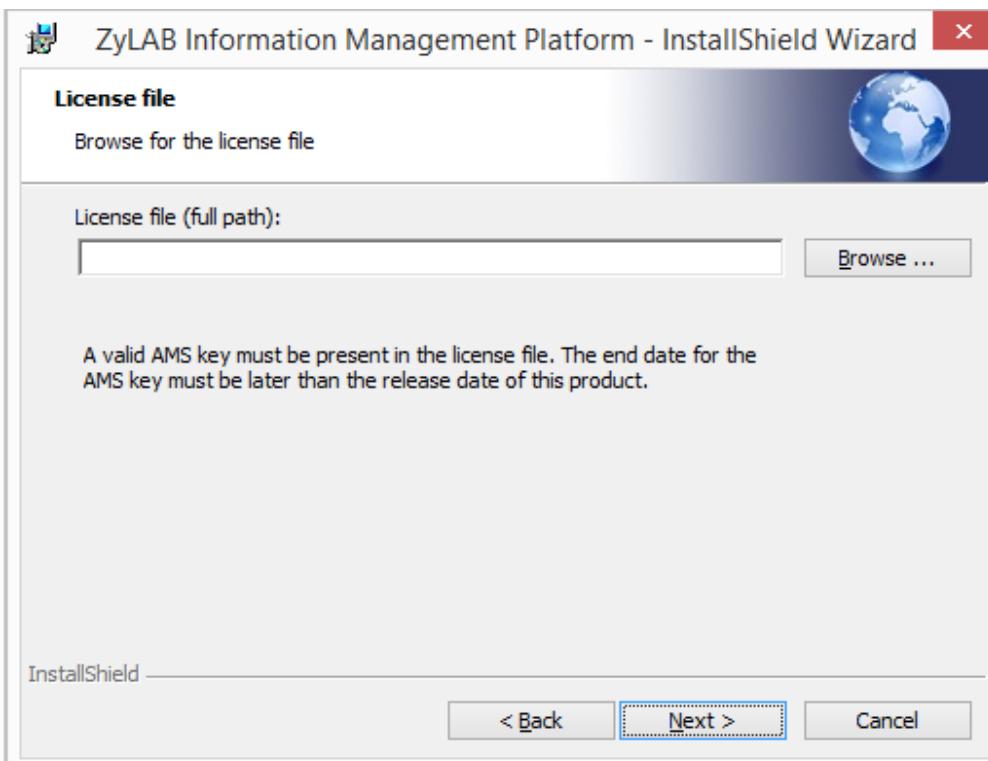
You want to upgrade from version 6.6 to version 6.7 of the ZyLAB Information Management Platform Installation.

Instructions

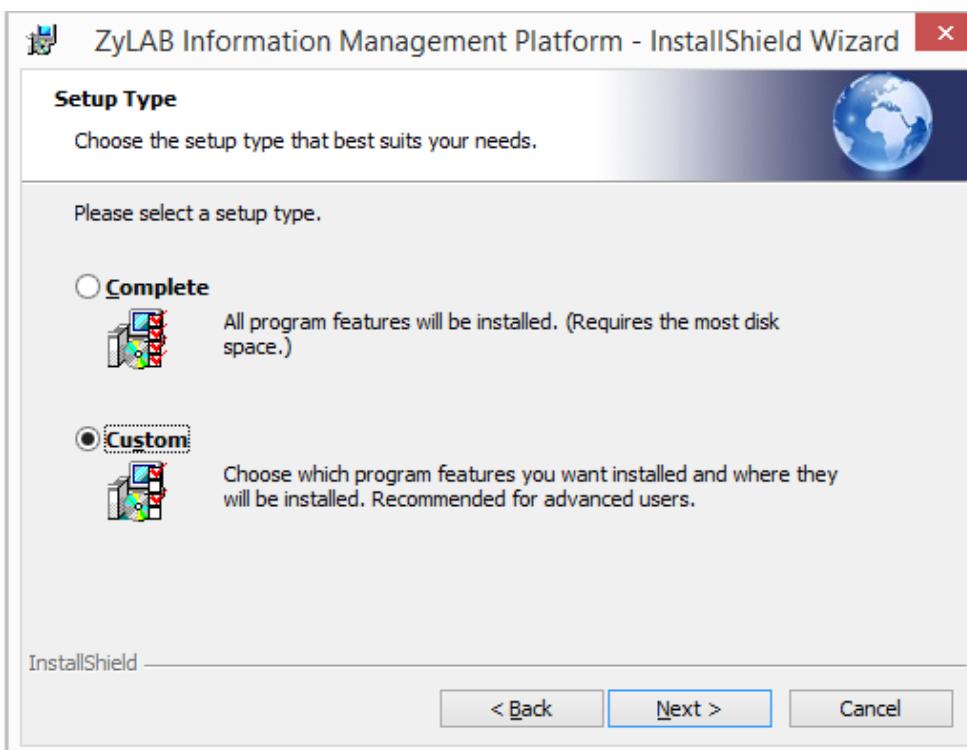
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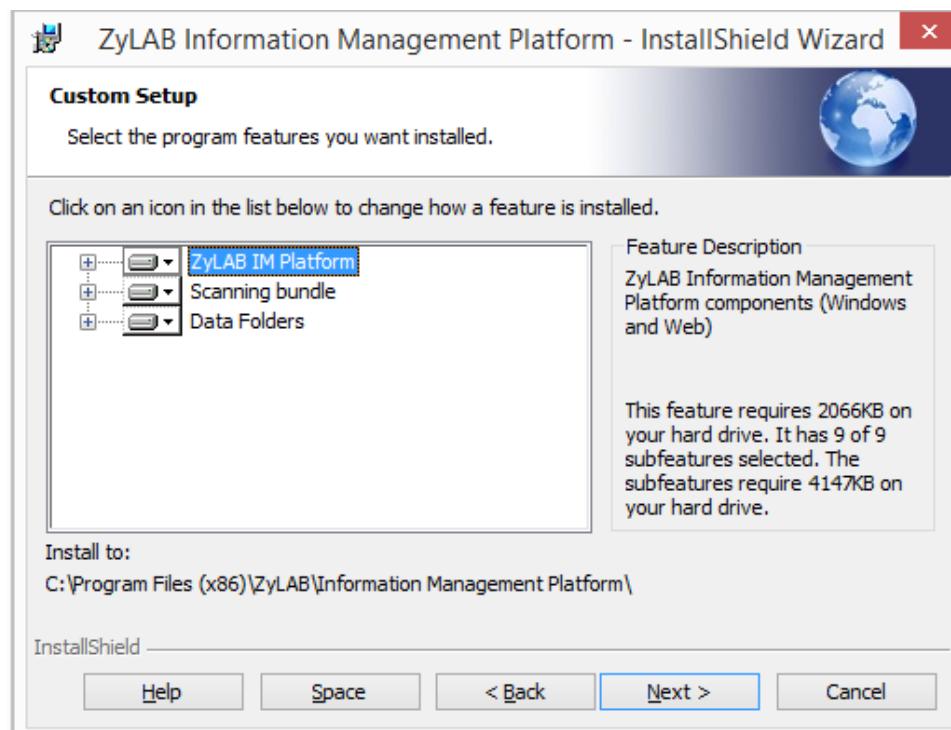
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8. Click *Next*.



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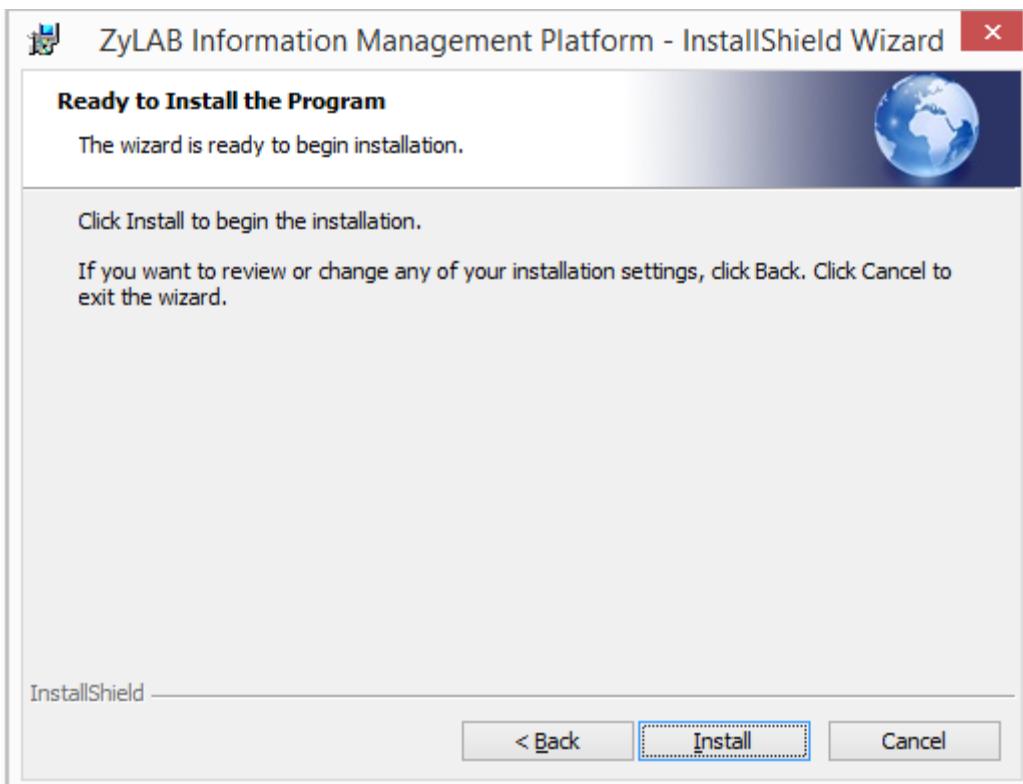
10. Click *Next*.



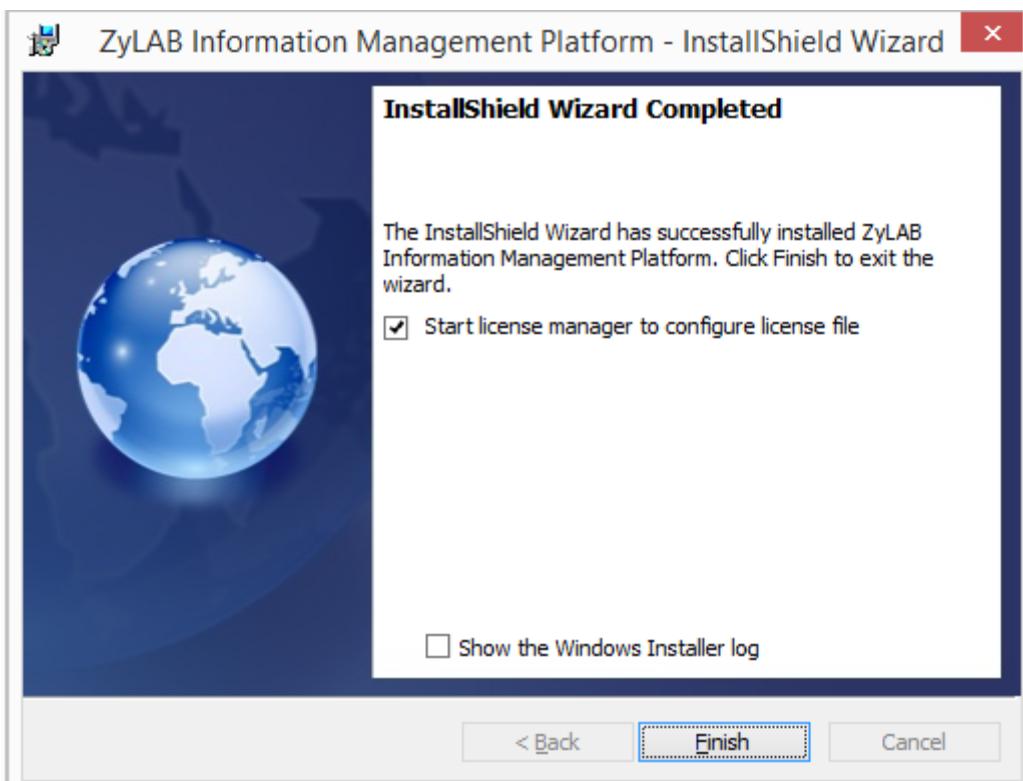
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- Click the Change... button to choose another (shared) location for a selected feature. You can use UNC paths.
- Click the Help button to learn more about the different installation options.

12. Click *Next* to continue.



13. Click *Install*.



14. Click *Finish*.



Please restart the 'ZyLAB Legal Review Standalone Service' after upgrading the ZyLAB Information Management Platform on Legal Review Servers. Otherwise you will get an error when that service is querying the indexes through the 'ZyLAB Platform SDK Service'.



TBIE Direct

Conditions

You want to use single-node TBIE direct setup of the Platform. This is a new implementation of the SDK service with improved stability and performance, smaller and faster indexes and less maintenance. Please keep in mind that:

- Indexes created by this service will be stored in one folder (compared to three folders in ZyPlatformSDKService).
- ZyTIMER is not used for building indexes. TBIE Direct has its own scheduler to perform these tasks.
- ZyFIND, ZyINDEX, ZyNET, and ZySCAN cannot be used with these indexes.
 - Use the ZyLAB Service Utility Tool to diagnose problems with these indexes. For more information, see the ZyLAB Service Utility Tool Manual.

Instructions

1. No manual modifications are needed.
2. If you want to use TBIE Direct after installing the eDiscovery bundle, stop Platform SDK and ZyTimer services, disable them and make sure the default serviceUriConfiguration points to TBIE Direct in the ZyLAB.Ediscovery.Review.Standalone.Winservice.exe.config file:
(net.tcp://MACHINENAME:4125/ZyIMAGE)

```
<serviceUriConfigurations>

    <serviceUriConfiguration name="PlatformSDK"
indexServiceUri="net.tcp://localhost:4115/ZyIMAGE"
contentAccessServiceUri="net.pipe://localhost/ZyLAB_TBIE_ContentAcc
essService" />

    <serviceUriConfiguration name="TBIE direct"
indexServiceUri="net.tcp://localhost:4125/ZyIMAGE"
contentAccessServiceUri="net.pipe://localhost/ZyLAB_TBIE_ContentAcc
essService" default="true" />

</serviceUriConfigurations>
```