Veritas eDiscovery Platform™

Native Viewer (ActiveX) Installation Guide

8.3

VERITAS™

Veritas eDiscovery Platform™: Native Viewer (ActiveX) Installation Guide

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Contents

About This Guide 5
Revision History 5
Technical Support 6
Documentation 6
Documentation Feedback 6

Installation and Configuration 7

Overview 7
Determine the Best Installation Method 7
Installation on Demand 8
Managed Deployment 8

Installing the Native Viewer (ActiveX) 11

Installation on Demand 11
Managed Deployment Installation 13

Appendix A: User and Internet Settings Reference 17

Appendix B: Product Documentation 21

Native Viewer Installation Guide

This section contains the following sections:

- *"About This Guide" in the next section*
- *"Revision History" on page 5*
- *"Technical Support" on page 6*
- *"Documentation" on page 6*
- *"Documentation Feedback" on page 6*

About This Guide

This document provides detailed step-by-step installation and configuration instructions for successfully installing and setting up Veritas's web-based Native Viewer. To enable native viewing simply requires the installation of ActiveX control.

Revision History

The following table lists the information that has been revised or added since the initial release of this document. The table also lists the revision date for these changes.

Revision Date	New Information
June 2017	• Minor edits
July 2016	• Branding and minor edits
August 2015	• Remove support for IE8 and add support for IE11 • Remove Rights Management Guide
March 2015	• Image accessibility • Branding and minor edits
October 2014	• IE requirements • branding and edits
March 2014	• branding edits
December 2013	• minor edits

Technical Support

Technical Support maintains support centers globally. All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policies.

For information about our support offerings and how to contact Technical Support, visit our website:

https://www.veritas.com/support

You can manage your Veritas account information at the following URL:

https://my.veritas.com

If you have questions regarding an existing support agreement, please email the support agreement administration team for your region as follows:

Worldwide (except Japan)	CustomerCare@veritas.com
Japan	CustomerCare_Japan@veritas.com

Documentation

Make sure that you have the current version of the documentation. The latest documentation is available from:

- **Documentation** link at the bottom of any page in the Veritas E-Discovery Platform landing page.
- **Veritas Technologies LLC. All rights reserved. Products Web site:** https://www.veritas.com/product/a-to-z

Documentation Feedback

Your feedback is important to us. Suggest improvements or report errors or omissions to the documentation. Include the document title, document version, chapter title, and section title of the text on which you are reporting. Send feedback to:

eDiscovery.InfoDev@veritas.com

You can also see documentation information or ask a question on the Veritas community site.

https://vox.veritas.com/

Installation and Configuration

Overview

The Review and Redaction features in the Analysis & Review module include fully integrated functionality for viewing documents in native and near-native image format with the viewer option ("Native Viewer") available in Document Review mode. The Native Viewer provides a view of Microsoft® Outlook, and Office documents equivalent to the view generated when printing the same document in the native application. Native viewing of a document enhances document review, especially for documents (such as Excel and PowerPoint) where graphs and charts are important to the meaning of the document.

The Veritas eDiscovery Platform's viewer is web-based and does not require any installation of native applications on the user's computer. Simply install an ActiveX control in the browser to enable native viewing.

Determine the Best Installation Method

When installing the Native Viewer, determine which Native Viewer installation methods is the best for your environment. The best method depends largely on the requirements of the organization deploying the application, as well as end users' rights, or permissions on individual workstations.

On Demand versus Managed Deployment Installation Options

In general, if the Native Viewer must be installed on a single workstation, (used by only one person), and the user has "Power User" class or higher permissions, then the "On Demand Installation" is the best option for the end user. In every other scenario, the recommendation is to use the "Managed deployment" method.

Prerequisites

Regardless of which installation approach you use, the Native Viewer requires installing the following prerequisite components, prior to running on a computer:

- Microsoft Windows

  Windows Vista, Windows 7, Windows 8 (non Metro), and Server 2008 are all supported operating systems. Due to the nature of the add-on application (delivery as an ActiveX control), use on other operating systems is not supported. In order to use this feature, a terminal services-based deployment is recommended to accommodate clients using other operating systems.

- Internet Explorer 10 or greater

  The Veritas eDiscovery Platform supports IE10 and IE11. See *Veritas Compatibility Matrix* for details.

Requirements

This section documents the permission requirements for each installation method.

Installation on Demand

When a user accesses the Review pane, and chooses the Native, Redaction, or Production views of a document, if the ActiveX control is not installed, the browser prompts the user to install the control. This control is installed on a per-user basis, rather than on a per-machine basis, and has the following additional requirements:

- User Account Control

  User Account Control (UAC) must be disabled on a workstation in order to allow the user to install the Native viewer.

- User Rights

  The Native Viewer is a signed ActiveX control. In order for a user to install the client control, their Internet Explorer browser needs to be configured to accept signed ActiveX controls, and must be enabled to run ActiveX controls.

  The user must also have the appropriate permissions to download and install the control. By default, most versions of Windows come with the Standard User and Restricted User roles. A user assigned to a group with the "Standard User" permission set is able to install the Native Viewer ActiveX control, but a user with only the "Restricted User" role cannot install Native Viewer ActiveX.

  Users on systems using enhanced security (Windows Vista, Windows 7,and Server 2008) must be a member of a group which has installation privileges. Veritas recommends that users on these target systems are members of the Power Users group (or a group with greater privileges).

- Executable Content in User Profile

  Using this approach, files containing executable content (such as dynamic link libraries) will be installed in user profile folders. This content (following decompression) will amount to approximately 45 MB of data.

Managed Deployment

The eDiscovery Platform provides a Windows Installer-based (MSI) version of the control, which can be deployed on a per-machine basis. The behavior of the installer differs somewhat from the installation on demand approach, and is recommended for deployment scenarios where any of the following are true:

- Multiple users log into the system, either concurrently or not (such as terminal services, Citrix® environments, or shared workstations)
- Users have restricted permissions
- User account control cannot be disabled
- Roaming profiles are in use

If moving forward with a managed deployment approach, an administrator can install the installer either on a baseline image, or deploy the installer using a push/pull deployment mechanism (such as Altiris™, SMS™, or Active Directory Group Policy). This requires two additional prerequisites:

- Microsoft Visual C++ 2008 SP1 runtime

  The Microsoft Visual C++ 2008 SP1 runtime must be installed. Without the runtime installed, users will encounter issues attempting to launch the viewer.

- Trusted Site

  Users accessing any/all eDiscovery Platform servers must be added to the Trusted Sites (or Local Intranet) zone of Internet Explorer. Without adding the site to one of these privileged zones, the system will revert to the behavior of the installation On Demand approach. This addition (or wildcard addition based on domain) can be done using a managed deployment approach as well.

Installing the Native Viewer (ActiveX)

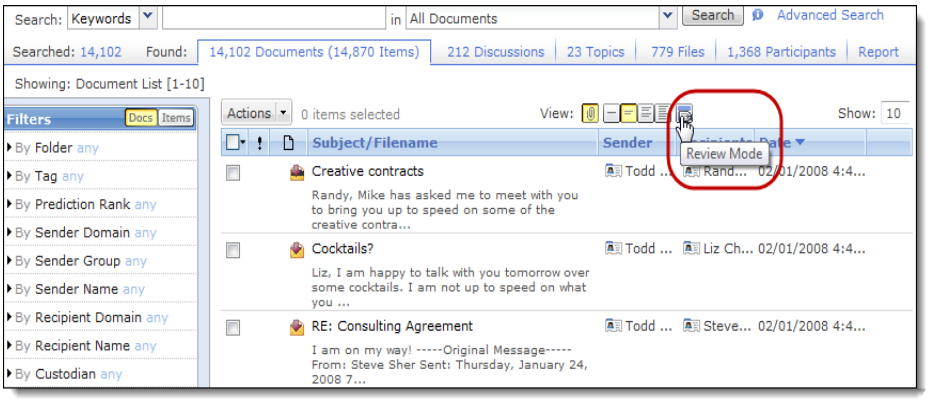
Follow the set of installation steps for the installation method that best suits your needs.

Installation on Demand

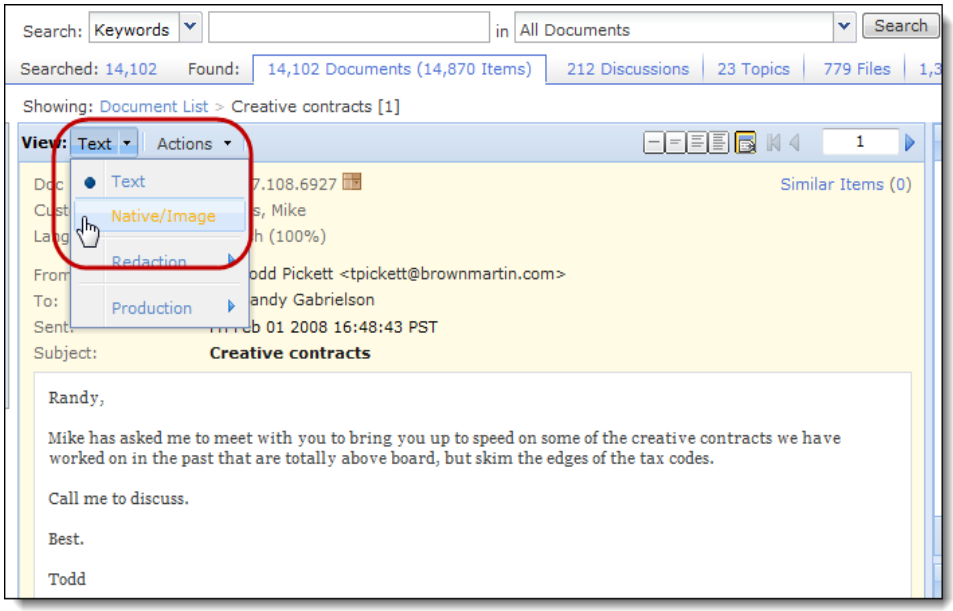
Note: If you access the platform from a desktop that is shared by different Windows users, the Managed Deployment installation approach is recommended.

To install the Native Viewer (ActiveX control):

1. Navigate to the appliance and open a case for which Review and Redaction is enabled. Run a search, and click to view in Review mode.



2. On the review page, click the **View** drop-down menu and select **Native/Image** view.

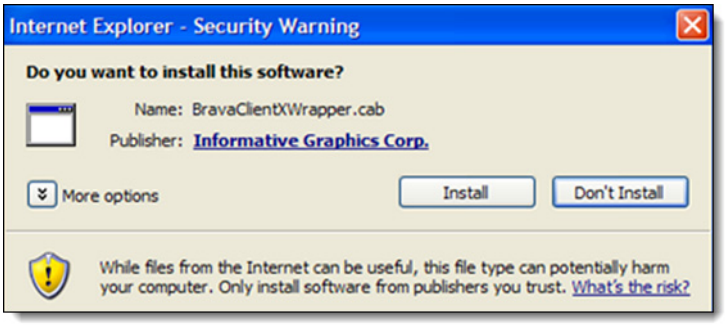


When you try to use the Native Viewer for the first time, the following warning might appear at the top of the browser.

"To help protect your security, Internet Explorer has restricted this webpage from running scripts or ActiveX controls that could access your computer. Click here for options..."

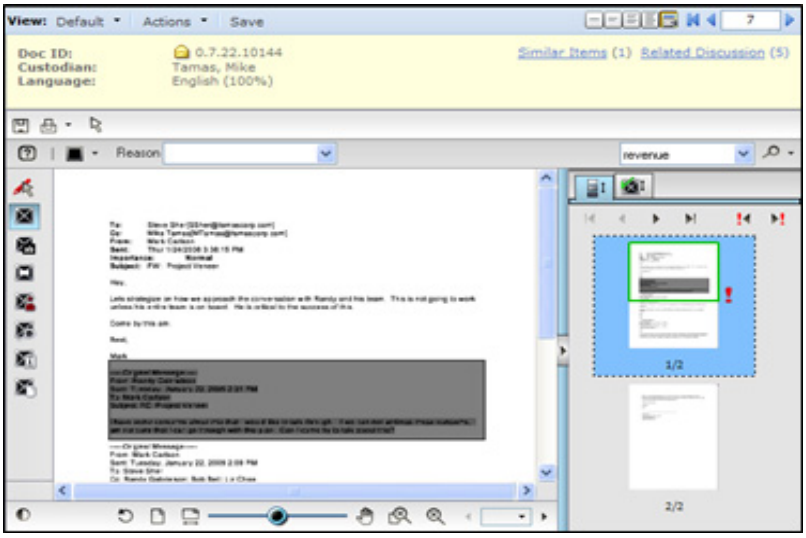
3. If a popup appears to refresh the browser, click **Refresh**. Otherwise, you may have to manually clear the browser and internet cache.

4. Click the warning and accept the ActiveX install. A popup appears prompting for permission to install the viewer ActiveX control.



5. Click **Install** to begin.

   When the installation completes, the document opens in native mode.



You have successfully installed and run the Native Viewer ActiveX control. If you have any difficulty installing the ActiveX control, contact Technical Support.

Managed Deployment Installation

There are two general approaches for using a Windows Installer-based installer for the Native Viewer: Manual installation or Enterprise deployment.

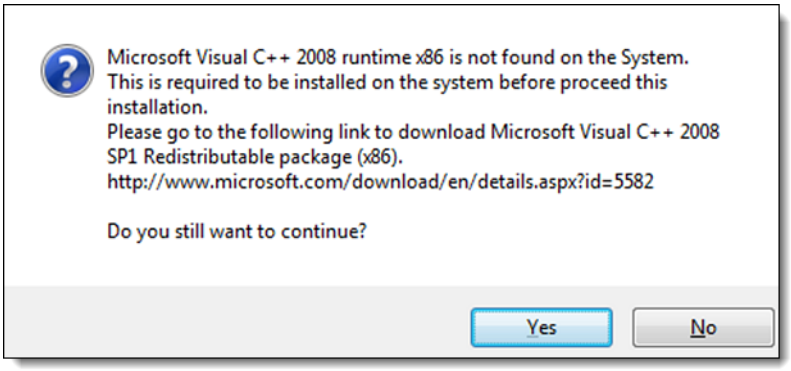
In either case, an administrator will need to log in to the target computer, and run the Native Viewer installer.

Manual Installation

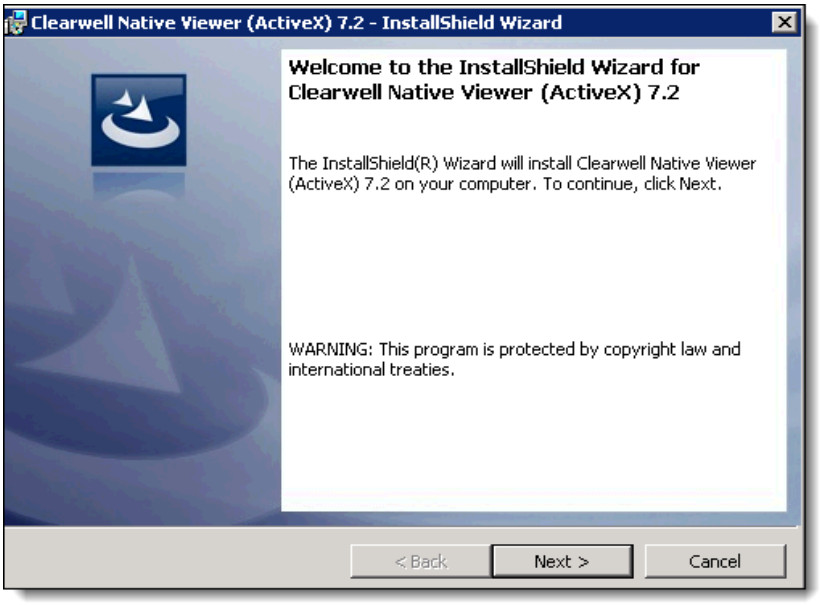
To install the Native Viewer using a Managed Deployment approach:

1. Log in to the target computer and run the Native Viewer (ActiveX control) installer.

   Note: The computer must have the Microsoft Visual C++ 2008 SP1 runtime installed. Without this runtime installed, certain components of the viewer will not work as expected; a warning appears if the component is not installed or out of date.



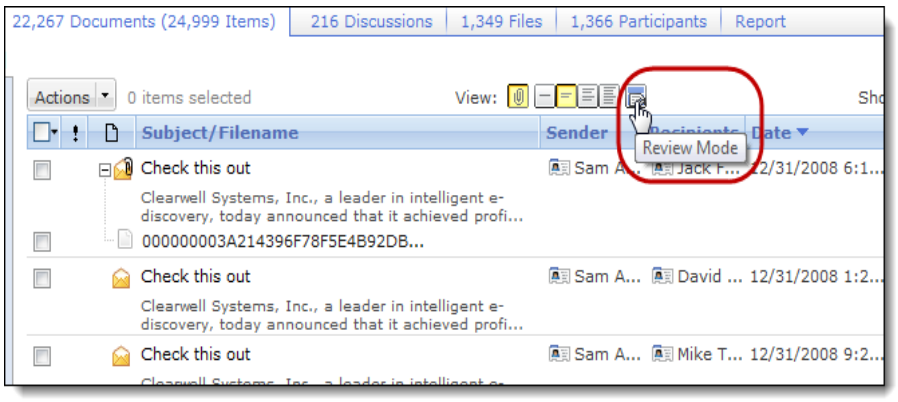
2. Once complete, navigate to the **utilities\NativeViewer** folder and run the Native Viewer (ActiveX) installer.



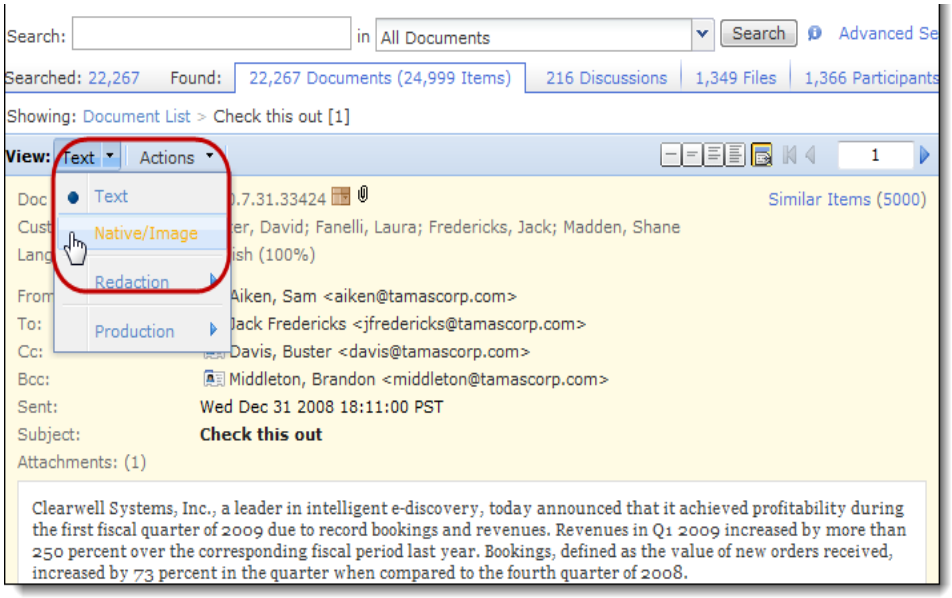
The InstallShield Wizard opens and guides you through the remaining steps for Native Viewer installation.

Once installation is complete, the Native Viewer becomes available for uninstall through the Control Panel (Veritas Native Viewer (ActiveX) 7.2).

3. Finally, browse to an appliance, log on, and open a case to view in Review mode.



On the review screen, click the View drop-down menu and select Native/Image view.



If a yellow bar appears at the top of the page, it indicates that either:

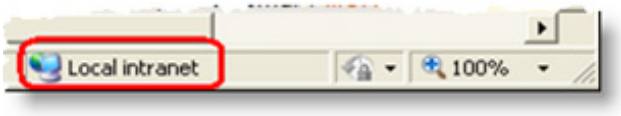
A. The computer does not have the viewer installed (verify through the Control Panel's Add or Remove Programs utility).

B. The site you are accessing is not a member of either the Local Intranet, or the Trusted Sites zone in Internet Explorer. As a member of either of these zones, the website has permission to launch the ActiveX control installed by the installer.

To validate that a site is in one of these trusted zones, from your browser, either:

– Verify that the site in use either by going to **File** > **Tools** > **Internet Options** and clicking the **Security** tab (see Appendix),

– Browse to the site, and check the status shown at the bottom right of the Internet Explorer window, in the status bar:



Enterprise Deployment

To deploy this product enterprise-wide, administrators can use any standard Managed deployment application. Veritas validates using both Microsoft Systems Management Server and Active Directory group policy (Software Installation) deployment as managed deployment applications.

Since this is a typical InstallShield installer, any of the InstallShield options can be used to manage the deployment. For example, to deploy the installer quietly, simply run the following command:

```
C:\WINDOWS>msiexec /I "Clearwell Native Viewer (ActiveX)7.2.msi" /qn
```

Administrators can use any of the standard Windows Installer commands. For more information, refer to Microsoft's standard installer command line options at:

http://msdn.microsoft.com/en-us/library/windows/desktop/aa367988(v=vs.85).aspx

Appendix A: User and Internet Settings Reference

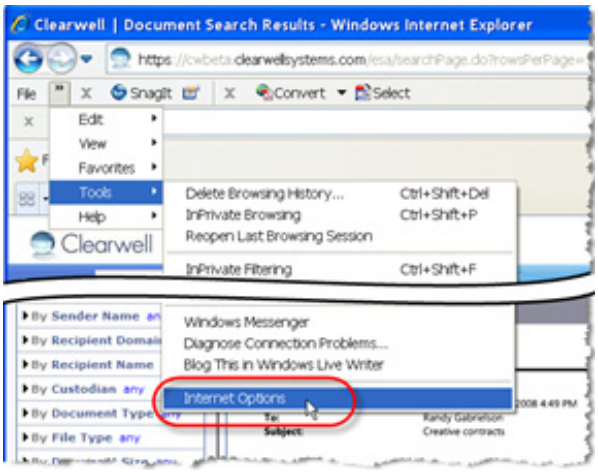
To see what type of an account a user has:

1. From the Control Panel, double-click **Users and Passwords** (User Accounts in Windows XP).
2. Select the user account and click the **Properties** button.
3. In the Properties dialog, select the **Group Membership** tab for the user group.

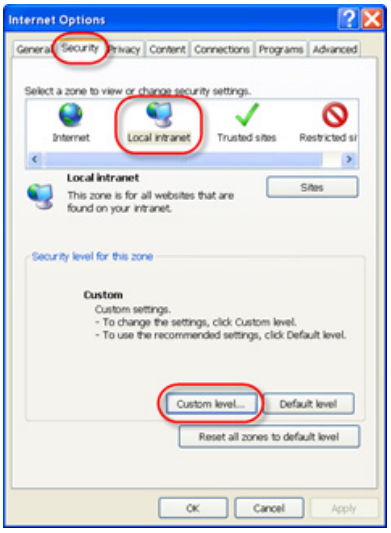
To view your IE security settings:

1. In the Internet Explorer web browser, go to **Tools** > **Internet Options**.

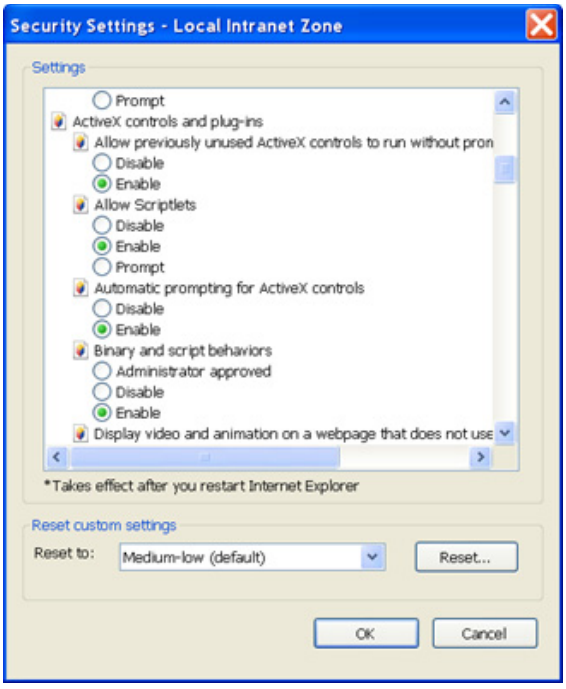
   The Internet Options window opens.



2. Click the **Security** tab, then **Custom Level**.



The Security Settings window opens.



3. In the ActiveX controls and plug-ins section, select the following security settings:
   - Download Signed ActiveX Controls = Prompt
   - Run ActiveX Controls and Plug-ins = Enable

4. Click **OK**.

Appendix B: Product Documentation

The table below lists the administrator and end-user documentation that is available for the Veritas eDiscovery Platform product.

Veritas eDiscovery Platform Documentation

Document	Comments
Installation and Configuration	
Installation Guide	Describes prerequisites, and how to perform a full install of the Veritas eDiscovery Platform application
Upgrade Overview Guide	Provides critical upgrade information, by version, useful prior to upgrading an appliance to the current product release
Upgrade Guide	Describes prerequisites and upgrade information for the current customers with a previous version of the software application
Componentized Virtualization Guide	Describes deployment of Veritas eDiscovery Platform utilizing multiple low-capacity virtual machines. Includes prerequisites and directions for configuration and installation.
Utility Node Guide	For customers using utility nodes, describes how to install and configure appliances as utility nodes for use with an existing software setup
Native Viewer Installation Guide	Describes how to install and configure the Brava Client for native document rendering and redaction for use during analysis and review
Distributed Architecture Deployment Guide	Provides installation and configuration information for the Review and Processing Scalability feature in a distributed architecture deployment
Getting Started	
Navigation Reference Card	Provides a mapping of review changes from 8.x compared to 7.x and the user interface changes from 7.x compared to 6.x
Administrator's QuickStart Guide	Describes basic appliance and case configuration
Reviewer's QuickStart Guide	A reviewer's reference to using the Analysis & Review module
Tagging Reference Card	Describes how tag sets and filter type impact filter counts
User and Administration	
Legal Hold User Guide	Describes how to set up and configure appliance for Legal Holds, and use the Legal Hold module as an administrator
Identification and Collection Guide	Describes how to prepare and collect data for processing, using the Identification and Collection module
Case Administration Guide	Describes case setup, processing, and management, plus pre-processing navigation, tips, and recommendations. Includes processing exceptions reference and associated reports, plus file handling information for multiple languages, and supported file types and file type mapping
System Administration Guide	Includes system backup, restore, and support features, configuration, and anti-virus scanning guidelines for use with Veritas eDiscovery Platform

Veritas eDiscovery Platform Documentation

Document	Comments
Load File Import Guide	Describes how to import load file sources into Veritas eDiscovery Platform
User Guide	Describes how to perform searches, analysis, and review, including detailed information and syntax examples for performing advanced searches
Export and Production Guide	Describes how to use, produce, and troubleshoot exports
Transparent Predictive Coding User Guide	Describes how to use the Transparent Predictive Coding feature to train the system to predict results from control data and tag settings
Audio Search Guide	Describes how to use the Audio Search feature to process, analyze, search and export search media content
Reference and Support	
Audio Processing	A quick reference card for processing multimedia sources
Audio Search	A quick reference card for performing multimedia search tasks
Legal Hold	A quick reference card of how to create and manage holds and notifications
Collection	A quick reference card of how to collect data
OnSite Collection	A quick reference for performing OnSite collection tasks
Review and Redaction	Reviewer's reference card of all redaction functions
Keyboard Shortcuts	A quick reference card listing all supported shortcuts
Production	Administrator's reference card for production exports
User Rights Management	A quick reference card for managing user accounts
Online Help	
Includes all the above documentation (excluding Installation and Configuration) to enable search across all topics. To access this information from within the user interface, click **Help**.	
Release	
Release Notes	Provides latest updated information specific to the current product release