

# ATIPXpress



OPEXUS

## Collaboration Deployment Manual

v11.5.0

January 2024



# AX 11.5.0 Collaboration Deployment Manual

## Notice of Rights

Copyright © 2024, AINS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: AINS, LLC. For information on obtaining permission for reprints and excerpts, contact [info@opexustech.com](mailto:info@opexustech.com).

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

## Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (AINS, LLC.) on an “As Is” basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

## Notice of Trademarks

The publisher’s company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: AINS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

## Non-Disclosure Statement

This document’s contents are confidential and proprietary to AINS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from AINS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

## Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of AINS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.



# Contents

1	ATIPXpress Collaboration Portal Deployment Introduction .....	5
1.1	About This Document .....	5
1.2	ATIPXpress Collaboration Portal Installation Package.....	5
1.3	Deployment Procedure .....	5
2	Collaboration Portal Installation Prerequisites.....	6
2.1	Deployment Requirements .....	6
2.2	Install SQL Server Module.....	7
3	Download the Installation Package.....	9
3.1	Verify the Integrity of the Installation Package .....	9
3.2	About the Installation Package.....	10
4	Inputs.json Settings for Installation .....	11
4.1	About the Inputs.json File.....	11
4.2	Install Type.....	12
4.3	Install Components .....	12
4.4	Application and Scheduler .....	13
4.5	Database Settings.....	14
4.6	File Repository Settings .....	16
4.7	Authentication Settings.....	16
4.8	SMTP Server Settings .....	18
4.9	Configuration .....	19
5	Inputs.json Settings for Upgrade .....	22
5.1	Install Type.....	22
5.2	Components .....	22
5.3	Application and Scheduler.....	23
5.4	Database Settings.....	24
5.5	File Repository Settings .....	25



## Contents

5.6	Authentication Settings.....	25
5.7	SMTP Server Settings .....	25
5.8	Configuration .....	25
6	Install Collaboration Portal .....	26
7	Post-Deployment Configuration.....	27
7.1	Set HTTPS-enabled URL .....	27
7.2	Add DNS Binding .....	27
7.2.1	Add Binding (Single Server) .....	28
7.2.2	Add Binding (Separate Collaboration and Application Servers) .....	28



# 1 ATIPXpress Collaboration Portal Deployment Introduction

The purpose of this document is to provide instructions for deploying the Collaboration Portal within your ATIPXpress environment.

The ATIPXpress Collaboration Portal facilitates document reviews with users outside of your ATIPXpress environment. With the Collaboration Portal, AX users can send document requests to outside users, and responsive documentation provided in response can be added to your AX Document Management and in subsequent request responses.

## 1.1 About This Document

This manual is intended to guide system administrators through the required steps to deploy ATIPXpress Collaboration Portal within their organization, including both new installations and upgrades.

## 1.2 ATIPXpress Collaboration Portal Installation Package

The ATIPXpress installation package is a zip file containing all the files needed to install ATIPXpress Collaboration Portal. Your customized installation is driven by the values set in the *Inputs.Json* file located at the root of directory where the zip file is extracted.

Contact OPEXUS support at [support@opexustech.com](mailto:support@opexustech.com) for your installation package.

## 1.3 Deployment Procedure

Deploying ATIPXpress Collaboration Portal follows the procedure outlined below. Each step is covered in the subsections in this manual.

1. Download and verify the installation package, then extract the files.
2. Update the Inputs.json file with your deployment details.
3. Run Install.ps1



## 2 Collaboration Portal Installation Prerequisites

### 2.1 Deployment Requirements

While the ATIPXpress deployment package (and this manual) are designed to be usable by anyone, we recommend that installation be completed by an experienced system administrator, as knowledge about your organization's architecture are necessary to execute this deployment. It is important to check the person doing the installation has the level of access and the accounts specified in the Inputs.json have the access level needed for upgrading or installing the application, databases and services specified.

The installation package must be deployed from the application server, which must meet the requirements outlined below:

Requirement	Description
<b>Location</b>	Deployment scripts can be executed from Application server. The script must be executed from application server if the Application or Scheduler are installed.
<b>User Permissions</b>	The logged-in user should have the local administrator permissions.
<b>Operating System Requirements</b>	Windows 2016/2019/2022
<b>Microsoft .NET Framework 4.8 Runtime</b>	Microsoft .NET Framework 4.8 Runtime must be downloaded and installed. It can be downloaded and installed from the following location: <a href="https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48">https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48</a>



Requirement	Description
<b>SqlPackage</b>	The SqlServer module must be downloaded and installed on the application server. See the <i>Install SQL Server Module</i> section for steps.
<b>SqlServer</b>	SqlServer must be downloaded and installed. It can be downloaded from the following location: <a href="https://www.powershellgallery.com/packages/SqlServer/21.1.18256">https://www.powershellgallery.com/packages/SqlServer/21.1.18256</a>
<b>PowerShell Version</b>	PowerShell 5.1.22621.963 must be installed for deployment using auto deployment. <a href="https://www.microsoft.com/en-us/download/details.aspx?id=54616">https://www.microsoft.com/en-us/download/details.aspx?id=54616</a>
<b>Microsoft Visual C++ Redistributable</b>	The Microsoft Visual C++ Redistributable must be downloaded and installed on the application server for all new FX installs. <b>(!!) Note: Both executables below must be downloaded and installed.</b> <a href="https://download.microsoft.com/download/1/6/5/165255E7-1014-4D0A-B094-B6A430A6BFFC/vcredist_x86.exe">https://download.microsoft.com/download/1/6/5/165255E7-1014-4D0A-B094-B6A430A6BFFC/vcredist_x86.exe</a> <a href="https://download.microsoft.com/download/1/6/B/16B06F60-3B20-4FF2-B699-5E9B7962F9AE/VSU_4/vcredist_x86.exe">https://download.microsoft.com/download/1/6/B/16B06F60-3B20-4FF2-B699-5E9B7962F9AE/VSU_4/vcredist_x86.exe</a>

## 2.2 Install SQL Server Module

Follow the steps below to install the SQL Server Module on the application server:

1. Navigate to the following link:  
<https://www.powershellgallery.com/packages/SqlServer/21.1.18256>
2. Under *Installation Options*, select **Manual Download**:



Installation Options

Install Module

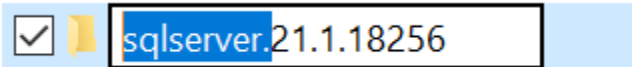
Azure Automation

Manual Download

Manually download the .nupkg file to your system's default download location. Note that the file won't be unpacked, and won't include any dependencies. [Learn More](#)

Download the raw nupkg file

3. Click **Download the raw nupk file**. The SQLServer .nupkg file downloads.
4. Locate the downloaded "SQLServer" file, then right click it and select **Properties**.
5. On the *General* tab, select **Unblock**, then click **Apply**.
6. Next, edit the "SQLServer" file extension from .nupkg to .zip.
7. Extract the .zip package in the downloaded location. After the folder is extracted, remove "sqlserver." from the folder name:



8. Navigate to `C:\ProgramFiles\WindowsPowerShell\Modules` and create a folder called **SqlServer**.
9. Copy the renamed .zip folder from the downloaded location to the *SqlServer* folder created in the previous step (`C:\ProgramFiles\WindowsPowerShell\Modules\SqlServer`)











## 3 Download the Installation Package

The Collaboration Portal installation package contains the files needed to install ATIPXpress and its associated components. Contact OPEXUS support at [support@opexustech.com](mailto:support@opexustech.com) for your installation package.

After downloading the package, follow the steps below to unzip the file:

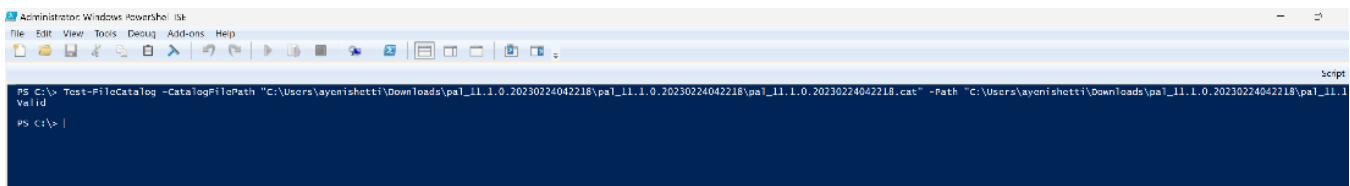
1. Locate the downloaded .zip file, then right click it and select **Properties**.
2. On the *General* tab, select **Unblock**, then click **Apply**.
3. Next, unzip the contents of the folder. The contents of the package appear as shown in the following example:

<input type="checkbox"/> Name	Type	Date modified
 dbscripts	File folder	2/24/2023 8:26 PM
 FOIAXpress	File folder	2/24/2023 8:27 PM
 installscripts	File folder	2/24/2023 8:20 PM
 inputs.json	JSON File	2/24/2023 8:20 PM
 install	Windows PowerShell Script	2/24/2023 8:20 PM
 uninstall	Windows PowerShell Script	2/24/2023 8:20 PM

### 3.1 Verify the Integrity of the Installation Package

Steps to verify the integrity of the installation package.

1. Open Windows Powershell ISE.
2. Use the command below to verify the integrity of installation package:  
*Test-FileCatalog -CatalogFilePath "<<catalog file path(with extension of .cat) from downloaded artifact>>" -Path "<< folder that should be validated against the catalog file >>"*
3. It will show as valid, as shown in the following example:









```
PS C:\> Test-FileCatalog -CatalogFilePath "C:\Users\ayenishetti\Downloads\pal_11.1.0.20230224042218\pal_11.1.0.20230224042218.cat" -Path "C:\Users\ayenishetti\Downloads\pal_11.1.0.20230224042218\pal_11.1.0.20230224042218"
Valid
PS C:\>
```



## 3.2 About the Installation Package

There are two primary files you'll interact with during installation:

<input type="checkbox"/> Name	Type
 Collaboration	File folder
 dbscripts	File folder
 installscripts	File folder
 inputs <b>1</b>	JSON File
 install <b>2</b>	Windows PowerShell Script
 uninstall	Windows PowerShell Script

1. *Inputs.json*: Drives the installation of the Collaboration Portal components. The file is in a standard json format and needs to remain a valid json file for successful installation.
2. *Install.ps1*: The executable file you will run to deploy the installation package with the parameters configured in the Inputs.json file.



## 4 Inputs.json Settings for Installation

### 4.1 About the Inputs.json File

The Inputs.json file located in the root directory of the extracted deployment package zip file drives the installation of the different components of the ATIPXpress Collaboration Portal. The file is in a standard json format and needs to remain a valid json file post updates prior to the installation.

The settings are grouped into sections, each addressing settings which may or may not require configuration, depending on your specific installation. The following subsections in this chapter describe each section of the Inputs.Json file.

The parent node is the 'inputs' section. This section appears as follows:

```
{
  "inputs": {
    "InstallType": {
      "New": "N",
      "Upgrade": "Y"
    },
    "Components": {
      "APP": "Y",
      "DB": "N"
    }
  },
}
```

Each section has parameters you can adjust to configure your installation. An example section is shown below, with an explanation for how it works:

Each (1) *Section* ("InstallType" in this example) includes various (2) *Settings* ("New" in this example) to configure.

```
{
  "inputs": {
    1 "InstallType": {
      2 "New": "N",
      "Upgrade": "Y"
    },
    "Components": {
      "APP": "Y",
      "DB": "N"
    }
  },
}
```

**A**      **B**

For each (A) Setting ("Upgrade" here), you can edit the (B) text in quotations ("N" here to indicate "No") to configure the settings for your installation. This might include adding a file path, user name, password, or simply a "Y" or "N" depending on the field you are configuring.



The first section under the parent node is the Install Type. See the following section for details on configuring your install type, with the remaining sections following in the order they appear in the Inputs file.

## 4.2 Install Type

Use the “InstallType” section to determine if this is a new installation, or an upgrade for an existing system:

```
"inputs": {  
  "InstallType": {  
    "New": "Y",  
    "Upgrade": "N"  
  }  
}
```

Setting	Description
<b>New</b>	Determine whether this is a new installation. For new installations this should be a “Y” value
<b>Upgrade</b>	Determine whether this is an upgrade for an existing application. For new installations this should be a “N” value

## 4.3 Install Components

The “Components” section allows you to determine which components to include with this installation. To include a component with your installation, be sure to assign the component a “Y” value on the corresponding line.:

```
"Components": {  
  "APP": "Y",  
  "SCHEDULER": "Y",  
  "DB": "N"  
}
```



Setting	Description
<b>APP</b>	Include the ATIPXpress Collaboration Portal in this installation procedure. This should be a “Y” value for new installations and upgrades if the applications needs to be installed or upgraded respectively.
<b>SCHEDULER</b>	Include the ATIPXpress Collaboration Portal Scheduler in this installation procedure. This should be a “Y” value for new installations and upgrades if the scheduler needs to be newly installed or upgraded respectively.
<b>DB</b>	Include the ATIPXpress Collaboration Portal Database in this installation procedure. This should be a “Y” value for new installations and upgrades if the database needs to be newly installed or upgraded respectively

## 4.4 Application and Scheduler

The “APPANDSCHEDULER” section has settings related to the Collaboration Portal application and scheduler installations. A value must be set for all values in this section to successfully install the application:

**(!!) Note: Any file paths specified must have two backslashes where a path in windows explorer requires a single backslash.**

```
"APPANDSCHEDULER": {
  "InstallLocation": "C:\\\\Program Files (x86)",
  "BackupLocation": "C:\\\\temp\\backup",
  "CollabSSLCert": {
    "SSLPort": "443",
    "CertPath": "<<CERTIFICATE PATH>>",
    "CertPassword": "<<CERTIFICATE PASSWORD>>",
    "DNSName": "Collaboration"
  },
  "AppPool": "CollabAppPool"
```



Setting	Description
<b>InstallLocation</b>	Specify a path for the Collaboration Portal installation. Note this must be a file path for the .json file the execute.
<b>BackupLocation</b>	Specify a path for the Collaboration Portal backup location. Note this must be a file path for the .json file the execute
<b>SSLCert</b>	The following lines contain the SSL Certificate information. No data is required on this line. This is the grouping for SSL Certification settings to be used for the installation.
<b>SSLPort</b>	The network port designated for your application's secure communications using SSL.
<b>CertPath</b>	Specify a path where the .pfx certificate file is located. Note this must a file path for the .json file to execute
<b>CertPassword</b>	Enter the password associated with the certificate linked in the "CertPath" field
<b>DNSName</b>	Enter the Domain Name System (DNS) name for the domain associated with the application.
<b>AppPool</b>	Enter the name of the application pool associated with your ATIPXpress Collaboration Portal,

## 4.5 Database Settings

The "DB" section contains the settings for installing or upgrading your Collaboration Portal database. In case of a new installation, an agent account will be created.



```

"DB": {
  "DBServer": "<<DATABASE SERVER NAME>>",
  "DBName": "<<DATABASE NAME>>",
  "CreatorDBUserId": "<<DB CREATER USER ID>>",
  "CreatorDBUserPassword": "<<DB CREATER USER ID PASSWORD>>",
  "IntegratedSecurity": "N",
  "AgentAccount": "<<AGENT NAME TO CONNECT COLLAB DB>>",
  "AgentAccountPassword": "<<AGENT PWD>>",
  "AgentAccountIntegratedSecurity": "N"
}

```

Setting	Description
<b>DBServer</b>	Name assigned to the server responsible for storing, retrieving, and managing Collaboration Portal data
<b>DBName</b>	Name given to the specific database used for ATIPXpress Collaboration Portal
<b>CreatorDBUserID</b>	Database User ID to be used for this installation. The CreatorDBUserId should have admin rights with the ability to create a new database or database object on the specified Database server
<b>CreatorDBUserPassword</b>	Password associated with the account used in the "CreatorDBUserID" field
<b>IntegratedSecurity</b>	The Integrated Security property instructs the SQL Client to connect to SQL Server using Windows Authentication through the Security Support Provider Interface (SSPI). Use "Y" or "N" to determine if you are using Integrated Security in this installation.
<b>AgentAccount</b>	The SQL server login account to be created in case of a new database install or the login already setup for the database being upgraded

Setting	Description
<b>AgentAccountPassword</b>	The SQL server Agent Account password specified in the AgentAccount setting
<b>AgentAccountIntegratedSecurity</b>	Whether integrated security should be used when connecting to the database, default is "N"

## 4.6 File Repository Settings

The "FileRepository" section contains the setting for different file paths used by the Collaboration Portal to store files.

```
"FileRepository": {
  "Documents": "<<Documents Path>>",
  "Correspondence": "<<Correspondence Path>>"
}
```

Setting	Description
<b>Documents</b>	Enter the file path location for the Documents repository.
<b>Correspondence</b>	Enter the file path location for the Correspondence repository

## 4.7 Authentication Settings

The "Authentication" section contains settings needed for ATIPXpress to authenticate using FORMS authentication after the application is installed:





```

"Authentication": {
  "Type": "FORMS",
  "//Type Comment": "Type can be one of these FORMS,SSO,EAUTHENTICATION",
  "Forms": {
    "MembershipProvider": "DATABASE",
    "//MembershipProvider Comments": "MemberProvider can be one of these DATABASE,LDAP",
    "LdapAccountUsername": "",
    "LdapAccountPassword": "",
    "LdapUrl": "",
    "LdapSynchronizeAdUsersUserName": "",
    "LdapSynchronizeAdUsersPassword": "",
    "LdapSynchronizeAdUsersUrl": ""
  },
  "eAuthentication": {
    "eAuthenticationLogoutUrl": ""
  }
}

```

Setting	Description
<b>Type</b>	Enter the type of authentication used. Options include FORMS, SSO, and EAUTHENTICATION.
<b>Type Comment</b>	Lists the authentication Types that can be entered in the field above (FORMS, SSO, and EAUTHENTICATION).
<b>Forms</b>	The Forms authentication fields are listed in this subsection. These only need to be filled in if using FORMS authentication.
<b>MembershipProvider</b>	Enter the membership provider type. Options include DATABASE or LDAP.
<b>MembershipProvider Comments</b>	Lists the membership provider types that can be entered in the field above (DATABASE or LDAP).
<b>LdapAccountUsername</b>	Username associated with the LDAP account used for authentication.



Setting	Description
<b>LdapAccountPassword</b>	Password associated with the LDAP account username used in the field above.
<b>LdapUrl</b>	URL associated with the LDAP server
<b>LdapSynchronizeAdUsersUserName</b>	LDAP User Name
<b>LdapSynchronizeAdUsersPassword</b>	LDAP Password
<b>LdapSynchronizeAdUsersUrl</b>	LDAP URL
<b>eAuthentication</b>	eAuthentication details are included in this subsection (if eAuthentication is the selected authentication type).
<b>eAuthenticationLogoutUrl</b>	Redirect URL for users when logged out using eAuthentication.

## 4.8 SMTP Server Settings

The “SMTPServer” section contains setting for the application’s mail server:

```
"SMTPServer": {
  "Address": "0.0.0.0",
  "PortNo": "25"
```

Setting	Description
<b>Address</b>	Address of the server responsible for sending email messages from the ATIPXpress application.



Setting	Description
<b>PortNo</b>	Port number associated with the SMTP server entered in the “Address” setting

## 4.9 Configuration

The “Configuration” section contains settings for initial install configuration, setting up the basic details required to log in and get started in the Collaboration Portal. This account is the primary administrator account for the application:

```
"Configuration": {
  "AdminUser": {
    "Login": "Admin",
    "Password": "<<PASSWORD>>",
    "FirstName": "Admin",
    "LastName": "Admin",
    "Email": "<<EMAIL ID>>"
  },
  "Organization": {
    "Name": "<<ORGANIZATION NAME>>",
    "OfficeName": "<<OFFICE NAME>>",
    "OfficeCode": "<<OFFICE CODE>>"
  },
  "FiscalYear": {
    "CurrentFY": "2023",
    "Starts": "10/01/2022",
    "Ends": "09/30/2023"
  },
  "ActType": {
    "ATIAPA": "N",
    "FOIP": "N",
    "FIPPA": "N"
  }
}
```

Setting	Description
<b>AdminUser</b>	This subsection allows you to configure the basic details and sign in information for the initial Admin user account you’d like to create in the system.



## Inputs.json Settings for New Installations

Setting	Description
<b>Login</b>	Enter the username you'd like to assign for the first Admin application user.
<b>Password</b>	Enter a password for the Admin account associated with the username you entered above.
<b>FirstName</b>	Enter the first name you'd like to associate with this Admin account
<b>LastName</b>	Enter the last name you'd like to associate with this Admin account
<b>Email</b>	Enter an email address for this Admin account.
<b>Organization</b>	Use this subsection to provide your basic organization details.
<b>Name</b>	Enter a name for your organization, as it should appear in the system.
<b>OfficeName</b>	Provide an initial office name for an organization office. You'll be able to add more offices in the application configuration.
<b>OfficeCode</b>	Enter a system code assigned to this office, to assist with request identification and assignment.
<b>FiscalYear</b>	Use this subsection to configure the fiscal year details for your application
<b>CurrentFY</b>	Enter the current fiscal year used in your application in "YYYY" format (e.g., "2023")
<b>Starts</b>	Provide a start date for your fiscal year in MM/DD/YYYY format (e.g., "01/01/2023")



## Inputs.json Settings for New Installations

Setting	Description
<b>Ends</b>	Provide an end date for your fiscal year in MM/DD/YYYY format (e.g., "12/31/2023")
<b>ActType</b>	This field is not applicable for ATIPXpress. Do not edit or remove this field.
<b>ATIAPA</b>	This field is not applicable for ATIPXpress. Do not edit or remove this field.
<b>FOIP</b>	This field is not applicable for ATIPXpress. Do not edit or remove this field.
<b>FIPPA</b>	This field is not applicable for ATIPXpress. Do not edit or remove this field.



## 5 Inputs.json Settings for Upgrade

This section discusses the inputs.json settings used when upgrading an existing AX Collaboration Portal. For information on using the inputs.json file, see the *About the Inputs.json File* section of this manual.

**(!!) Note: Some fields that would be required for a new installation should be left as-is for an upgrade. It is important to not edit or remove these fields as this could compromise the integrity of the inputs.json file. These are described where appropriate in the following sections.**

### 5.1 Install Type

Use the “InstallType” section to determine if this is a new installation, or an upgrade for an existing system:

```
"inputs": {  
  "InstallType": {  
    "New": "N",  
    "Upgrade": "Y"
```

Setting	Description
New	Determine whether this is a new installation. For upgrades this should be a “N” value
Upgrade	Determine whether this is an upgrade for an existing application. For upgrades this should be a “Y” value

### 5.2 Components

The “Components” section allows you to determine which components to include with this upgrade. If you included a component in your previous installation, be sure to assign the component a “Y” value on the corresponding line:



```
"Components": {
  "APP": "Y",
  "SCHEDULER": "Y",
  "DB": "N"
```

Setting	Description
<b>APP</b>	Include the Collaboration Portal application in this upgrade procedure. This should be a “Y” value for upgrades.
<b>SCHEDULER</b>	Include the Scheduler in this upgrade procedure. This should be a “Y” value for upgrades if the scheduler needs to be upgraded.
<b>DB</b>	Include the Database in this upgrade procedure. This should be a “Y” value for upgrades.

## 5.3 Application and Scheduler

The “APPANDSCHEDULER” section only requires input in the InstallLocation and BackupLocation fields.

**(!!) Note: All fields not listed above can remain as-is during an upgrade.**

```
"APPANDSCHEDULER": {
  "InstallLocation": "C:\\Program Files (x86)",
  "BackupLocation": "C:\\temp\\backup",
  "CollabSSLCert": {
    "SSLPort": "443",
    "CertPath": "<<CERTIFICATE PATH>>",
    "CertPassword": "<<CERTIFICATE PASSWORD>>",
    "DNSName": "Collaboration"
  },
  "AppPool": "CollabAppPool"
```

Setting	Description
<b>InstallLocation</b>	Specify a path for the application installation. Note this must be a file path for the .json file the execute.



Setting	Description
<b>BackupLocation</b>	Specify a path for the application backup location. Note this must be a file path for the .json file the execute.  <b>(!!) Note: The BackupLocation must exist in the specified file path</b>

## 5.4 Database Settings

The “DB” section contains the settings for installing or upgrading your Collaboration Portal database.

**(!!) Note: You do not need to edit the AgentAccount fields during an upgrade, these can remain as-is.**

```
"DB": {
  "DBServer": "<<DATABASE SERVER NAME>>",
  "DBName": "<<DATABASE NAME>>",
  "CreatorDBUserId": "<<DB CREATER USER ID>>",
  "CreatorDBUserPassword": "<<DB CREATER USER ID PASSWORD>>",
  "IntegratedSecurity": "N",
  "AgentAccount": "<<AGENT NAME TO CONNECT COLLAB DB>>",
  "AgentAccountPassword": "<<AGENT PWD>>",
  "AgentAccountIntegratedSecurity": "N"
```

Setting	Description
<b>DBServer</b>	Name assigned to the server responsible for storing, retrieving, and managing Collaboration Portal data
<b>DBName</b>	Name given to the specific database used for the Collaboration Portal.
<b>CreatorDBUserID</b>	Database User ID to be used for this installation. The CreatorDBUserId should have admin rights with the ability to create a new database or database object on the specified Database server





Setting	Description
<b>CreatorDBUserPassword</b>	Password associated with the account used in the “CreatorDBUserID” field
<b>IntegratedSecurity</b>	Use “Y” or “N” to determine if you are using integrated security in this installation

## 5.5 File Repository Settings

The “FileRepository” section contains the setting for different file paths used by the ATIPXpress application to store files.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.6 Authentication Settings

The “Authentication” section contains settings needed for ATIPXpress to authenticate using FORMS authentication after the application is installed. These fields can remain as-is during the upgrade.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.7 SMTP Server Settings

The “SMTPServer” section contains setting for the application’s mail server. These fields can remain as-is during the upgrade.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.8 Configuration

The “Configuration” section contains settings for initial install application configuration, setting up the basic details required to log in and get started in the application. This account is the primary administrator account for the application.

**(!!) Note: These fields can remain as-is during the upgrade.**




## 6 Install Collaboration Portal

Before you are ready to run the Install.ps1 file, review the steps below to verify you've completed all the steps to this point:

- Ensure your system meets the minimum requirements.
- Make sure you have connectivity to the servers where the software is being installed.
- Download, verify, and extract the Collaboration Portal Installation package.
- Configure the Inputs.json file for your installation.

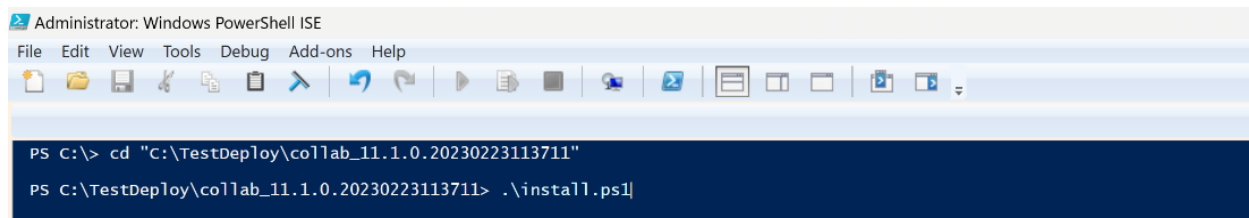
Once the above prerequisites are complete, follow the steps below to deploy the Collaboration Portal Installation package.

1. Open Windows Powershell ISE
2. Use PowerShell to navigate to the location where you extracted the installation package:



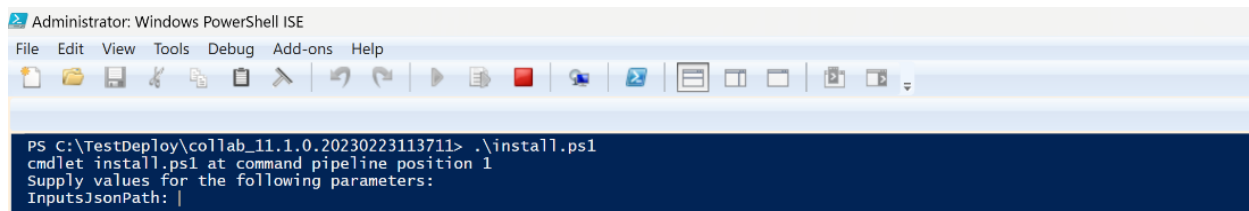
```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\> cd "C:\TestDeploy\collab_11.1.0.20230223113711"
```

3. Type .\install.ps1 for either install or upgrade



```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\> cd "C:\TestDeploy\collab_11.1.0.20230223113711"
PS C:\TestDeploy\collab_11.1.0.20230223113711> .\install.ps1
```

4. If the inputs.json file is in same location as the extracted installation files, simply click enter to execute the installation. Alternatively, if you have file in different location provide this file location, then execute the script.



```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\TestDeploy\collab_11.1.0.20230223113711> .\install.ps1
cmdlet install.ps1 at command pipeline position 1
Supply values for the following parameters:
InputsJsonPath: |
```

5. The installation procedure executes. See the following section for post-installation procedures to verify the application deployed successfully.



## 7 Post-Deployment Configuration

After deploying the Collaboration Portal either via new installation or an upgrade of an existing environment, please review the following sections to ensure the post-deployment configuration actions are completed.

### 7.1 Set HTTPS-enabled URL

From v11.3.0 onward, the Collaboration Portal URL requires an HTTPS endpoint.

(!!) Note: Use a fully qualified domain name while configuring the HTTPS endpoint in the Collaboration Room URL. Follow the steps below to update the endpoint to HTTPS:

1. Access your ATIPXpress application as an Administrator.
2. Click the **Administration** option from the top toolbar.
3. Under *Administration*, select the **Collaboration Room** option to open the *Collaboration Configuration* screen.
4. Locate the *Collaboration Room URL* field, and update the URL to your HTTPS-enabled URL:

System Configuration

System Administration

Dashboards

Security

Organization Setup

**Collaboration Room**

Lookups

Request Management

Document Management

**Collaboration Configuration**

Contact Mapping Type

☐ Request for Documents / Consultation Module ☐ Collaboration Room ☒ Both

☒ Enable RFD ☒ Enable Consultation

Collaboration Room URL\* : <https://qa-fx-win2022.ains-inc.com/Collaboration>

Web Service User Name\* : .administrator

Web Service Password\* :

Save

5. Click **Save** to save the changes.

### 7.2 Add DNS Binding

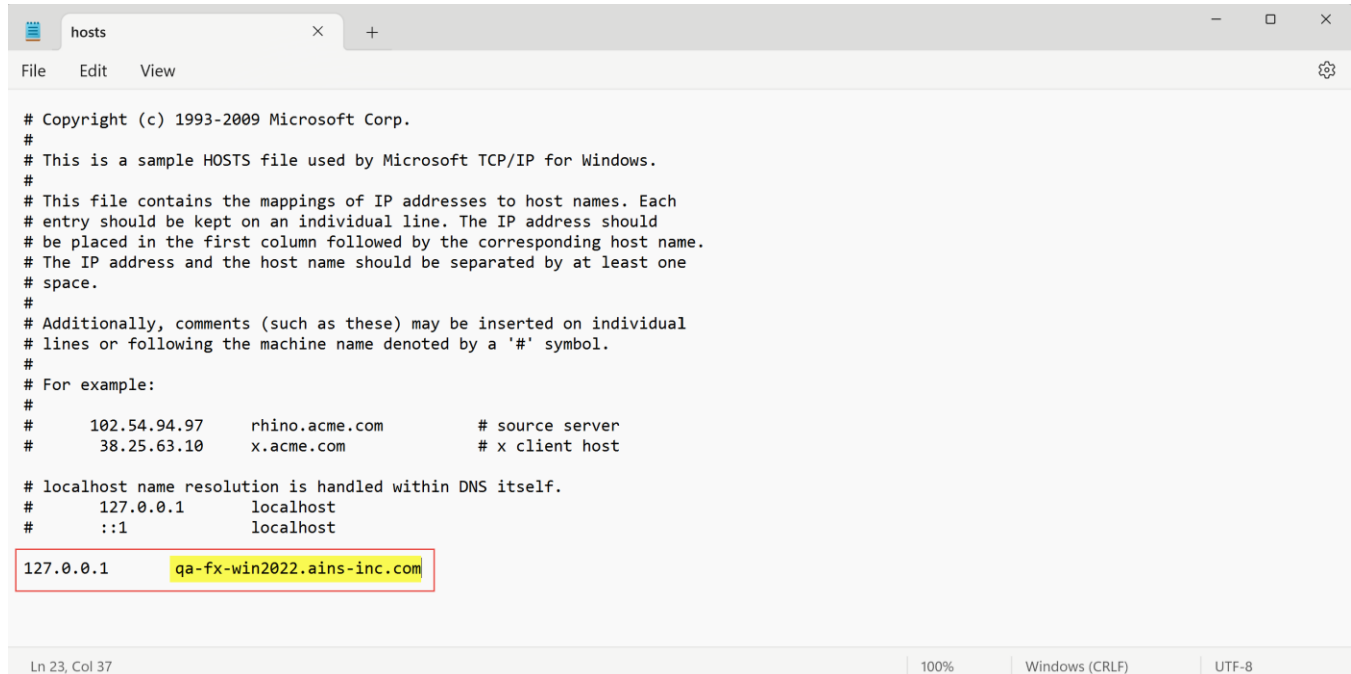
For non-public Collaboration Portal environments, you are also required to add a DNS binding to allow the Collaboration Portal to function correctly.



## 7.2.1 Add Binding (Single Server)

If your Collaboration Portal resides on the same server as your ATIPXpress application, you must add a DNS binding to the “hosts” file. Follow the steps below to add this binding.

1. On the application server, locate and open the “hosts” file (C:\Windows\system32\drivers\etc\).
2. In the “hosts” file, add the text shown below, replacing the highlighted portion with your qualified DNS name for the Collaboration site:



```
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97       rhino.acme.com       # source server
#       38.25.63.10      x.acme.com           # x client host

# localhost name resolution is handled within DNS itself.
#       127.0.0.1        localhost
#       ::1              localhost

127.0.0.1      qa-fx-win2022.ains-inc.com
```

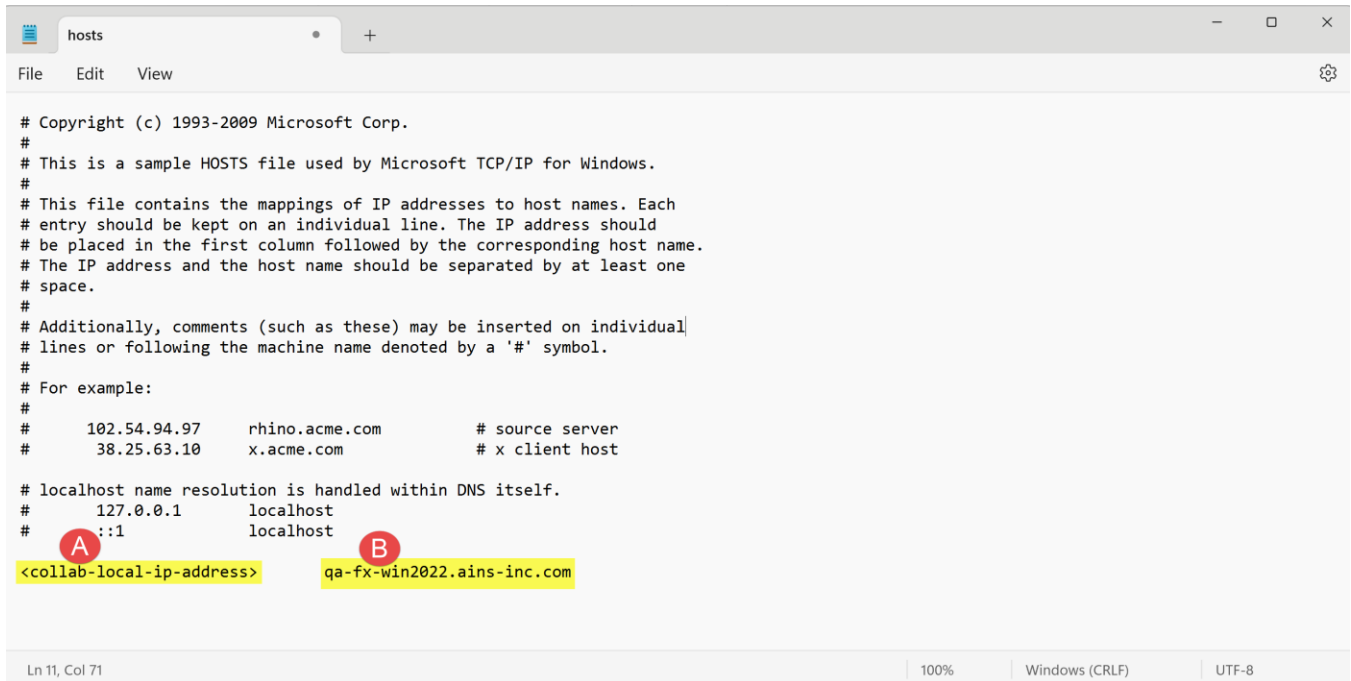
3. Save and close the “hosts” file.

## 7.2.2 Add Binding (Separate Collaboration and Application Servers)

If your Collaboration Portal and application reside on separate servers as your ATIPXpress application, you must add a DNS binding to the “hosts” file as described below:

1. On the ATIPXpress application server, locate and open the “hosts” file (C:\Windows\system32\drivers\etc\).
2. In the “hosts” file, add the text shown below, replacing the part **(A)** with your Collaboration site’s local IP address, and part **(B)** with your qualified DNS name for the Collaboration site:

## Post-Deployment Configuration



```
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97       rhino.acme.com       # source server
#       38.25.63.10       x.acme.com          # x client host

# localhost name resolution is handled within DNS itself.
#       127.0.0.1         localhost
#       ::1               localhost
<collab-local-ip-address>    qa-fx-win2022.ains-inc.com
```

3. Save and close the “hosts” file.