

# eCAGE



## Pre-Installation Manual

v11.0.0

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# eCase 11.0.0 Pre-Installation Manual

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# 1 Introduction

## 1.1 Scope

The purpose of this document is to provide instructions for configuring the eCase database on the application server and configuring Native DMS within the eCase application. Information presented in this document expects the following:

- Windows 2016 R2/2019 Server installed on each server

This document does not provide instructions for installing Windows 2016 R2/2019 R2 Server. Please consult your software vendor for further details concerning this installation. A single server can be used to install eCase and all its components, however it is highly recommended to configure separate servers for the application, database, and repository due to the processing demands of the CPU.

## 1.2 Overview

eCase is a .NET web application running on an IIS Server. eCase is a comprehensive Web-based case management platform that allows users to implement business applications that can automate business process, workflows and interactions between case workers and employees/public. It uses SQL Server database to store all data and content repository to store all documents.

## 1.3 References

The eCase System Requirements Manual was used as a reference in preparing this manual.

## 1.4 Acronyms, Abbreviations, and Definitions

Acronym/Abbreviation	Definition
<b>CPU</b>	Central Processing Unit
<b>GUID</b>	Globally Unique Identifier



Acronym/Abbreviation	Definition
IIS	Internet Information Service
LDAP	Lightweight Directory Access Protocol
NTLM	NT Local Area Network Manager (Microsoft windows network)
PDF	Portable Document Format
RM	Records Management
SMTP	Simple Mail Transfer Protocol
SP1	Service Pack 1
SQL	Structured Query Language
SSL	Secure Sockets Layer
URL	Uniform Resource Locator
XML	Extensible Markup Language

## 2 Getting Started

Before proceeding with the setup it is necessary to do the following:

- Install Microsoft SQL Server 2016/2017/2019 on the database server

For further information regarding the installation of these products please consult your software vendor.

### (!!) Notes:

- The SMTP Server must be configured to relay email messages to other domains.
- For SQL Server 2019, Cumulative Update 8 for SQL Server 2019 (CU8) must be installed

### 2.1 Text and Instructional Formats

Several format conventions have been employed to help the reader distinguish between the various types of instructions included in this guide. The following table illustrates the types of instructions and formatting associated with the text.

Description	Formatting	Example
Consecutive clicks or selections	Arial font, 10 pt, bold with arrowhead between clicks/selections	Select File > New Click Start > Run
Keystrokes	Arial font, 10 pt, bold, enclosed in angle brackets	<Enter>, <Ctrl> + <Alt> + <Del>
Buttons, Program Names, Titles of Windows, Dialog Boxes, Field Names, Text Boxes, List Box References, and Menu Items	Arial font, 10 pt, bold, small caps	ECASE DATABASE SETUP



Description	Formatting	Example
Notes	Arial font, 10 pt bold, underline, all caps,	
Text you are required to type	Courier New font, bold, italics, 12 pt	At the prompt type run

## 2.2 eCase Database Account Requirements

There are three accounts you must setup to configure the application, database, and repository servers. The table below outlines the type of accounts, their purpose, and requirements.

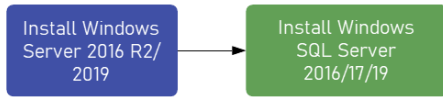
Account	Purpose	Requirement
<b>Application Setup</b>	This user will install and configure the ECASE application and its Services	This account is setup as a Domain/Local User and is a member of the Administrators on server groups
<b>ECASE Database Creation</b>	This user setups the ECASE database user account and grants required permissions	This account is added to the following SQL SERVER security roles for the user that will create the database either in SQL SERVER (Window User) or WINDOWS AUTHENTICATION MODE (NT User):  dbcreator securityadmin



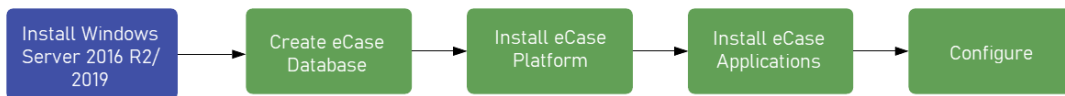
## 2.3 Process Workflow Diagram

The flowchart below displays the workflow of the eCase setup.

### Application/Portal Database Server



### Application/Portal Server





## 3 Full Text Search Options

eCase can be configured to use Windows Search Service or eCase Search Service for full text searching. If Window Search Service is preferred, then enable window search service on eCase Application Server. Otherwise, enable eCase Search Service as described in the later section of this document.

### 3.1 Enable Windows Search Service

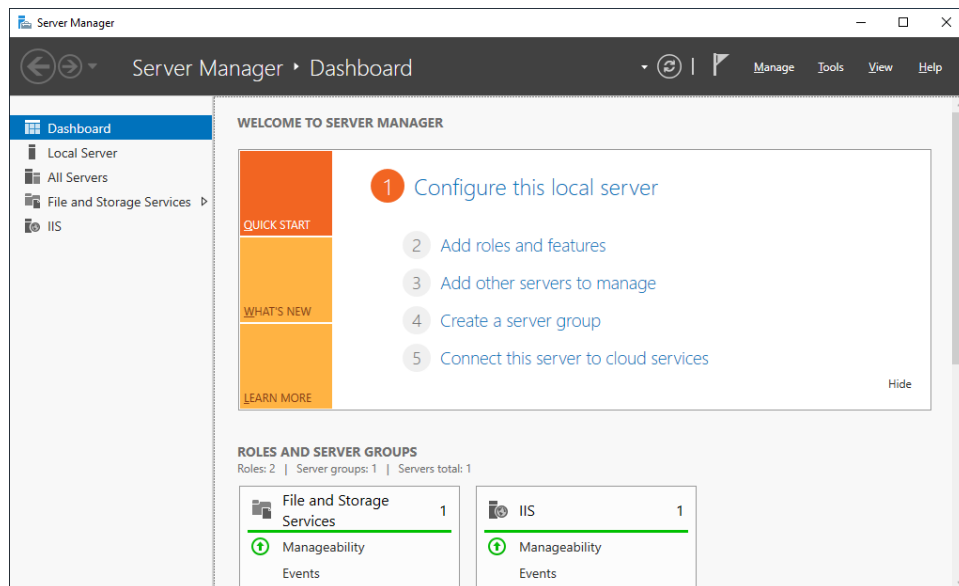
This section describes how to enable the Windows Search Service by configuring the Windows Index Server for the Native Document Management System.

**(!!) Note: The procedural steps in this chapter apply to Windows Server 2019.**

#### 3.1.1 Steps to Enable Windows Search Service

This section provides step-by-step through process of enabling the Windows Search Service.

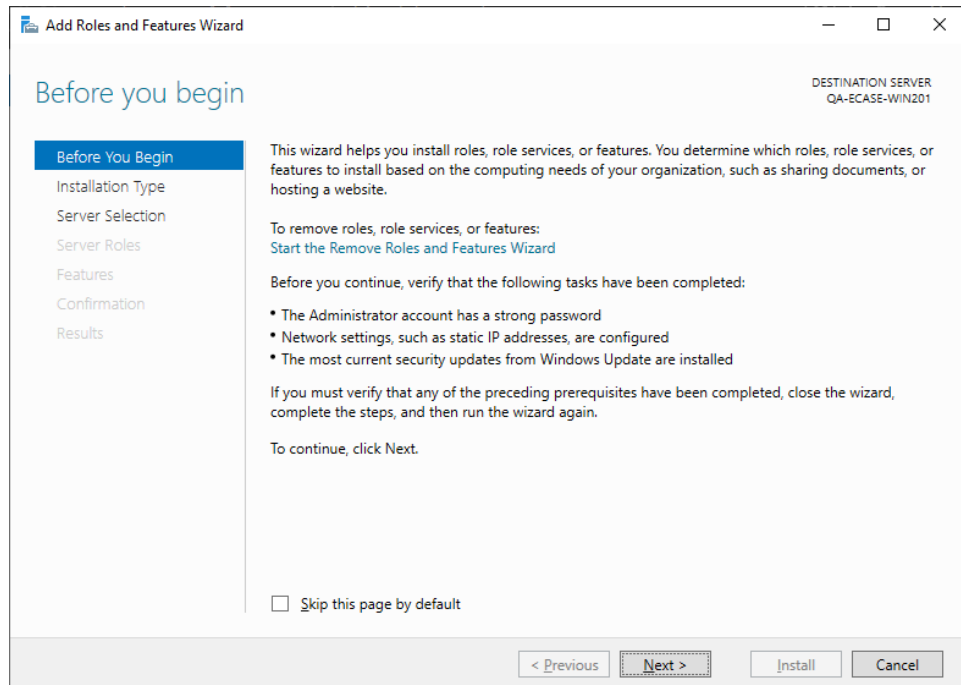
1. Click **Start**, and then click **Server Manager**.



2. Click **Add Roles and Features**, and then click **Next**.



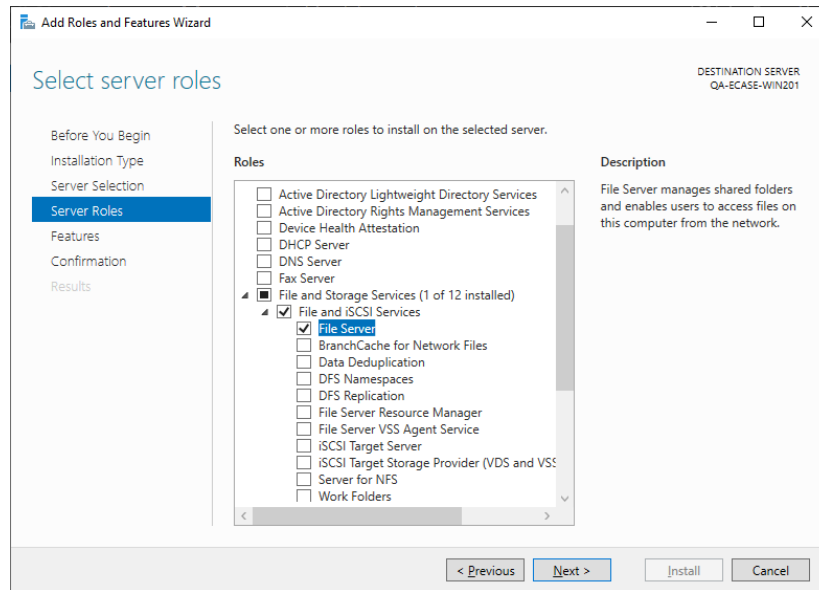
## Full Text Search Options



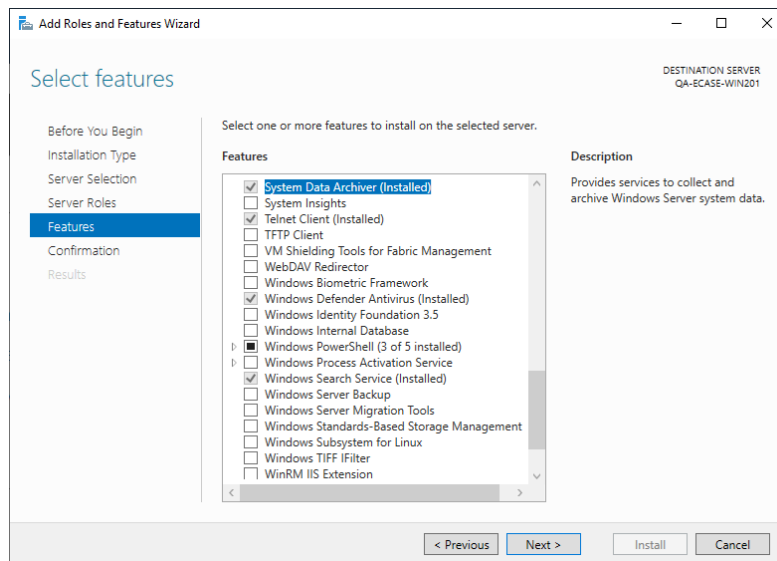
3. In the navigation panel on the right, click **Installation Type**, and then click **Role-based or feature-base installation**.
4. In the navigation panel on the right, click **Server Selection**, click **Select a server from the server pool**, under **Server Pool**, click the name of a server, and then click **Next**.
5. In the navigation panel on the right, click **Server Roles**, and then:
  - a. Select **File and Storage Services** (1 of 12 installed).
  - b. Select **File and iSCSI Services** (0 of 11 installed).
  - c. Select **File Server**.
  - d. Click **Next**.



## Full Text Search Options



6. In the navigation panel on the right, click **Features**, and then select **Windows Search Service**.



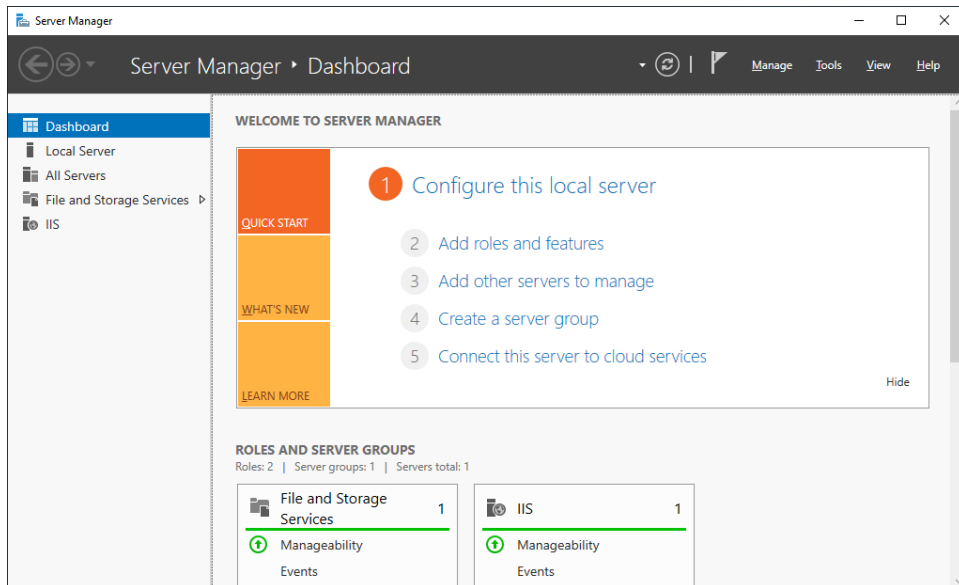
7. In the navigation panel on the right, click **Confirmation**, and then click **Install**.
8. In the navigation panel on the right, click **Results**. After the installation process finishes, click **Close**.



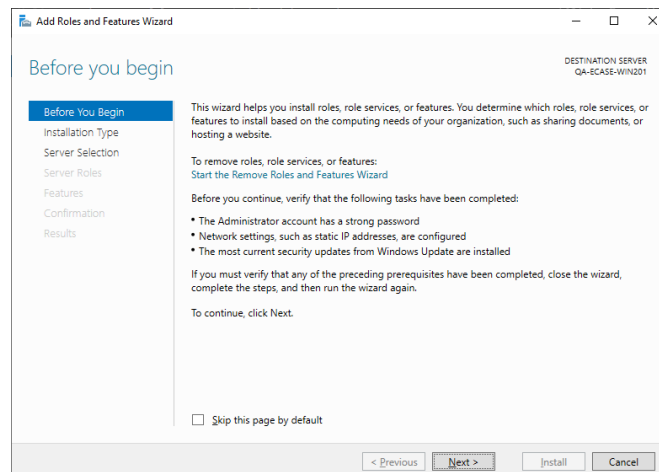
### 3.1.2 Steps to Enable Windows Search Service for Use with .TIFF and .PDF files

This section describes how to configure the Windows Search Service to include .tiff and .pdf files in searches. This feature is disabled by default in Windows Server 2012 R2. Section 3.1 guides you through the process of installing this feature, a process that involves enabling the IFilter feature in Windows Search Service and installing the Adobe PDF IFilter from the Adobe. To enable Windows Search Service:

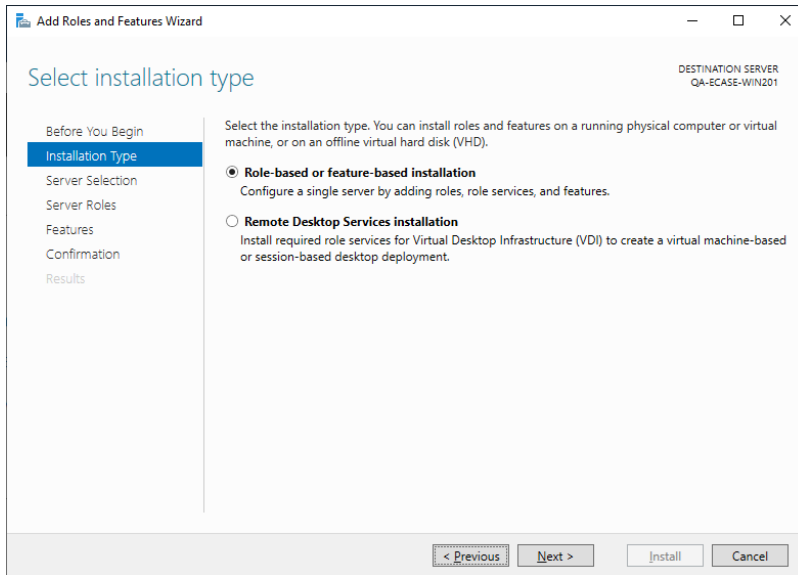
1. Click **Start**, click **All Programs**, click **Administrative Tools**, and then click **Server Manager**.



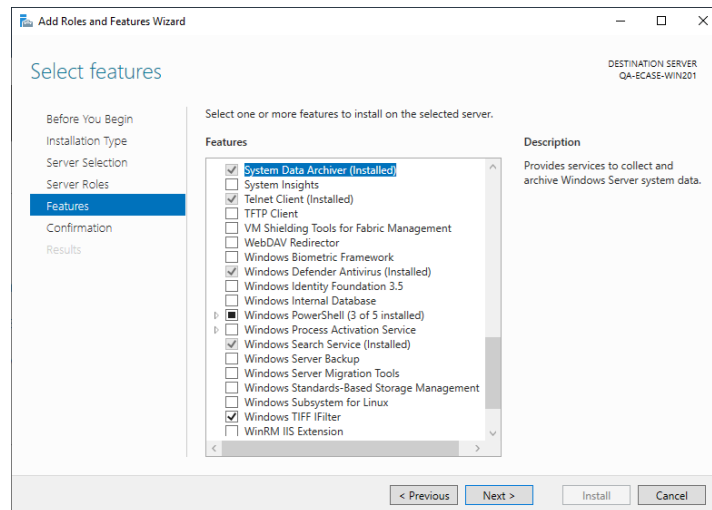
2. Click **Add Roles and Features**, and then click **Next**.



3. In the navigation panel on the right, click **Installation Type**, and then click **Role-based or Feature-based installation**.



4. In the navigation panel on the right, click **Features**, select **Windows TIFF IFilter**, and then click **Install**.



5. Download and install Adobe PDF iFilter from <https://www.adobe.com/support/downloads/detail.jsp?ftplD=5542>
6. After installing Adobe PDF IFilter, restart the Windows Search Service.

### 3.1.3 Document Management System (DMS) File Storage Location

This section describes how to configure the Windows Search Service to include the file storage area location in searches. The steps described below apply to Windows Server 2012 R2. To enable Windows Search Service for the Native Database Mirroring file storage location

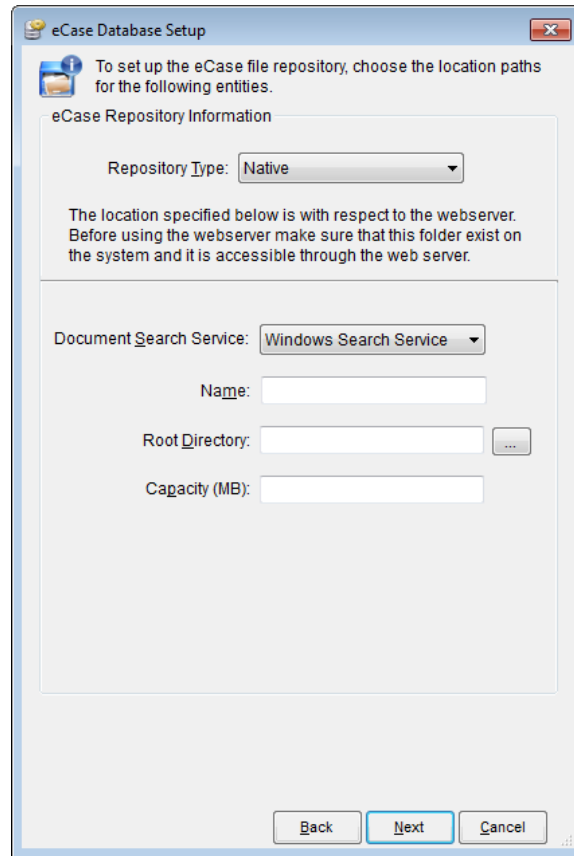
1. Launch the Control Panel, click Index Options, and then click Modify.
2. Remove all locations in the index except the eCase Native DMS file storage location.
3. Ensure the search service account has read access to the eCase Native DMS file storage location.
4. Click Advanced, and then click Rebuild.

## 3.2 Enable eCase Search Service

The eCase Search Service module allows configuring federated searches spanning multiple directories and file locations. It allows searching remote indexes and can be configured on a server that is separate from eCase application and file repository server. This allows it to provide scalable search functionality across all the applications in eCase throughout the enterprise. eCase Search Service is more powerful than the basic, out of the box Windows-based search module. Additionally, there is high scalability and each index can hold up to a terabyte of data. The module can search any number of indexes at a time so larger data storage areas can be divided into multiple storage areas.



## Full Text Search Options



The image shows a Windows-style dialog box titled "eCase Database Setup". It contains a message icon and text: "To set up the eCase file repository, choose the location paths for the following entities." Below this is a section titled "eCase Repository Information". Inside this section, there is a "Repository Type:" dropdown menu with "Native" selected. Below the dropdown is a note: "The location specified below is with respect to the webserver. Before using the webserver make sure that this folder exist on the system and it is accessible through the web server." Further down is a "Document Search Service:" dropdown menu with "Windows Search Service" selected. Below this are four input fields: "Name:", "Root Directory:" (with a browse button "..."), and "Capacity (MB):". At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

The eCase Search Service repository location can be configured in two ways.

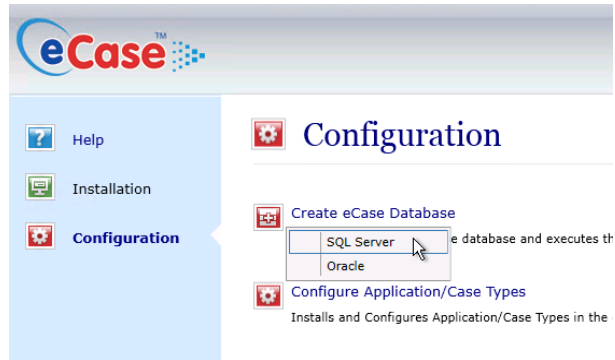
- The Repository location can be configured on the eCase Application Server as a local drive like C:\DMS. If the repository location is configure to a local path, the eCase Scheduler Service must be installed in eCase Application Server.
- Alternatively, the repository location can be configured to any other server, and Repository location should configured as UNC path such as [\\ServerName\DMS](#). If the Repository location is configured as UNC path, the eCase Scheduler service should be configured to the Domain User account, and set the Read, List Folder Contents, Read & Execute permissions to Repository location.

Follow the steps below to enable Search Service:

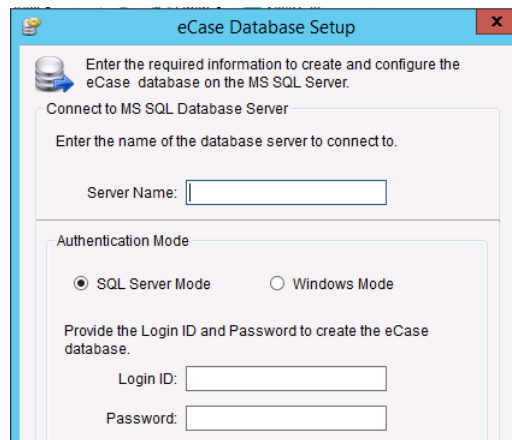
1. Run eCase installer.
2. Go to **Configuration > Create eCase Database > SQL Server**.



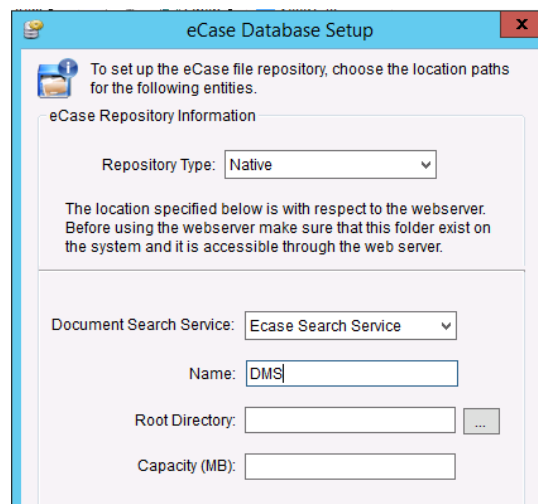
## Full Text Search Options



### 3. Provide DB Info.



### 4. Select Native and eCase Search Service.



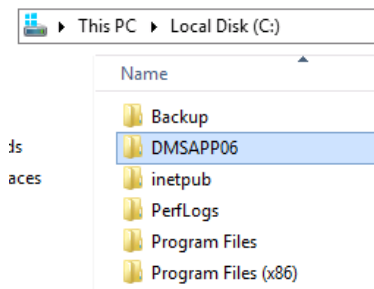
## 3.2.1 Create DMS folder from a different server

### 1. Create DMS folder from a different server.

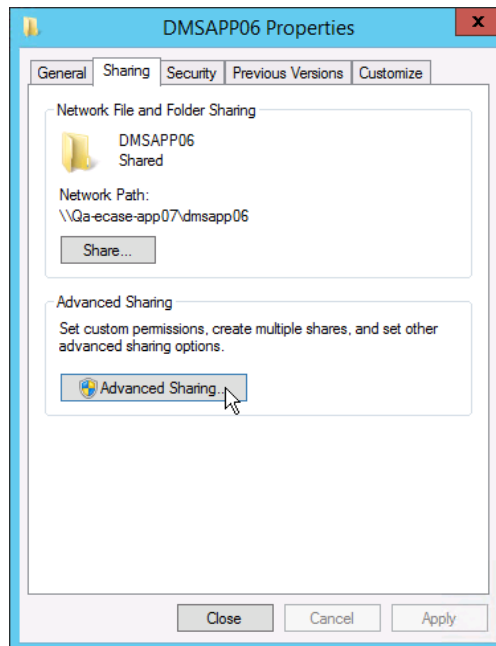




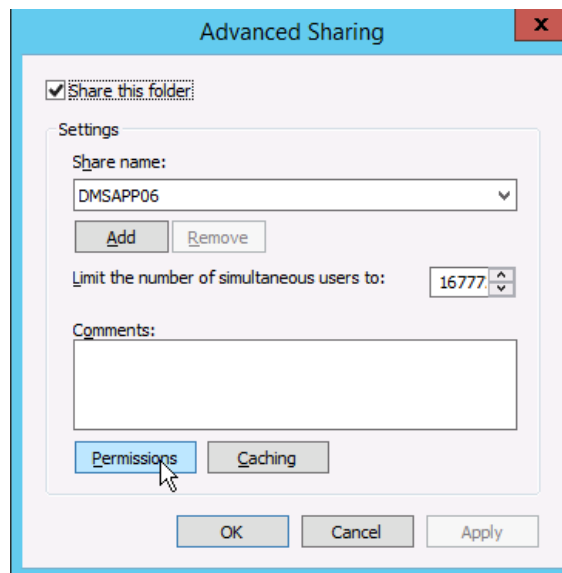
## Full Text Search Options



2. Right-click on **Properties > Sharing > Advanced Sharing**.

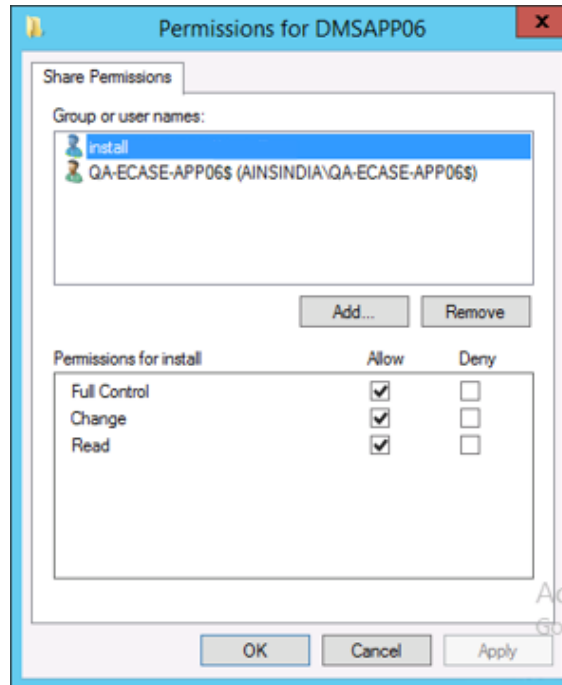


3. Click **Permissions**.

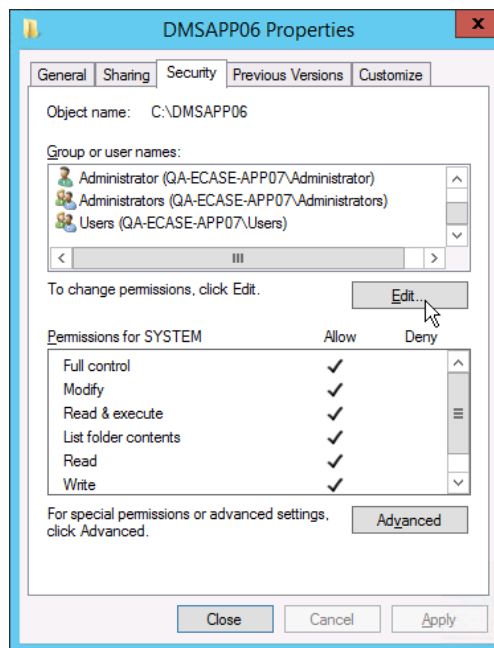


## Full Text Search Options

4. Add main application pool user and application server. Provide full control on both. Once done, click **OK** to save.



5. Now go to the *Security* tab and click **Edit**.



6. Add eCase application server, main application pool users and users for the remote server.

