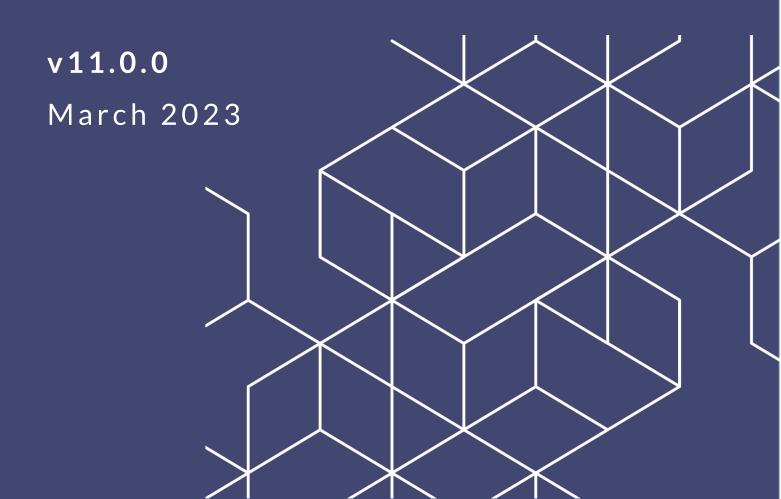


Pre-Installation Manual



eCase 11.0.0 Pre-Installation Manual

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Contents

1	Int	roduction	4
	1.1	Scope	4
	1.2	Overview	
	1.3	References	4
	1.4	Acronyms, Abbreviations, and Definitions	4
2	Ge	tting Started	6
	2.1	Text and Instructional Formats	6
	2.2	eCase Database Account Requirements	7
	2.3	Process Workflow Diagram	8
3	Ful	I Text Search Options	9
	3.1	Enable Windows Search Service	9
	3.1	.1 Steps to Enable Windows Search Service	9
	3.1	.2 Steps to Enable Windows Search Service for Use with .TIFF and .PDF files	. 12
	3.1	.3 Document Management System (DMS) File Storage Location	. 14
	3.2	Enable eCase Search Service	. 14
	3.2	.1 Create DMS folder from a different server	. 16

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
CPU	Central Processing Unit
GUID	Globally Unique Identifier

Introduction

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> + </alt></ctrl></enter>
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

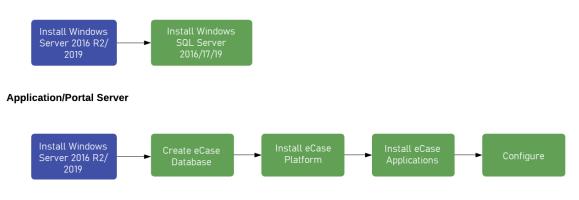
There are three accounts you must setup to configure the application, database, and repository servers. The table below outlines the type of accounts, their purpose, and requirements.

Account	Purpose	Requirement
Application Setup	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
ECASE Database Creation	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



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.

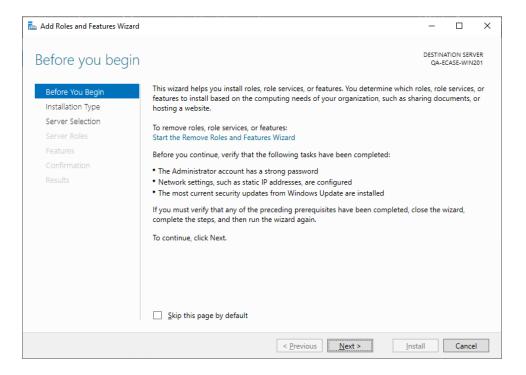
3.1.1 Steps to Enable Windows Search Service

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

1. Click Start, and then click Server Manager.

🔁 Server Manager			- 🗆 X
Server M	lanager • Dash	board 🗸 🕄 🖌 Manage Ic	ools <u>V</u> iew <u>H</u> elp
Dashboard	WELCOME TO SERV	ER MANAGER	^
All Servers File and Storage Services		1 Configure this local server	_
to IIS	QUICK START	2 Add roles and features	
	WHAT'S NEW	3 Add other servers to manage4 Create a server group	
		5 Connect this server to cloud services	Hide
	LEARN MORE		
	Roles: 2 Server group File and Sto	os: 1 Servers total: 1	
	Services Manageabilit	y IIS 1 Manageability	
	Events	Events	~

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-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.

📥 Add Roles and Features Wizard		- 🗆 X
Select server role	S	DESTINATION SERVER QA-ECASE-WIN201
Before You Begin Installation Type	Select one or more roles to install on the selected server.	Description
Server Selection Server Roles Features Confirmation Results	Active Directory Lightweight Directory Services Active Directory Rights Management Services Device Health Attestation DHCP Server Fax Server Fax Server BrackCache for Network Files Data Deduplication DFS Replication DFS Replication File Server SicSI Target Server SiCSI Target Storage Provider (VDS and VSS Server for NFS Work Folders	File Server manages shared folders and enables users to access files on this computer from the network.
	< <u>P</u> revious <u>N</u> ext	> Install Cancel

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

📥 Add Roles and Features Wizard			-		×
Select features	Select one or more features to install on the selected server.			ATION SERV CASE-WIN	
Before You Begin					
Installation Type	Features	Description			
Server Selection	System Data Archiver (Installed)	Provides service			
Server Roles	System Insights	archive Windo	ws Server	system d	ata.
Features	Telnet Client (Installed) TFTP Client				
Confirmation	VM Shielding Tools for Fabric Management				
Results	WebDAV Redirector Windows Biometric Framework Windows Defender Antivirus (Installed) Windows Defender Antivirus (Installed) Windows Internal Database Windows NewerShell (3 of 5 installed) Windows PowerShell (3 of 5 installed) Windows Search Service (Installed) Windows Search Service (Installed) Windows Search Service Storage Management Windows TIFF Filter Windows TIFF Filter Window SIFF Filter Window Steven Portuge				
	< Previous Next	> In	stall	Cance	:I

- 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**.

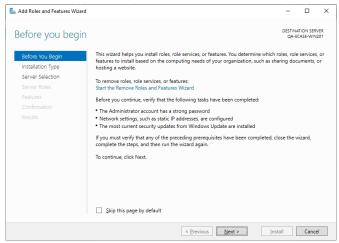
3.1.2 Steps to Enable Windows Search Service for Use with .TIFF and .PDF files

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.

🚡 Server Manager			– 🗆 ×
Server Ma	anager • Dashboard	• 🕲 I 🧗	<u>M</u> anage <u>T</u> ools <u>V</u> iew <u>H</u> elp
Dashboard Local Server	WELCOME TO SERVER MANAGER		/
All Servers File and Storage Services ▷	1 Config	gure this local server	
to IIS		roles and features	
	WHAT'S NEW	l other servers to manage ate a server group	
	5 Con	nect this server to cloud services	Hide
	ROLES AND SERVER GROUPS Roles: 2 Server groups: 1 Servers total: 1		
	File and Storage 1		
	Manageability Events	Manageability Events	

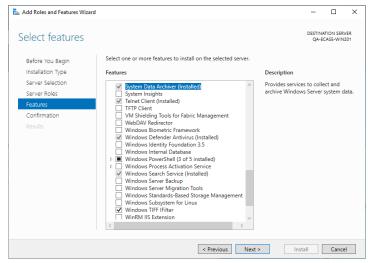
2. Click Add Roles and Features, and then click Next.



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

🚡 Add Roles and Features Wizard		-		×
Select installation	type		FION SERVE ASE-WIN20	
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	 Select the installation type. You can install roles and features on a running physical machine, or on an offline virtual hard disk (VHD). Role-based or feature-based installation Configure a single server by adding roles, role services, and features. Remote Desktop Services installation Install required role services for Virtual Desktop Infrastructure (VDI) to create a v or session-based desktop deployment. 	·		
	< <u>Previous</u> <u>Next</u> >	all	Cancel	

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 <u>https://www.adobe.com/support/downloads/detail.jsp?ftpID=5542</u>
- 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.

🔗 eCase Database Setup				
To set up the eCase file repository, choose the location paths for the following entities.				
eCase Repository Information				
Repository Type: Native				
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.				
Document Search Service: Windows Search Service				
Na <u>m</u> e:				
Root Directory:				
Ca <u>p</u> acity (MB):				
<u>B</u> ack <u>N</u> ext <u>C</u> ancel				

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 <u>\\ServerName\DMS</u>. 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.

eCase >	
👔 Help	📴 Configuration
InstallationConfiguration	Create eCase Database SQL Server Coracle Configure Application/Case Types Installs and Configures Application/Case Types in the

3. Provide **DB Info**.

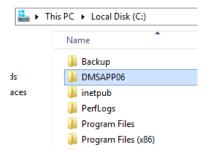
eCase Database Setup				
Enter the required information to create and configure the ecase database on the MS SQL Server.				
Enter the name of the database server to connect to.				
Server Name:				
Authentication Mode				
SQL Server Mode O Windows Mode				
Provide the Login ID and Password to create the eCase database.				
Login ID:				
Password:				

4. Select Native and eCase Search Service.

eCase Database Setup					
To set up the eCase file repository, choose the location paths for the following entities. eCase Repository Information					
Repository Type: Native					
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.					
Document Search Service: Ecase Search Service 🗸					
Name: DMS					
Root Directory:					
Capacity (MB):					

3.2.1 Create DMS folder from a different server

1. Create DMS folder from a different server.



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

DMSAPP06 Properties					
General Sharing Security Previous Versions Customize					
Network File and Folder Sharing DMSAPP06 Shared Network Path: \\Qa ecase-app07\dmsapp06 Share					
Set custom permissions, create multiple shares, and set other advanced sharing options.					
Close Cancel Apply					

3. Click Permissions.

Advanced Sharing				
✓ Share this folder				
Settings				
S <u>h</u> are name:				
DMSAPP06 V				
Add Remove				
Limit the number of simultaneous users to: 16777. \sim				
Comments:				
Permissions Caching				
OK Cancel Apply				

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

Permissions for DMSAPP06							
Share Permissions							
Group or user names:	Group or user names:						
👗 install							
QA-ECASE-APP06\$ (AINSINDIA\QA-ECASE-APP06\$)							
		-	- 1				
	Add	Remove	- 1				
Permissions for install	Allow	Deny	_				
Full Control	✓						
Change Read	>						
ОК	Cancel	Apply					

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

DMSAPP06 Properties							
General Sharing	Security	Previous Versi	ions Custo	omize			
Object name: C:\DMSAPP06							
Group or user names:							
Administrator (QA-ECASE-APP07\Administrator) Administrators (QA-ECASE-APP07\Administrators) Users (QA-ECASE-APP07\Users)							
<		Ш		>			
To change permissions, click Edit.							
Permissions for S	YSTEM		Allow	Deny			
Full control			\checkmark	^			
Modify			~				
Read & execut	-		~	≡			
List folder cont	ents		~				
Read			~	~			
For special permissions or advanced settings, Advanced							
	Clo	se C	ancel	Apply			

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