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Application Installation Manual

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eCASE 11.2.0 Application Installation Manual

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1 Introduction

In this installation manual, you will receive step-by-step instructions on how to install eCASE. If you are a Windows System Administrator, this manual was primarily written with you in mind. However, if you instead hold one of the IT positions listed below, or perform duties related to one or more of those IT positions, then this manual is also intended for you.

- Database Administrator
- Development Manager
- IT Technical Writer
- IT Project Manager
- Software Engineer
- Software Tester

A major goal of the *eCASE Installation Manual* — in addition to guiding you through a successful installation — is to provide supplemental information in appendices about eCASE that you will find useful and time saving.

This document does not cover the System Requirements, we strongly recommend that you review System Requirements document before installation to understand about eCASE deployment architecture and server requirements. The system requirements for the required servers referred in this document are explained in System Requirements document.

1.1 Scope

The information presented in this manual covers how to install eCASE Version 11.1.0, onto the Application Server in a Windows Server, Network Operating System (NOS) environment. Given that certain components are essential in completing the installation, topics covered include the following:

- Configuring the database server for use with eCASE
- Configuring the file repository server for use with eCASE

This manual does not provide instructions about installing Windows Server NOS. For installation details, please consult the appropriate Windows Server installation documentation, or your software vendor.

1.2 Overview

eCASE is a robust, web application that helps organizations to create case management applications through low code approach. In other words, eCASE helps organizations to automate their business processes by automating the entire lifecycle of a workflow, a process referred to as a case.

1.3 References

The following resources are used as references in preparing this manual:

- eCASE System Requirements Manual
- eCASE Prerequisites Installation Manual

1.4 Installation Prerequisites

Ensure the following software applications are installed on the server on which you plan to install eCASE:

- .NET Framework version 4.8
- IIS version 8.5 or later

Ensure that the SMTP server is configured, so that emails can be relayed to intranet and internet domains.

(!!) Notes:

- Although you can install eCASE web application, eCASE Admin application, the database, file repository and the scheduler service on the same server, distributing them on separate servers is highly recommended due to their processing demands on the CPU. This installation approach helps eCASE and its essential components to achieve higher levels of performance. Please refer to System Requirements document to understand about eCASE deployment Architecture.
- For information about how to determine which .NET Framework is installed on your server, direct your web browser to the following URL:

https://msdn.microsoft.com/en-us/library/hh925568(v=vs.110).aspx

 For information about downloading and installing .NET Frameworks, direct your web browser to the following URL:

https://msdn.microsoft.com/en-us/library/5a4x27ek(v=vs.110).aspx

2 Step 1: Creating the SQL Server Database

This section guides you step-by-step through the process of creating a database for use with eCASE. Before you install eCASE, complete the steps in this section.

The type of database you will create in this section for use with eCASE is a SQL Server Database. Follow the step-by- step procedures outlined below to create the database.

To create the SQL Server Database:

- 1. Double-click the **eCASE** folder, and then double click the **Server** folder.
- 2. Right-click the Setup.exe file, and then click Run as administrator on the shortcut menu.
- 3. The Help Window displays. Click **Configuration** to setup the database.



4. On the task panel of the eCASE *Configuration* window, click **Create eCASE Database**, and then click **SQL Server** on the short-cut menu.

CASE [®]	
Help Installation Configuration	
A Product of AINS, Inc.	

5. In the **eCASE Database Server** dialog box, type the license key in the **License Key** box (if this box is empty), and then click **Continue.**

(!!) Note: The license key is in a file included with the set up CD. If this file is in the same folder as the Setup.exe file, the license key will be entered into the License Key box automatically.

- 6. In the eCASE Database Setup dialog box, do the following:
 - a. Type the server name in the Server Name box.
 - b. Under Authentication Mode, ensure SQL Server Mode (default) is checked.
 - c. Type your SQL Server login ID in the **Login ID** box, and then type password in the **Password** box.
 - d. The SQL Server Login ID is required to have permissions either to create new database for eCASE or get the list of databases to select a blank database for eCASE.
- 7. Click Next.

🔮 eCase Database Setu	р	×
Enter the require case databa	red information to create and configure the se on the MS SQL Server.)atabase Server	
Enter the name of the	ne database server to connect to.	
<u>S</u> erver Name:	eCase DB Server	
Authentication Mode	9	
SQL Server M	lode O <u>W</u> indows Mode	
Provide the Login database.	D and Password to create the eCase	
Login ID:	sa	
Password:	****	
	<u>N</u> ext <u>Cancel</u>	

- 8. If you are creating a new database, do the following:
 - a. Select "Database Name" option and enter the database name
 - b. Enter the SQL Server Login ID/Password created and assigned as database owner for new database.
 - c. Check the Configure Repository check box.
 - d. Click Next.

🔗 eCase Database Setup		×
Enter the databas created in the spe Create Database	e name, user login and password to be cified text boxes.	
Enter the database na	me to create	
Database Name:	eCaseDB	
○ Select <u>D</u> atabase:	eCaseDB \lor	
Enter the login ID ar	d password to access the database.	
<u>L</u> ogin ID:	eCaseUser	
Password:		
	<u>Enforce Password Policy</u>	
	Back Next Cancel	

- 9. If you are using an existing blank database, do the following:
 - a. Use the *Select Database* drop-down menu to select a blank database created by your DBA.
 - b. Click **Next** to configure Repository.
- 10. Please select Repository Type: Native or SharePoint.

🔐 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 ~	
Name:	
Root Directory:	
Capacity (MB):	
Back Next Cancel	

- 11. Select Document Search Service option for Native Repository.
 - a. If **Windows Search Service** selected, you have to install Windows Search Service on eCASE Application server and Repository root directory location should be configured on eCASE Application Server in local drive (For example, D:\DMS).
 - b. If eCASE Search Service selected, Repository root directory location can be local or a network location (For example, remote file repository location on Server_Name01 will be configured as, \\Server_Name01\DMS)
- 12. Enter the File Storage Area **Name**, **Root Directory** (local drive or network location as described above) and **Capacity** in MB. If Root Directory is:
 - a. Local Path: Install eCASE Scheduler on eCASE Application Server when eCASE Search Service selected.
 - UNC Path: Install eCASE Scheduler either on eCASE Application Server or on a different server. Configure the service with a domain user account and set the Read, List Folder Contents, Read & Execute permissions to Repository location. To configure eCASE Scheduler Service user account refer the eCASE Scheduler Configuration topic.
- 13. Click Next to Configure eCASE Authentication and System Account details.

Step 1: Creating the Database

🔮 eCase Database Setup	×
Enter the Admin login det	ails in the specified text box.
Admin Login Details	
Authentication Details	
Authentication	Forms ~
Membership provider:	Database ~
System Account Details A system account will be created processes and email service. Plea	automatically to run eCase background ase enter details for this account.
Email:	user@ains.com
A default login will be created to m enter the 'Admin' login details. Login:	Anage the eCase application. Please
Password:	****
Confirm Password:	****
First Name:	Admin
Last Name:	Admin
Email:	user@ains.com
Time Zone:	(UTC-05:00) Eastern Time $ \smallsetminus $
	Back Next Cancel

Field Name	Description
eCASE Login Mode	Forms – Standard level of access for the eCASE application; this is the default option.
	Single Sign On – Allows the user to automatically log into eCASE without prompting for credentials.
	eAuthentication – An authentication service provided by a proxy/remote server to other distributed servers, on the internet or an intranet; users must submit requests to obtain login/logout credentials.

Field Name	Description
Membership Provider	Database – Login credentials will be stored in the eCASE database; this is the default option.
	LdapMembershipProvider – Login credentials will be stored and verified by the LDAP server; this option must coincide with the Portal application.
Login	The unique identifier that verifies the Admin user's identity; this system administrator user manages the eCASE application.
Password	The security credential associated with the Admin user to gain access to the application.
Confirm Password	Same as above.
First Name	The first name of the Admin user.
Last Name	The surname of the Admin user.
Email	The email address for the Admin user.
Time Zone	The region that has a uniform standard time; the current time zone is selected by default.
LDAP Server Name	The name of the LDAP server.
Service User Name	The identifier given to a user that has access to the LDAP server entered as Server name/User Name.
Service User Password	The security credential associated with the Service User.

Field Name	Description
Domain	The name of the IP resource to access the database server.
eAuthentication ID	An electronic authentication identifier for the Admin user; the user must submit a request to obtain an ID.
eAuthentication Log Out URL	A URL that logs out an authenticated user from the server with the specified callback method and user state; the user must submit a request to obtain the web address.

14. In the **Organization and fiscal year configuration details** dialog box, fill out the boxes with the requested information, and then click **Next**.

🔗 eCase Database Setup	×
Enter the organization and fiscal year configuration details in the specified text boxes.	
Configuration Organization Information	
Organization Name: AINS, Inc.	
Office Name: AINS_HQ	
Office Code: 123	
Fiscal Year Information	
Current Fiscal Year: 2019 ~	
Fiscal Year Starts: 10/01/2018	
Fiscal Year Ends: 09/30/2019	
Note: Click on the drop down arrow to invoke the Calendar.	
SMTP Server Information	
SMTP Server Address: 10.0.0.0	
SMTP Server Port No: 25	
Back Next Cancel	

15. When you receive the "Ready to Setup the eCASE database" message, click Finish.

ip Progress	1
Component	Status
Create Database	Pending
Execute Script	Pending
eCase Tables	Pending
eCase Default Data	Pending
Portal Data	Pending
eCase ZipCode Data	Pending
eCase Procedures	Pending
eCase Miscellaneous	Pending
Configure Organization Details	Pending
Configure Office Details	Pending
Configure Fiscal Year	Pending
Create Admin User	Pending
Create Document Library	Pending
Update Configuration Details	Pending
Update Processes References	Pending

16. When you receive the confirmation message, click **OK**.

3 Step 2: Installing eCASE

eCASE is installed on the Microsoft Internet Information Services (IIS) web server.

3.1 Install eCASE

- 1. Go to **eCASE** folder, and then open the **Server** folder.
- 2. Right-click the Setup.exe file, and then click Run as administrator on the short-cut menu.
- 3. On the navigation panel of the eCASE Help window, click Installation.



4. On the task panel of the eCASE Installation window, click Install eCASE Application.



5. In the **eCASE Application Server** dialog box, type the license key in the **License Key** box (if this box is empty), and then click **Continue**. The **Set up new eCASE application** option selected by default.

(!!) Note: The license key is in a file included with the set up CD. If this file is in the same folder as the Setup.exe file, the license key will be entered into the License Key box automatically.

- 6. Read the Welcome to the eCASE Installation Wizard dialog box, and then click Next.
- 7. Read the Software License Agreement dialog box, click **I accept the terms in the License Agreement** (default), and then click **Next**.

🐻 eCase Setup			×
End-User License Agreement			
Please read the following license a	agreement carefully		
			^
SOFTWARE	LICENSE AGRE	EMENT	
NOTICE TO USER:			
THIS IS A CONTRACT. BY (#) LICENSES OF (FOIAXPI	SIGNING THIS AG	REEMENT NUMBER	
REDACTXPRESS, SCANXP	RESS, ECASE) SO	FTWARE, YOU	
AGREEMENT.	AND CONDITIONS	OF THIS	
	EMENT CADECU	IN AT THE END YOU	
WILL BE ASKED TO ACC	EPT THIS AGREE	MENT: OR, IF YOU DO	~
O			
O I accept the terms in the Licen	se Agreement		
I do not accept the terms in th	e License Agreement		
Advanced Installer			
	< Back	Next > Cano	

(!!) Notes:

- The Next button remains disabled until the option to accept the license agreement is selected.
- The Reset button sets the default to I do not accept the terms in the License Agreement.
- 8. In the User Information dialog box, do the following:
 - a. In the **Full Name** box, type your first name and last name.
 - b. Optional: In the **Organization** box, type the name of the organization that you work for.
 - c. In the **Product Serial Number** box, type the eCASE application serial number (if this box is empty).
 - d. Ensure **Everybody** who uses this computer is checked, and then click **Next**.

👼 eCase Setup	-		×
User Information			
Enter the following information to personalize your installation			
Eul Name:			
Organization:			
Product Serial Number:			
The settings for this application can be installed for the current user or share this computer. You must have administrator rights to install the Install this application for:	or for all us settings fi	ers that or all users	5.
Only for me			
 Everybody (all users) 			
Advanced Installer			
< Back Nex	d >	Cano	el

- 9. In the **Destination Folder** dialog box, click **Next** to accept the default folder in which to install eCASE, or click **Browse** to choose a folder of your choice.
- 10. In the Select Features dialog box, click Next to install all features of eCASE.

(!!) Note: eCASE OData Services and eCASE SOAP Services are not required unless integrations with external systems are required. eCASE Application, eCASE Admin, and eCASE Scheduler Service must be installed. They can be deployed on same server or on different servers in production environments to meet the performance requirements.

👼 eCase Setup		>	<
Select Features Please select which features yo	ou would like to install		
Click on the icons in the tree be	elow to change the way	r features will be installed.	_
Case Installation eCase Ap eCase Ap eCase Ad v eCase Ad	n plication min DAP Services Data Services	Description This feature requires 2GB on your ard drive. It has 5 of 5	
Case Sd	heduler Services s	subfeatures selected. The subfeatures require 1.77GB on your and drive.	
Location: C:\Program Files	(AINS eCase	Browse	
wuyai lugu ji buailor.	< <u>B</u> ad	k <u>N</u> ext > Cancel	

11. In the Ready to Install the Application dialog box, click **Next**.

- 12. When the **Updating System** dialog box appears, let the installation process run to completion. (This process could run for several minutes.)
- (!!) Note: It is highly recommended that you let the installation process run uninterrupted.
- For information about uninstalling eCASE, see Appendix D.
- **13.** When the **eCASE Database Configuration** dialog box appears, click **Close**. The **eCASE Database Configuration** dialog box appears if you selected at least one feature during the installation process. You can skip filling out the **eCASE Database Configuration** dialog box at this time. You can configure the database in the next section.

eCase Database Configuration	-		\times
Configuration			
Enter the required information to config database.	gure the (eCase	
Application/Service: All		\sim	
Database type: SQL Server		~	
Data <u>b</u> ase server name:			
Database <u>n</u> ame:			
<u>W</u> indows Authentica	ition		
Login name:			
Password:			
Column Encryption Key:			
Database connection parameters			
Connection timeout: 30 seconds			
Command timeout: 45 seconds			
Note: All the Applications/Services can be configure and saving the database information.	ed by sele	cting "All"	
Test Connection Save		Close]

14. When you receive the confirmation message, click Finish.

3.2 Verifying the eCASE Installation

After installing eCASE, you must next verify the installation. This section guides you through the verification process.

To verify the eCASE installation:

- 1. On the task bar, click Start > All Programs > Administrative Tools > Internet Information Services (IIS) Manager.
- 2. In the Connections panel, Expand the Start Page > Sites > and Default Web Site.

- 3. Expand the eCASE folder.
- 4. Locate Manage Applications > Browse Application on the right side of the screen.
- 5. Click Browse *:80 (http).
- 6. In the eCASE Login dialog box, type your User Name and Password, and then click Sign In.

GCASE	Δ
Username:	
admin	
Password:	
Sign In	jn li

You are about to access a U.S. Government information system; system usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties; and use of the system indicates consent to monitoring and recording.

- 7. Click Help > About eCASE.
- 8. Make sure the version is correct, then close the screen.
- 9. Exit the application. You have successfully installed and configured eCASE.
- (!!) Note: If you are unable to launch eCASE, try to recreate the database and repository.

4 Step 3 (Optional): Installing eCASE Add-on Modules

eCASE add-on modules are not required unless they are required to meet your business requirements. The following steps are options; you may skip if they do not apply to your application.

4.1 Install eCASE PDF Editor

To install eCASE PDF Editor, please make sure eCASE application is installed, then follow the steps below.

- 1. Open Server folder.
- 2. Run the **Setup.exe** as run as Administrator.



3. Click the Install eCASE PDF Editor under Installation section.

Step 3 (Optional): Installing eCASE Add-On Modules



4. PDFEditor Setup screen appears. Click Next.



- 5. In End-User License Agreement, please accept license details and click Next.
- 6. In Destination Folder screen, click Next.
- 7. At the Ready to Install prompt, click Install.

PDFEditor Setup	×
Ready to Install	
The Setup Wizard is ready to begin the PDFEditor installation	
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	
< Back Install Cano	el

8. The installation progresses. When complete, click **Finish**.

🖟 PDFEditor Setup		Х
CASE [®]	Completing the PDFEditor Setup Wizard	
	Click the "Finish" button to exit the Setup Wizard.	
	< Back Finish Cancel	

4.2 Install eCASE OCR Components

eCASE OCR Components should be installed on the same server where eCASE scheduler is installed. To install eCASE OCR Components, follow the steps below on the eCASE Scheduler server.

- 1. Open Server folder.
- 2. Run the Setup.exe as run as Administrator.

3. Click Installation and click Install eCASE OCR Components.



- 4. When the confirmation message appears, click **Yes** to continue.
- 5. eCASE OCR Components Welcome screen appears. Click Next.
- 6. In User Information screen, please provide the details and click Next.

	unite a scale	-
User Information		
Enter the follow	ing information to personalize your installation	
Eull Name:		
Organization:		
-		
share this computer.	pplication can be installed for the current user or for all users that (ou must have administrator rights to install the settings for all user	s.
The settings for this a share this computer. Install this application	ppication can be installed for the current user or for all users that fou must have administrator rights to install the settings for all user for:	s.
The settings for this a share this computer. 1 Install this application	pplication can be installed for the current user or for all users that 'ou must have administrator rights to install the settings for all user for: Only for me (Administrator)	s.
The settings for this a share this computer. Y Install this application	pplication can be installed for the current user or for all users that 'ou must have administrator rights to install the settings for all user for: Only for me (Administrator) O Everybody (all users)	s.
The settings for this a share this computer. Y Install this application	pplication can be installed for the current user or for all users that 'ou must have administrator rights to install the settings for all user for: Only for me (Administrator) Everybody (all users)	s.
Install this application	pplication can be installed for the current user or for all users that 'ou must have administrator rights to install the settings for all user for: Only for me (Administrator) O Everybody (all users)	s.

- 7. In Destination Folder screen, click Next.
- 8. At the Ready to Install prompt, click Install.
- 9. After the installation completes, click **Finish**.
- 10. After successful installation of eCASE OCR Components, please Configure the OCR in eCASE Scheduler using eCASE Database Configuration.

11. Open eCASE Database configuration and select eCASE Scheduler Service in Application/Service drop down box and then Save the database configuration.

eCase Database Configuration	_		×
Configuration			
Enter the required information to config database.	jure the o	eCase	
Application/Service: All		\sim	
Database type: SQL Server		~	
Data <u>b</u> ase server name:			
Database <u>n</u> ame:			
<u>W</u> indows Authentica	tion		
Login name:			
Password:			
Column Encryption Key:			
Database connection parameters			
Connection timeout: 30 seconds			
Co <u>m</u> mand timeout: 45 seconds			
Note: All the Applications/Services can be configure and saving the database information.	ed by sele	ecting "All"	
Test Connection Save		C <u>l</u> ose]

12. After saving the database details, **eCASE Scheduler Configuration** screen appears. Click the **eCASE Optical Character Recognition Service** checkbox.



13. Click Save and close.

4.3 Install Document Review Management

To install eCASE Document Review Management, please make sure the eCASE application and the scheduler is installed.

To install eCASE Document Review Management:

- 1. Open Server folder.
- 2. Run the Setup.exe as run as Administrator.
- 3. Go to Installation and click Install eCASE Document Review Management.



- 4. Once the wizard launches, click Next to continue.
- 5. Select I accept the terms in the License Agreement. Click Next.
- 6. In User Information screen, please provide your details and click Next.
- 7. In Destination Folder screen, click Next.
- 8. Click Install when prompted.
- 9. The installation begins. After successful installation, click Finish.



- 10. Next, configure the Document Review Management in eCASE Scheduler using eCASE Database Configuration.
- 11. Open eCASE Database configuration and select eCASE Scheduler Service in Application/Service drop down box and then Save the database configuration.

🔗 eCase Database Configuration		_		\times
Configuration				
Enter the required info database.	rmation to config	ure the e	eCase	
Application/Service: All			~	
Database type: SQL Se	erver		~	
Data <u>b</u> ase server name:				
Database <u>n</u> ame:				
□ <u>W</u> ine	dows Authenticat	ion		
Log <u>i</u> n name:				
Password:				
Column Encryption Key:				
Database connection parameter	ers			
Connection timeout: 30	seconds			
Co <u>m</u> mand timeout: 45	seconds			
Note: All the Applications/Service and saving the database in	s can be configure formation.	d by sele	cting "All"	
Test Connection	<u>S</u> ave		Close]

- 12. After saving the database details, **eCASE Scheduler Configuration** screen will appear. Select **Document Review Management** checkbox and **Save** the Configuration and **Close**.
- 13. Click Save and close.

🔗 eCase Dat	tabase Configu	ration	_		×
Configuration	Sign-On Mode	Scheduler Service Confi	guration		
✓ eCase	Optical Chara	cter Recognition Servic	e		
eCase					
Docum	nent Review Ma	nagement			
		-			
Notes Const					
Note: Servi	ces will be disad	ied if they are not installe	d on the s	server.	
		Save	C	lose	

4.4 Enable Find and Redact

To enable Find and Redact, the steps below.

(!!) Note: Before executing scripts below, please make sure that the OCR is installed and configured.

- 1. Copy the **FOIAXpress.Utilities.UDFRegExp.dll** into SQL Server machine and place the dll into C:\temp.
- 2. Then, login to **SQL Server Management Studio** as "SA" and execute the following queries.

```
EXEC sp_configure 'show advanced options' , '1';
GO
reconfigure;
GO
EXEC sp_configure 'clr enabled' , '1'
GO
reconfigure;
GO
```

3. Lastly, register the FOIAXpress.Utilities.UDFRegExp.dll assembly within SQL Server using SQL Server Management Studio by executing the following queries.

GO

CREATE ASSEMBLY RegExP

FROM '*Provide file path*'

GO

CREATE FUNCTION dbo.REGEXP_LIKE(@Input nvarchar(max),@Pattern nvarchar(500))
RETURNS nvarchar(max)

AS

EXTERNAL NAME RegExP.UserDefinedFunctions.REGEXP_LIKE

GO

5 Privileges for eCASE Application Server and Services

The following section lists all applicable directories and their required permissions for the application to communicate with the file repository and load the assemblies. The privileges outlined in the following sections are relevant to eCASE web application and web pages.

5.1 Required Permissions for ASP .NET Process Identify

The security permissions outlined below are specifically for the **ASP.NET Process Identity** (IIS Application Pool Identity). In 8.5, the Application Pool Identity by default is set as the **NETWORK SERVICE** user and as the **Application Pool Identity** user in IIS 8.5 or above.

If eCASE is configured with Single Sign-On Authentication, both the **IIS Application Pool Identity** users and all eCASE users must have the permissions on files and folders listed in the table below.

If eCASE is configured with Forms Authentication, only the **IIS Application Pool Identity** user must have the permissions on the files and folders listed in the table below.

Location	Access type	Comments
%SystemRoot%\Microsoft.NET \Framework\versionNumber\ Temporary ASP.NET Files	Read, List Folder Contents, Read & Execute, Write	This is the location for dynamically compiled files. Beneath this location, application code generation takes place in a discrete directory for each application.

ASP .NET Process Identify Permissions

Location	Access type	Comments
%SystemRoot%\System32	Read, List Folder Contents, Read & Execute	This contains system DLLs loaded by the .NET Framework.
Program Files\AINS eCase\eCase -OR- Program Files\AINS eCase\eCase	Read, List Folder Contents, Read & Execute	This is the location for application files.
%SystemRoot%\Microsoft.NET \Framework\version and subdirectories	Read, List Folder Contents, Read & Execute	ASP.NET must be able to access the system assemblies referenced in the Machine.config file in the CONFIG subdirectory under %SystemRoot%\Microsoft.NET\Fr amework\version\.
Temporary Path	Modify, Read & Execute, ListFolder Contents, Read, Write	All eCASE temporary files are stored in this location.

Location	Access type	Comments
Program Files\AINS eCase\eCase\App_Data -OR- Program Files\AINS eCase\eCase\App_Data	Modify, Read & Execute, List Folder Contents, Read, Write	This location stores dictionary files for Spell Check.
Program Files\AINS eCase\eCase\Images -OR- Program Files\AINS eCase\eCase\Images	Modify, Read & Execute, List Folder Contents, Read, Write	The enterprise logo and eCASE application images will be stored in this location.
Program Files\AINS eCase\Reports	Modify, Read & Execute, List Folder Contents, Read, Write	This is the location where temporary application report files are stored when processed in the application

The following table outlines permissions for client workstations:

Location	Access type	Comments
User profile directory	Modify, Read & Execute, List Folder Contents, Read, Write	eCASE controls will store the temporary files before processing to the application.

5.2 eCASE Scheduler Configuration

If the eCASE Database installed with SQL Windows Authentication mode, the eCASE Scheduler Service user should be the owner of the database. Make sure to install the eCASE Scheduler Service before you start it. The following procedure details how to configure your eCASE Scheduler Service to confirm the identity of users before granting access to operate it.

(!!) Note: The eCASE Scheduler Service user must be a member of the local or domain Administrator group.

5.2.1 Start the eCASE Scheduler Service

1. Click **Start > All Programs > Administrative Tools > Services**. The SERVICES screen opens with the EXTENDED tab in view.

	Services – 🗖 🗙			x		
File Action View	Help					
(+ +) 🖬 🖬 🖸	🗟 🛛 📷 🕨 🖩 🖬 🕨					
Services (Local)	O Continue (La contra					
	Services (Local)	North A	Description	Charles .	Charless Trees	11.1
	eCase Scheduler Service	Name	Description	Status	Startup Type	Lo ^
	Stop the convice	CHCP Client	Registers an	Kunning	Automatic	LO
	Restart the service	Jiagnostic Policy Service	The Diagno	Kunning	Automatic (D	LO
		Jiagnostic Service Host	The Diagno		Manual	Lo
		Diagnostic System Host	The Diagno		Manual	Lo
	Description:	Distributed Link Tracking Cl	Maintains li	Running	Automatic	Lo =
	ecase scheduler service	Section Co	Coordinates	Running	Automatic (D	Ne
		S DNS Client	The DNS Cli	Running	Automatic (T	Né
		eCase Scheduler Service	eCase Sche	Running	Automatic	Lo
		Sterrypting File System (EFS)	Provides th		Manual (Trig	Lo
		Extensible Authentication P	The Extensi		Manual	Lo
		🔍 Function Discovery Provide	The FDPHO		Manual	Lo
		🔍 Function Discovery Resourc	Publishes th		Manual	Lo
		🔍 Group Policy Client	The service	Running	Automatic (T	Lo
		🔍 Health Key and Certificate	Provides X.5		Manual	Lo
		🔍 Human Interface Device Ser	Activates an		Manual (Trig	Lo
		🔍 Hyper-V Data Exchange Ser	Provides a		Manual (Trig	Lo
		Hyper-V Guest Service Inter	Provides an		Manual (Trig	Lo
		Hyper-V Guest Shutdown S	Provides a		Manual (Trig	Lo
		Apper-V Heartbeat Service	Monitors th		Manual (Trig	Lo
		G Hyper-V Remote Desktop Vi	Provides a p		Manual (Trig	Lo
		Hvper-V Time Synchronizat	Synchronize		Manual (Trig	Lo ~
	Extended Standard					
						_

- 2. Locate and select eCASE Scheduler Service.
- 3. Right click **eCASE Scheduler Service** and select **Properties**. The eCASE Scheduler Service Properties window opens with the *General* tab in view.

ReCase Scheduler Service Properties (Local Computer)		
General Log On Recovery Dependencies		
Service name: eCase Scheduler		
Display name: eCase Scheduler Service		
Description: eCase Scheduler Service		
Path to executable: "C:\Program Files (x86)\AINS eCase\Scheduler\bin\ECaseScheduler.exe"		
Startup type: Automatic V		
Service status: Running Start Stop Pause Resume You can specify the start parameters that apply when you start the service from here. Start parameters: Start parameters:		
OK Cancel Apply		

4. Click the **Log On** tab then **This Account**. The password fields become enabled.

eCase Scheduler Se	rvice Properties (Local Computer)		
General Log On Recov	very Dependencies		
Log on as:			
Local System account Allow service to interact with desktop			
○ <u>T</u> his account:	<u>B</u> rowse		
Password:			
<u>C</u> onfirm password:			
	OK Cancel Apply		
	Canobi Apply		

- 5. Enter the user name and password for this account, then confirm the password.
- 6. Click OK.

- 7. If service is currently running, a popup appears. Click **OK**.
- 8. Restart the eCASE Scheduler Service.
- 9. Select **Action Restart** from the menu or right-click the on service name and select **Restart** from the short menu. The **Service Control** window appears detailing the progress to restart the service. The **Status** column should indicate 'Started' once completed.
- 10. Select File > Exit to close the Services screen.

5.2.2 Required Security Permissions for eCASE Scheduler Service User

Location	Access type	Comments
%SystemRoot%\ System32	Read, List Folder Contents, Read & Execute	This location contains system DLLs loaded by the .NET Framework.
%SystemRoot%\ Temp	Full Control	This location used for Web services support.
User profile directory	Read, List Folder Contents, Read & Execute, Write	This location stores the cache files of the Report Scheduler Service.
%SystemRoot%\ Microsoft.NET\Framework\version and subdirectories	Read, List Folder Contents, Read & Execute	ASP.NET must be able to access the system assemblies referenced in the Machine.config file in the CONFIG subdirectory under %SystemRoot%\Microsoft.NET\Fra mework\version\.

Location	Access type	Comments
Program Files\ECASE\Logs -OR- Program Files\AINS eCase\Logs	Modify, Read & Execute, Read, Write	The application error log and configuration files are stored in this folder.
Program Files\AINS eCase\eCase\bin -OR- Program Files\AINS eCase\eCase\bin	Full Control	The application error log are stored in this file.

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6 Sign-On Mode Configuration

After setting up the application server, you can change the **Sign-On Mode** that you originally chose using the **eCASE Database Configuration** utility. The following sections provide instructions on how to change to different Sign-On Modes.

- 6.1 Configure the Application and Access the Sign -On Mode Tab
- 1. Click **Start > All Programs > eCASE**, right-click **eCASE Database Configuration** and select **Run as administrator**. The eCASE Database Configuration window appears. Select the database type, enter the required information, then click **Save**.



eCASE Database Configuration

(SQL Server)



eCASE Database Configuration

(Oracle)

(!!) Note: The Login Name and Password fields are disabled if Windows Authentication is selected for the SQL Server database type.

eCase l	Database Configuration 🛛 🗕 🗖 🗙
Configuration	
Enter the requidatabase.	red information to configure the eCase
Application/Service:	eCase v
Database type:	SQL Server V
Database server name:	qa-ecase-sql12
Database name:	ecasedb
	 Windows Authentication
Login name:	sa
Password:	****
Database connection p	arameters
Connection timeout:	30 seconds
Command timeout:	45 seconds
Note: All the Applications/ and saving the data	Services can be configured by selecting "All" base information.
Test Connection	Save Close

- 2. Once you save the required information for either SQL Server or Oracle, a confirmation message appears.
- 3. Click **Yes** to save the information. Another confirmation message appears. Click **OK**. The **Sign-On Mode** tab displays.

6.2 Change the Sign-On Mode

Select the Sign-On Mode tab. The following window appears. It shows the Sign-On Mode options selected during the database configuration.

(!!) Note: The different Sign-On Modes vary on how users will connect to eCASE and can range from the default username/password connection to a more secure windows domain authenticated connection.

eCase Database Configuration X
Configuration Sign-On Mode
Please choose the Sign-On Mode you want to configure.
eCase Sign-On Mode
Sign-On Mode: Forms 🗸
Membership provider: Database 🗸
Note: You must configure IIS as per the Sign-On Mode which you selected (refer to Installation manuals). Next, you must restart IIS on the eCase application server for the changes to take effect. Details Save Close

1. Click the **Sign-On Mode** drop-down list and select the desired option. Enter the required outlined in **Error!**

🔮 eCase Dat	tabase Configuration	_ _ X
Configuration Sign-On Mode		
Please choose the configure.	e Sign-On Mode you wan	t to
eCase Sign-On Mode		
Sign-On Mode:	Forms	¥
Membership provider:	Forms Single Sign-On	k
Note: You must configure IIS a	eAuthentication SignedRequest SAML SSO	you
selected (refer to Installa	ation manuals). Next, you	must restart

Field Name	Description
Sign On Mode	Forms - Standard level of access for the eCASE application. Single Sign On - Allows the user to automatically log into eCASE without being prompted for login credentials. eAuthentication - An authentication service provided by one remote server to other distributed servers, on the Internet or an intranet; users must submit requests to obtain login/logout credentials.
Membership Provider	Database - Login credentials will be verified and stored in the eCASE database; this is the default option. LdapMembership Provider - Login credentials will be verified and stored on the domain where LDAP server is located.
LDAP Server Name	The name of the LDAP server.
Service User Name	The identifier given to a user that has access to the LDAP server; entered as Server name\User Name.
Service User Password	The security credential associated with the Service User.
Two Factor Authentication	Check the Two Factor Authentication check box, which requires users to submit the client certificates along with login and password. It shows when Sign On Mode is forms authentication. When checked, configure IIS to use SSL for eCASE web application and select "Require" option for client certificate settings. Additional configuration steps required are explained in section – "PIV Certificates as Two Factor Authentication."

Field Name	Description
Client Cert Subject Fields	Specify the keys (For example: CN, OU, O) in client certificate subject for two-factor validation. These key values are compared with Authentication ID field for the user.

- 2. Click **Save**. A message window appears. Click **Yes** to change the Sign-On Mode.
- 3. Click **OK** on the confirmation message.
- 4. Click **Close** to exit the eCASE Database Configuration window.

6.3 PIV Certificates as Two Factor Authentication

Please follow the instructions in this document to configure eCASE Two Faction Authentication with PIV Card. Some organizations may require having a different server for all PIV challenges that is different from application server then it is required to setup second IIS server. In second IIS server, do NOT install eCASE application. In this document, PIV Server (Second Server) is optional, it is required only when your organization policy requires to have a dedicated server. You should ignore PIV Server (Second Server) sections in this document when you are configuring with Single Server option.

In this document Steps 1, 2 and 3 are same for Single Server and Two Servers configurations. Step 4.a is for single server configuration, Steps 4.b, 5 and 6 are for Two Server configuration.

6.3.1 System Requirements for PIV Server (Second Server - Optional)

- Windows 2016 Server with IIS 8.5 server
- Install URL Rewrite and ARR IIS Modules. You can download these extensions from Microsoft web sites.

6.3.2 Step 1: Take Database Backup

- 1. Access eCASE database server.
- 2. Open Microsoft SQL Server Management Studio.
- 3. Right-click on eCASE database and take backup.
- 4. Once completed, proceed to Step 2.

6.3.3 Step 2: Install the Latest Service Pack (if not applied)

- 1. Access the application server where eCASE is installed Administrator.
- 2. Copy the "eCASE v10.1 Service Pack".
- 3. In the main root of the folder, run **Hotfix.exe** as Administrator as shown below.
- 4. Provide the Backup location to take the backup of the Files.
- 5. Click Apply.
- 6. Confirm that eCASE database is backed up.
- 7. Installation wizard runs.
- 8. Once Hotfix is installed successfully, click **OK**.
- 9. Proceed to Step 3.

6.3.4 Step 3: Install PIV Card Authentication Hotfix

- 1. Access the application server where eCASE is installed as Administrator.
- 2. Please add the following entries to the web.config file located in eCASE installed directory: C:\Program Files\ECase\eCase

<location path="Banner/Disclaimer.aspx">
<system.web>
<authorization>
<authorization>
</system.web></location path="NoPIV.aspx"></location path="NoPIV.aspx"

- 3. Thereafter, run eCASE Database Configuration Tool as Administrator.
- 4. Select eCASE for under Application/Service.
- 5. Click Save.
- 6. Go to Sign-On Mode tab.
- 7. Check the Two-Factor Authentication and provide subject given from the SSL Certificate.
- 8. Click Save.

6.3.5 Step 4.a: Install SSL Certificate and Configure IIS (Single Server Option)

- 1. Install Server Certificate into IIS and configure bindings for HTTPS on eCASE Application Server.
- 2. Open the IIS, and configure the following settings:

Appendix A: Sign-On Mode Configuration



3. Click on SSL option above.

connections	CEL Cottings
🔍 - 🔚 🛯 🗖 😽	SSL Settings
Start Page	This page lets you modify the SSL settings for the content of a website or application.
- Application Pools	✓ Require SSL
 ▲ Offices ▲ Default Web Site ▷ appnet_client ▲ Pecase 	Client certificates: O Ignore O Accept
▷ - Admin ▷ - App_Data ▷ - Banner	Require
p - CollabEdit p - CollabEdit p - Content	

4. Reset IIS.

6.3.6 Step 4.b: Install SSL Certificate and Configure IIS (Two Servers Option)

- 1. Install Server Certificate into IIS and configure bindings for HTTPS on eCASE Application Server.
- 2. Open the IIS, and configure the following settings:

Default Web Site aspnet_client case	.NET Authorizat	.NET Compilation	.NET Error Pages	.NET Globalization	비니케 .NET Profile	.NET Roles	.NET Trust Levels	니트 🔊	Application Settings	Connection Strings	Machine Key	Pages and Controls	Providers	Session State	SMTP E-mail	
▷- Admin ▷- App_Data ▷- Banner ▷- bin	IIS Authentic	Authorizat	A	Default	A04	Failed	Handler	HTTP	HTTP	Logging		Modules	Qutput	Request		^
 CollabEdit Content Controls Corres 	Manageme	Rules	compression	Document	Lifer Pages	Request Tra	Mappings	Redirect	Respon	Logging	minic Types	moudies	Caching	Filtering	SSE Settings	~

3. Click on SSL option above.

File View Help	
Connections	SCI Sottings
💐 - 🔚 🖄 🕵	SSL Settings
Start Page	This page lets you modify the SSL settings for the content of a website or application
Application Pools	Require SSL
V 🐻 Sites	Client certificates:
✓ ↓ Default Web Site > ↓ □□ aspnet client	Ignore
✓ → eCase	⊖ Accept
> 🛁 Admin	○ Require
> ····· App_Jata	
> 🛅 Banner	
> - 🛅 bin	

4. Reset IIS.

6.3.7 Step 5: Install SSL Certificate and Configure IIS (Two Servers Option)

- 1. Install Server Certificate into IIS and configure bindings for HTTPS on PIV Server.
- 2. Open the IIS, and create a new web site with name URLRewrite with HTTPS binding.

Site name:		Application poo	d:	
URLRewrite		URLRewrite		Select
-Content Directory				
Physical path:				
C:\inetpub\URLRe	write			
Pass-through aut	hentication			
Connect as	Test Settin	ıgs		
-Binding				
Type:	IP addre	ss:	Port:	
https	- All Unas	signed	▼ 443	
Host name:				
, SSL certificate:				
*.ains.com			View	
✓ Start Web site in	nmediately			
			OK	Cancel

3. Configure the SSL Settings and URL Rewrite rules as follows:

]	.NET Authorization Rules Connection Strings	.NET Compilation	Add .NET Error Pages Pages and Controls	.NET Globalization Session State	.NET Profile	.NET Trust Levels	Application Settings
	Authentication	Authorization Rules	2 Compression	Default Document	Directory Browsing	A04 Error Pages	Failed Request Tracing Rules
	Handler Mappings	HTTP Redirect	HTTP Respo	IP Address and Dom	کی ISAPI Filters	Logging	MIME Types
	Amerika Modules	Output Caching	Sequest Filtering	SSL Settings	URL Rewrite		

4. Set the SSL Settings and Apply:

SSL Settings
This page lets you modify the SSL settings for the content of a Wi Require SSL
Client certificates: C Ignore C Accept © Require

5. Add a Rewrite rule with Request Blocking template to abort application related traffic, except Images and Disclaimer.aspx. Configure the URL blocking rules as shown below. Please make sure type, patterns and ignore case button are configured as shown below.

equestBlockin	gRule1		
latch URL			C
Requested UR	L:	Using:	
Matches the	Pattern	Wildcards	~
Pattern:			
*			Test pattern
✓ Ignore case	e		
onditions			e
ogical groupir	ng:		
ogical groupir Match All	ng: V		
ogical groupir Match All Input	ng: V Type	Pattern	Add.
ogical groupir Match All Input {URL}	rg: V Type Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx	Add
ogical groupir Match All Input {URL} {URL}	rg: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL}	re groups across conditions	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL}	re groups across conditions	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL}	ng: Type Does Not Match the Pattern Does Not Match the Pattern inter groups across conditions	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL}	rg: Type Does Not Match the Pattern Does Not Match the Pattern a a a a b a b a b a c c a c a c c a c c a c c a c c c c c c c c c c c c c	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL} Track captu	ng: Type Does Not Match the Pattern Does Not Match the Pattern a a a b a c c a c a c a c a c c a c c a c c a c c c c c c c c c c c c c	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down
ogical groupir Match All Input {URL} {URL} Track captu erver Variables ction	ng: Type Does Not Match the Pattern Does Not Match the Pattern inter groups across conditions	Pattern */eCase/Banner/Disclaimer.aspx */eCase/Images/*.*	Add Edit Remove Move Up Move Down

6. Add a Rewrite rule with Reverse Proxy template to rewrite the traffic to application server. Click **Add Rule** and enter the application server name to forward request:

Appendix A: Sign-On Mode Configuration

Add Reverse Proxy Rules	?	\times
Inbound Rules Enter the server name or the IP address where HTTP requests will be forwarded:		
eCaseAppserver		
Example: contentserver1		
Enable SSL Offloading		
Selecting this option will forward all HTTPS requests over HTTP.		
Outbound Rules		
Rewrite the domain names of the links in HTTP responses		
Responses that are generated by applications that are behind a reverse proxy can be HTTP links that use internal domain names. These links must be updated to use ex domain names.	nave kternal	
From:		
Example: contentserver1		
To:		
	~	
Example: www.contoso.com		
ОК	Cancel	

(!!) Note: Request Blocking rule should be before Reverse Proxy rule. These rules will ensure only PIV requests are sent to dedicate PIV server and all application requests are sent to eCASE Application server. Second server configuration provides the ability to monitor PIV server traffic and ignore the application traffic.

- 7. Add a Rewrite rule with outbound blank rule template to rewrite the rewrite the response redirect to eCASE app server login.aspx. Click Add Rule and enter the name of the rule as 'redirectoutbound'.
 - a. Select <Create New Precondition...> from the Precondition drop-down.
 - b. Click **Add** in the dialog that appears.

- c. Enter {RESPONSE_STATUS} in the Condition input field and 3[0-9][0-9] in the pattern field. Click **OK**.
- d. Select Server Variable from the Matching scope drop-down.
- Enter RESPONSE_Location as the Variable name. e.
- In the Pattern field enter regex: (.*)//(.*)/(.*)/(Login.*) f.
- In the Action Value box enter the URL: https://<eCaseAppServer>/eCase/{R:4} g.
- h. Click **Apply**.
- Outbound rule should appear as shown below. i.

Edit Outbound Rule	
Precondition:	
edir	 ✓ Edit
Match	
Matching scope:	
Server Variable V	
RESPONSE Location	
Variable valuer	
Matches the Pattern	~
Watches the Pattern v Regular expressions	
Pattern:	
(.*)//(.*)/(Login.*)	Test pattern
☑ Ignore case	
Conditions	$\overline{\mathbf{v}}$
Action	٢
Action type:	
Rewrite \checkmark	
Action Properties	
Value:	
https://qa-ecase2016/eCase/{R:4}	
Replace existing server variable value	

All three rules should be in the order shown below:

🔮 URL Rewrite							Add Rule(s)
Provides rewriting capabilities b Inbound rules that are applied t	ased on rules for the o the requested URL	requested URL address:	address and the conte	nt of an HTTP res	ponse.		Revert to Parent Manage Server V
Name	Input		Match	Patt	ern		View Server Variab
 RequestBlockingRule1 ReverseProxyInboundR 	URL path after '/' . URL path after '/'		Matches Matches	* (.*)			Manage Provider View Rewrite Map View Providers
							Inbound Rules
							Import Rules
							Outbound Rules
							View Preconditio View Custom Tag
<						>	Help
Outbound rules that are applied	to the headers or th	e content of an Match	HTTP response: Pattern	Action Type	Action Value	Stop	
	Proposition 1		(*) ((*) ((*) ()	P	1		

6.3.8 Step 7: Set the Banner Page location (Two Servers Option)

Run the following sql query in eCASE database with proper PIV Server name to set the banner page location:

Update EC_CONFIGURATION

SET CONFIG_VALUE='https://<pivservername>/eCase/Banner/Disclaimer.aspx'

where CONFIG_KEY='BannerPage'

7 Application Maintenance

This section provides instructions for using the Application Maintenance Repair feature. Application maintenance should be performed on the application server and/or the server where eCASE components are installed.

The Repair feature automatically detects missing or corrupt files and copies the missing files or copies the original damaged files into the registry and/or installation destination.

(!!) Note: Preferences stored in the registry may be reset to the default values.

- 1. Right-click the **Setup.exe** file and select **Run as administrator**.
- 2. Click Installation I Install eCASE Application. The eCASE Application Sever window appears.
- 3. Make sure the **Set Up New eCASE Application** option is enabled. Locate the License Key file included with the setup CD if the license key is not already populated then click **Continue**.
- 4. The **Application Maintenance** window appears with the **Modify** option selected. Select **Repair** then click **Next**.

Modify, Repair or Remove installation Select the operation you wish to perform. Image: Modify Allows users to change the way features are installed. Repair	평 eCase Setup	×
Select the operation you wish to perform. Modify Allows users to change the way features are installed. Repair	Modify, Repair or F	
Modify Allows users to change the way features are installed. Repair	Select the operatio	
Allows users to change the way features are installed.	and the second	
Repair	i.	
Repairs errors in the most recent installation state - fixes missing or corrupt files, shortcuts and registry entries.		
Remove	(12)	
Removes eCase from your computer.		
Advanced Installer	Advanced Installer	
< Back Next > Cancel		ancel

5. The Ready to Repair the Application window appears. Click **Repair** to continue.

6. The Updating System window appears and begins the process of repairing and installing components.

🐁 eCase Setup		×
Repairing et	Case	
Please wa	it while the Setup Wizard repairs eCase. This may take several minutes.	
Status:	Copying new files	
Advanced Installer		
	< <u>B</u> ack <u>N</u> ext > Cance	el

7. The following window appears after the update has completed. Click **Finish** to exit the Setup Wizard.

👼 eCase Setup		×
CASE [®]	Completing the eCase Setup Wizard	
	Click the "Finish" button to exit the Setup Wizard.	
	< <u>B</u> ack <u>F</u> inish Cancel	

8 Cleanup Utility

8.1 Cleanup

The **CLEANUP** utility allows users to remove folders, case and application types, choice lists, and documents from the **eCASE** application. To access the utility, follow the steps below:

- 1. Click Start > All Programs > eCASE.
- 2. Right-click on **eCASE Configuration** and select **Run as Administrator**. The eCASE Configuration window appears.
- 3. Click the **Cleanup** tab.

(!!) Note: Cleanup is applicable only when a new Repository is configured.

eCase Configuration	_		x
Cleanup Export Folders			
Select an option from the available list to perform a cleanup.			
Cleanup Types			
 Folder Cleanup 			
Case Type Cleanup			
 Application Type Cleanup 			
○ Choice List Cleanup			
O Documents Cleanup [Select Document Type]	~		
Next		Close	е

8.2 Folder Cleanup

This option will remove folders and data from the eCASE application. Because Folder Cleanup is the first option, it is also the default option.

- 1. Click Next.
- 2. Select one of the options outlined in Table 0-1 then click Next.

(!!) Note: This tool will not copy the folders and its related document data.

Field Name	Description
Folder ID	The unique identifier for a folder.
Received Between	The beginning and ending dates a task/case was received.
Closed Between	The beginning and ending dates a task/case was closed.
Case Types	The type(s) of requests or documents related to cases/tasks.
Application Types	The type(s) of requests or documents related specifically to the application.

Appendix C: Cleanup Utility

%	eCase Configuration	-		x
Cleanup Export Folders				
Select folders t	o delete.			
Folder details				
Folder ID				
Received between	01/08/2016			
Closed between	01/08/2016 🗐 🗸 01/08/2016			
CaseTypes	Service Request			
Application Types	Help Desk			
Note: Enter valid fold To delete all fol	er ID to delete. ders, type * in the Folder ID text box.			
	Back Next		Clos	e

4. Click **Cleanup** to remove the folder and data contained in the folder.

9	eCase Configuration	_ D X
Cleanup	Export Folders	
Clea	nup	
	Click on the Cleanup button to start the cleanup process.	
	Back View Log Cleanup Close	

5. Click **Yes** on the verification message to proceed with the cleanup.



- 6. The Cleanup tab changes to display messaging regarding the cleanup process.
- 7. The following message appears once the cleanup process has ended. Click **OK** to close the message.

8.2.1 Case Type Cleanup

This option removes Case Types from the **eCASE** application.

3. Select the Case Type Cleanup option then click Next.



4. Select from the available list then click **Next**.

Appendix C: Cleanup Utility

X	eCase Configuration	_		x
Cleanup Export Folders				
Select case t	ype to delete.			
Case Type details				
Case Types	Service Request			
	Dack		Class	
	Back Next		Clos	se

5. Click **Cleanup** to clear the selected case types from the application.

%		eCase Co	onfiguration		-	x
Cleanup	Export Folders					
Clea	nup					
	Click on the Clear	nup button to start the	cleanup process	I.		
	Back	View Log	Cleanup	Close		

- 6. Click **Yes** on the verification message to proceed with the cleanup.
- 7. The *Cleanup* tab changes to display messaging regarding the cleanup process.

8. Click **OK** to close the message.

8.2.2 Application Type Cleanup

This option removes Application Types from the **eCASE** application.

1. Select the Application Type Cleanup option then click Next.



2. Select from the available list then click **Next**.

%	eCase Configuration	-		x
Cleanup Export Folders				
Select case typ	pe to delete.			
Case Type details				
Case Types	Service Request			
	Back Next		Clos	e

3. Click **Cleanup** to delete the selected Application Type.

9		eCase Co	onfiguration		-	x
Cleanup	Export Folders					
Clea	inup					
	Click on the Clear	nup button to start th	e cleanup process			
	Back	View Log	Cleanup	Close		
	book		cicanop	0.000		

4. Click **Yes** on the verification message to proceed with the cleanup process.



- 5. The **Cleanup** tab changes to display messaging regarding the cleanup process.
- 6. A confirmation message appears once the cleanup process has ended. Click **OK** to close the message.

8.2.3 Choice List Cleanup

This option removes Choice List(s) from the eCASE application.

1. Select the Choice List Cleanup option and click Next.



2. Make a selection from the available list then click Next. Use the <Shift> or <Ctrl> keys to make multiple selections.

9	eCase C	onfiguration	-		x
Cleanup	Export Folders				
2	Select choice lists to delete.				
Choic	e List				
	Choice List ID	Choice List Name			
►	6	Delivery Mode			
	7	Received Mode			
	8	File Code			
	17	Office			
	18	User			
	19	Folder			
	20	Contact			
		Back Next		Clos	e

3. Click **Cleanup** to delete the selected choice list.

9		eCase Co	onfiguration		- 0	x
Cleanup	Export Folders					
Clea	nup					
	Click on the Clea	nup button to start th	e cleanup process.			
	Back	View Log	Cleanup	Close		
	buok		c.comp	5,000		
L						

- 4. Click **Yes** on the verification message to continue with the cleanup process.
- 5. The *Cleanup* tab changes to display messaging regarding the cleanup process.
- 6. The following message appears once the cleanup process has ended. Click **OK** to close the message.

8.2.4 Documents Cleanup

This option removes Documents from the eCASE application.

1. Select the **Documents Cleanup** option. The list box is enabled.



2. Select for the type of document to remove then click Next.



3. Click **Cleanup** to delete the selected document.

%		eCase Co	nfiguration		-	x
Cleanup	Export Folders					
Clea	nup					
	Click on the Clear	nup button to start the	cleanup process.			
	Back	View Log	Cleanup	Close		

- 4. Click **Yes** on the verification message to proceed with the cleanup process.
- 5. The Cleanup tab changes to display messaging regarding the cleanup process.
- 6. The following message appears once the cleanup process has ended. Click **OK** to close the message.

8.3 Export Folders

The Export Folders feature provides the user with the capability to transfer folders and attachments into the eCASE system based on search criteria. Large quantify of folders can be exported by batch into the system by compressing the folders and its contents into a ZIP file.

- 1. Click Start > All Programs > eCASE.
- 2. Right-click on eCASE Configuration and select Run as Administrator. The eCASE Configuration window appears.
- 3. Click the Export tab.
- 4. Select search criteria from the drop-down list and enter the name of the ZIP file in the available field.

H Select a	Search Cr	iteria and give	the Zip File Ir	nformation to e	xport the folde
Search Criteria					
Search Criteria	Open F	leviews		•	
Zip File Information					
Zip File Name	Open R	leviews 2012			
File Location	C:\eCa	se Documental	tion\Open Re	ivews	Brow
Progress					
Total Folders:					
Exporting					

5. Click **Browse**. The *Browse for Folder* window appears. Select the location to store the ZIP file then click **OK**.

E 🔼 A	dministrator	
	omputer	
± 🚚	Floppy Disk Drive (A:)	
Ξ	Local Disk (C:)	
8	1b7d711351b9977c241f3e74	
8	ab6a9dceb15b63af92a4c566	
۰ E	ATIPXpress	-
E	ATIPXpress Backup	
E 💧	eCase Backup	
. 🖃 🔰	eCase Documentation	
	퉫 Open Reivews	
8	f09b85942163ce515c	
IT A	FOIAXpress	-

6. Click **Export** to continue. A verification message appears indicating the amount of folders to be exported.



7. Click **Yes** to begin exporting folders to the designated destination. The eCASE Configuration window changes to display the progress of the export.

Select a	Lieanup Export Folders	olders.
earch Criteria —		
Search Criteria	a_criteria	
ip File Information		
Zip File Name	search creteria	
file Location	C:\Users\install.AINSINDIA\Desktop	lrowse.
rogress	240	
Lotal Folders: Exporting 52	240	

8. A confirmation message appears once the export completes.



- 9. Click **OK** to close the message and return to the Export Folders tab.
- 10. Click **Close** to exit the eCASE Configuration utility.

9 eCASE Uninstallation

This section provides instructions on uninstalling the eCASE Application from the application server.

9.1 Uninstalling the eCASE Application

The eCASE application can be uninstalled manually or by using the eCASE SETUP WIZARD. If you attempt to uninstall the application using the setup wizard, it will automatically detect the previous installation and redirect you to uninstall the application. The uninstall process occurs on the application server.

(!!) Note: To manually uninstall the application click Start > All Programs > Control Panel > Programs and Features. Select eCASE then click Uninstall. The application will be removed from the server.

- 1. Double-click the eCASE > Server folders.
- 2. Right-click on the SETUP.EXE file and select Run as Administrator.
- 3. Click **Installation** > **Install eCASE Application**. The eCASE Application Server window opens with the Set up new eCASE application option selected.
- 4. Locate the **License Key** file included with the setup CD if the license key is not already populated then click **Continue**.

(!!) Notes:

- To avoid manual selection of the license key, make sure the license key file is in the same folder as the SETUP.EXE file.
- If a previous version of eCASE already exists a verification message will appear. Click Yes
 to uninstall the previous version of the application or click No to exit the uninstall
 process.
- The Windows Installer window appears briefly. After several seconds, the eCASE Setup window appears with Modify selected as the default.
- 5. Select **Remove** and click **Next**. The **eCASE Uninstall** window appears.

Modify, Repair or Select the operation	Remove installation on you wish to perform.
í.,	Hodify Allows users to change the way features are installed.
1	Regair Repairs errors in the most recent installation state - fixes missing or corrupt files, shortcuts and registry entries.
1	Remove Removes eCase from your computer.

- 6. Review the information on the window then click **Next**. The **Updating System** window appears.
- 7. Click **Finish** to close the **eCASE Setup** window once the application is uninstalled.



(!!) Notes:

• The Setup Wizard may detect services that are actively running on the server. When this occurs a message window will appear indicating so. Select the appropriate action to close the message window to resume the uninstallation process.

- It is highly recommended not to interrupt the Updating System process. If you must, click Cancel.
- The eCASE Setup window will appear. Review the information before proceeding then click Exit Setup to stop the uninstall process or Resume to continue with the uninstallation.
- Exiting the uninstall process while the system is updating will not remove the entire application. You must restart the uninstall sequence of steps to completely remove the application from the server.

10 Un-installation Steps for eCASE Add-on Modules

10.1 Uninstall eCASE OCR Components

To uninstall eCASE OCR Components, follow the steps below.

- 1. Open Server folder.
- 2. Run the Setup.exe as Run as administrator.



3. Click Installation and click Install eCASE OCR Components.



4. Click Yes to continue.

OCR Service Setup	\times
This will install OCR Service into your system. Do you want to continue?	
<u>Y</u> es <u>N</u> o	

5. Click Next to continue.



6. Application Maintenance screen will prompt. Select Remove and click Next.
| 🚽 eCase OCR Compor | ents Setup | \times |
|---------------------------------------|---|----------|
| Modify, Repair or Remove installation | | |
| Select the operation | you wan to perform. | |
| š, | Modify
Allows users to change the way features are installed. | |
| 繆 | Regair
Repairs errors in the most recent installation state - fixes
missing or corrupt files, shortcuts and registry entries. | |
| 3 | <u>Remove</u>
Removes eCase OCR Components from your computer. | |
| Advanced Installer | | |
| Autorice a state | < <u>B</u> ack <u>N</u> ext > Cancel | |

7. Click Remove.

孆 eCase OCR Components Setup	×
Remove eCase OCR Components	
You have chosen to remove the program from your computer.	
Click "Remove" to remove eCase OCR Components from your computer. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	
< <u>Back</u> <u>Remove</u> Cancel	

8. Wait for uninstallation to complete.

🔂 eCase OCR Components Setup	
Updating System The features you selected are currently being uninstalled.	S
Removing files	
File: R_FRE.DAT Directory: C:\Program Files (x86)\AINS eCase\Scheduler\DCR Components\	
Time remaining: 1 seconds	
Wise Installation Wizard (R)	
	Cancel

9. Click Finish.

🛃 eCase OCR Components Set	tup	Х
CASE	Completing the eCase OCR Components Setup Wizard	
	Click the "Finish" button to exit the Setup Wizard.	
	< <u>B</u> ack <u>Finish</u> Cancel	

10.2 Uninstall eCASE PDF Editor

To uninstall eCASE PDF Editor, follow the steps below.

- 1. Open Server folder.
- 2. Run the Setup.exe as Run as administrator.



3. Click Installation and click Install eCASE PDF Editor.





4. Application Maintenance screen will prompt. Select **Remove** and click **Next**.

🛃 PDFEditor Setup		\times
Modify, Repair or Remove installation		
Select the operation	you wish to perform.	
	Modify Allows users to change the way features are installed.	
1	Repair Repairs errors in the most recent installation state - fixes missing or corrupt files, shortcuts and registry entries.	
8	Remove Removes PDFEditor from your computer.	
Advanced Installer	< <u>B</u> ack <u>N</u> ext > Cancel	

5. Click Remove.

뤯 PDFEditor Setup	\times
Remove PDFEditor	
You have chosen to remove the program from your computer.	
Click "Remove" to remove PDFEditor from your computer. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	
< <u>Back</u> emove Cancel	

- 6. Wait for uninstallation to complete.
- 7. Click Finish.

🔀 PDFEditor Setup		×
CASE [®]	Completing the PDFEditor Setup Wizard	
	Click the "Finish" button to exit the Setup Wizard.	
	< <u>B</u> ack <u>Finish</u> Cancel	

11 Troubleshooting

11.1 Syntax error while accessing the Folder Tabs

Problem:

Why is a Syntax error being observed while accessing the Folder Tabs?

Solution:

Reset Internet Explorer settings to their default condition.

To reset Internet Explorer settings follow these steps:

- 1. Exit all programs, including Internet Explorer (if it is running)
- 2. Click **Start**, type *inetcpl.cpl* and press **Enter**. The **Internet Options** dialog box appears.
- 3. Click the **Advanced** tab.
- 4. Under **Reset Internet Explorer** settings, click **Reset**. Then click **Reset** again.
- 5. When Internet Explorer finishes resetting the settings, click **Close** in the **Reset Internet Explorer Settings** dialog box.
- 6. Start Internet Explorer again.

11.2 Failed to decrypt using provider'RsaProtectedConfigurationProvider'

Problem:

Failed to decrypt using provider '**RsaProtectedConfigurationProvider**'. Error message from the provider: The RSA key container could not be opened.

Solution:

Execute a command to provide the AppPool account of eCASE.

- 1. Open Command prompt.
- 2. Go to C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727
- 3. Execute aspnet_regiis -pa "NetFrameworkConfigurationKey" "Network Service" by providing the AppPool account of eCASE.

* **Network Service** is the AppPool account of **eCASE** if the AppPool account is **W**INDOWS Domain User account, you have to provide like DOMAIN\UserName.

If the issue persists even after following the above-mentioned procedure, provide the Read, Read & Execute, and List Folder Contents permissions for the Network Service User to inherit the permissions from the parent to all its child objects on the following Path.

C:\ProgramData\Microsoft\Crypto\RSA\MachineKeys

11.3 Default NTFS Permissions and User Rights for IIS

For default NTFS File System Permissions and User Rights for IIS, please *refer to the link below*: <u>https://support.microsoft.com/en-us/help/981949/description-of-default-permissions-and-user-rights-for-iis-7.0-and-later</u>

11.4 Unable to install application by someone other than Initial Installer

Problem:

A user wants to perform a fresh installation of the application and removes the previous installation using the Control Panel, Programs and Features Uninstall function. Once the application is removed a warning message appears when attempting to re-install the application: " eCASE application version (x.x.x.x) has been initially installed by a different user. Please log out and re-login with the aforementioned user account to continue with the installation of version x.x.x.x." ('x' represents the version number).

Solution:

Manually remove the following keys from the registry:

 $\label{eq:heat} HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Installer\UserDataa\S-1-5-21-$

1522637160-2486600271-3587380157-4220\Products\3079D6522DDCB1541B9F9E2910894CB7 HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\ Uninstall\{256D9703- CDD2-451B-B1F9-E9920198C47B}

11.5 Error uploading large attachments

Problem:

Error while uploading large files as attachments into eCASE

Error: System.Net.WebException: The remote server returned an error: (404) Not Found.

Solution:

Follow the steps below to resolve the issue.

- 1. Open IIS Manager by selecting **Start > All Programs > Administrative Tools > Internet** Information Services (IIS) Manager.
- 2. Expand the Server node > Sites > Default Web Site and select eCASE.
- 3. In Feature View, double-click Request Filtering.
- 4. In the Actions pane, click **Edit Feature Settings**.
- 5. In **Edit Request Filtering Settings** window, change the value of **Maximum allowedcontent length (Bytes)**.By default, 30 MB is the size. You can increase to your desired value. Example: Change the value to 52428800, then application will support up to 50 MB.

Edit Request Filtering Settings	? ×
General	
Allow unlisted file name extensions	
Allow unlisted verbs	
Allow high-bit characters	
Allow double escaping	
Request Limits	
Maximum allowed content length (Bytes):	
3000000	
Maximum <u>U</u> RL length (Bytes):	
4096	
Maximum guery string (Bytes):	
2048	
OK Cancel	

(!!) Note: Please restart IIS after you make the required changes.