eCASE

OPEXUS

Portal Installation Manual

v11.2.0

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eCASE 11.2.0 Portal Installation Manual

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Contents

1   Introduction

1.1   Scope

The purpose of this manual is to guide the user through the eCASE Portal installation process. Information presented in this document presumes the following:

- Windows 2016 R2/Windows 2019 Server is installed on the application server.
- eCASE is installed and configured on the application server.

1.2   Overview

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.

eCASE Portal is a website that provides eCASE users the ability to access and submit forms which are generated as folders in eCASE for further processing. eCASE Portal is built by using Microsoft .NET–connected technologies so that it is easy to deploy, customize, and use.

2   Getting Started

2.1   Prerequisites

Before proceeding with the installation, it is necessary to:

- Create and configure the SQL 2016/17/19 database server.
- Install Microsoft .NET Framework 4.8 on the application server.
- Configure the SMTP Server to relay email to the email server when using eCASE Portal. The SMTP server must be configured to relay email messages to other domains.
- Portal Sync is a feature of the eCASE Scheduler service and runs on 4.8 with ADO.NET Data Services Update for .NET Framework 4.8.

2.2   eCASE Portal Database Account Requirements

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

Account	Purpose	Requirement
Application Setup User	This user installs and configures the eCASE Portal application.	This account is setup as a Domain/Local User and is a member of the Administrators Server Groups.
eCASE Portal Database Creation User	This user creates the eCASE database user account and grants the required permissions.	This account is added to the following SQL Server security roles for the user that creates the database either in SQL Server (Window User) or Windows Authentication Mode (NT User): • dbcreator • securityadmin

| Account	Purpose	Requirement
eCASE Portal Database User	This user performs all eCASE Portal application database actions.	This account must be assigned as a member of the db_owner database role for the eCASE Portal SQL Server database.

3 Create the eCASE Portal Database

The purpose of the eCASE Portal database is to collect, store, and organize data in a way that eCASE Portal user can access. This section outlines the procedures to create a database for use with the eCASE Portal application, specifically the SQL Server database type.

(!!) Notes:

- **Please review the database server requirements prior to setting up the database. If the requirements are not met, the database will not function.**
- **Make sure to run the Setup.exe file from the application server.**
- **Install Microsoft .NET Framework 4.8 on the application server.**

1. Open the *eCASE Portal 11.2.0* folder and right-click the **Setup.exe** file.
2. Select **Run as administrator**. The *eCASE Portal Setup wizard* appears.
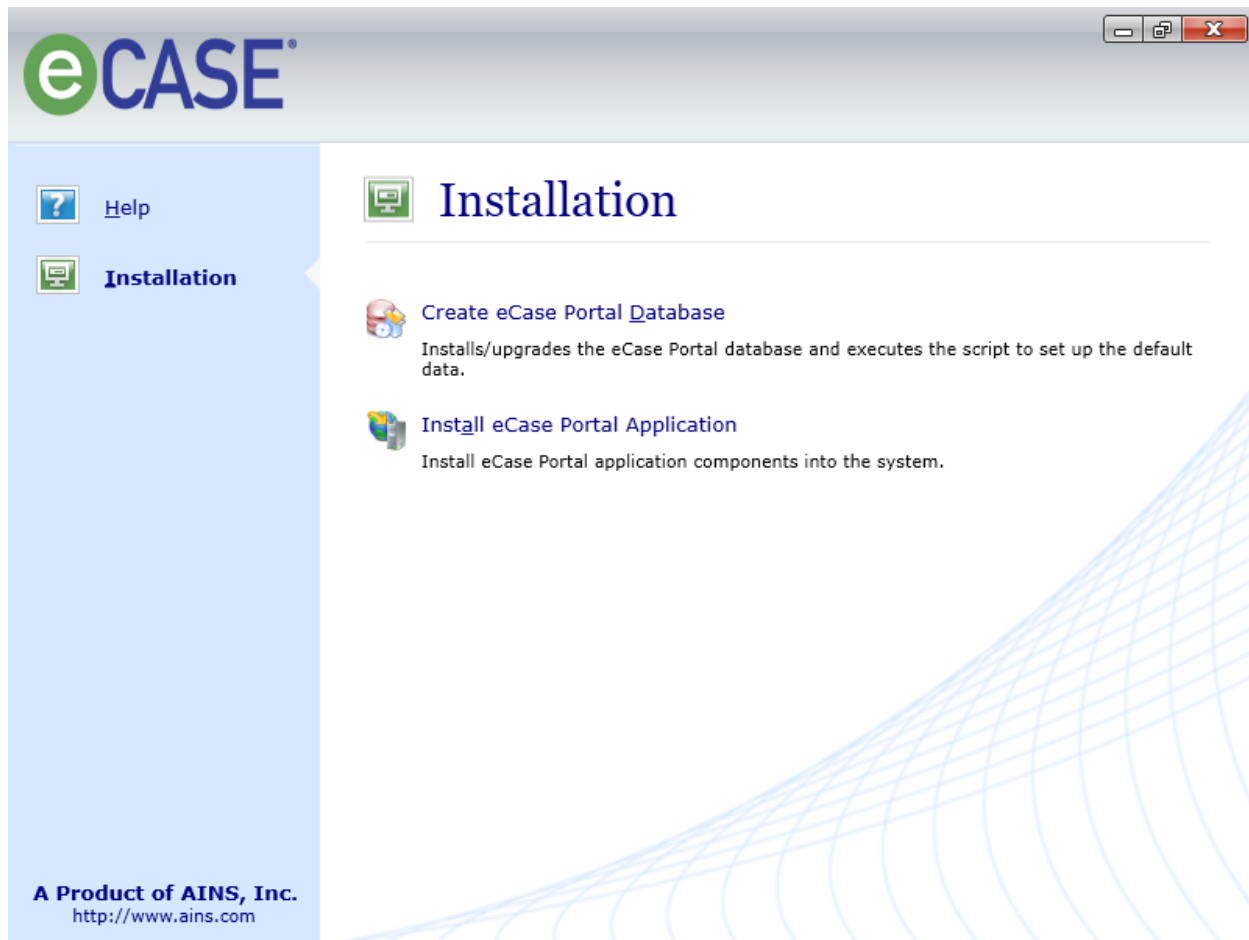
3. Select **Create eCASE Portal Database > SQL Server** for the database type.

Create eCase Portal Database
SQL Server   e Portal database and executes the script to set up the default

4. The *eCASE Portal Database Server* window appears.

5. Ensure the **Set up new eCASE Portal 11.2.0 database** radio button is selected and click **Continue**. The *eCASE Portal Database Setup* window appears.

6. Enter the required information outlined in the table below and click **Next**.

(!!) Note: If Windows Mode is selected as the *Authentication Mode*, enter the Server Name only. The *Domain* and *Windows User* fields are automatically populated based on the current user.

| Field Name	Description
Server Name	The name given to the eCASE Portal database server.
Login Name	The unique identifier for the database owner that manages the database.
Password	The security credential associated with the database owner Login Name used to gain access to the database.

Field Name	Description
Domain	The name of the IP resource used to access the database server.
Windows User	A user with dbcreator and security admin privileges.

7. Enter the required information outlined in the table below and click **Next**.

Field Name	Description
Database Name	The name given to the eCASE Portal database during creation.
Login ID	The unique identifier for a user who has access to the eCASE Portal database.
Password	The security credential associated with the above user to gain access to the database.
Enforce Password Policy	Click this checkbox to enforce the password policy for SQL Server.

8. The *Database Name* and *Login ID* fields are automatically populated as **PortalDB** and **PortalUser**, respectively. Users can accept the preset or change the database and login names, if desired. Enter the **Password** for the user account in the *Password* field and click **Next**.

9. The *Setup Progress* window appears and displays a list of components to configure. Click **Finish** to continue setting up the eCASE Portal database.
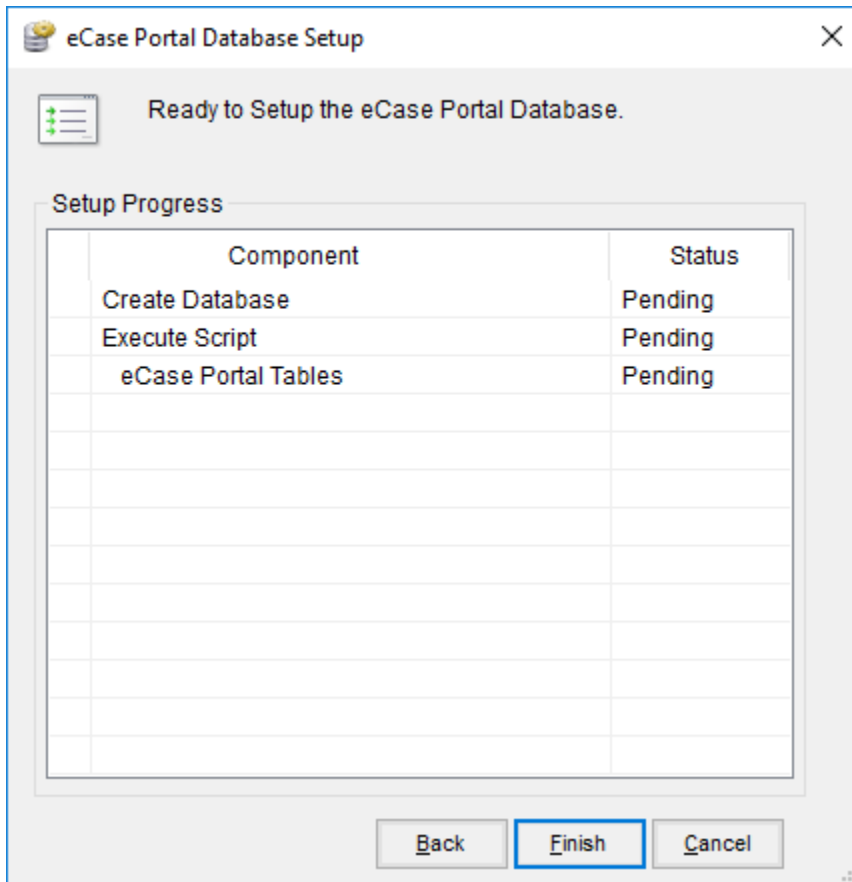
10. A confirmation message appears after the database has been created. Click **OK** to close the message and return to the *eCASE Portal Setup* wizard.

4 Application Installation

The purpose of the application server is to handle all eCASE Portal application operations between users and the eCASE Portal database. This section provides instructions on how to install the eCASE Portal on the application server.

(!!) Note: Begin Step 3 if continuing from the previous section (Create the eCASE Portal Database).

4.1 Set up the eCASE Portal Application

1. Open the **eCASE Portal 11.2.0** folder.
2. Right-click the **Setup.exe** file and select **Run as administrator**. The *eCASE Portal Setup* wizard launches.
3. Click **Install eCASE Portal Application Server**. The *eCASE Portal Application Server* window appears.
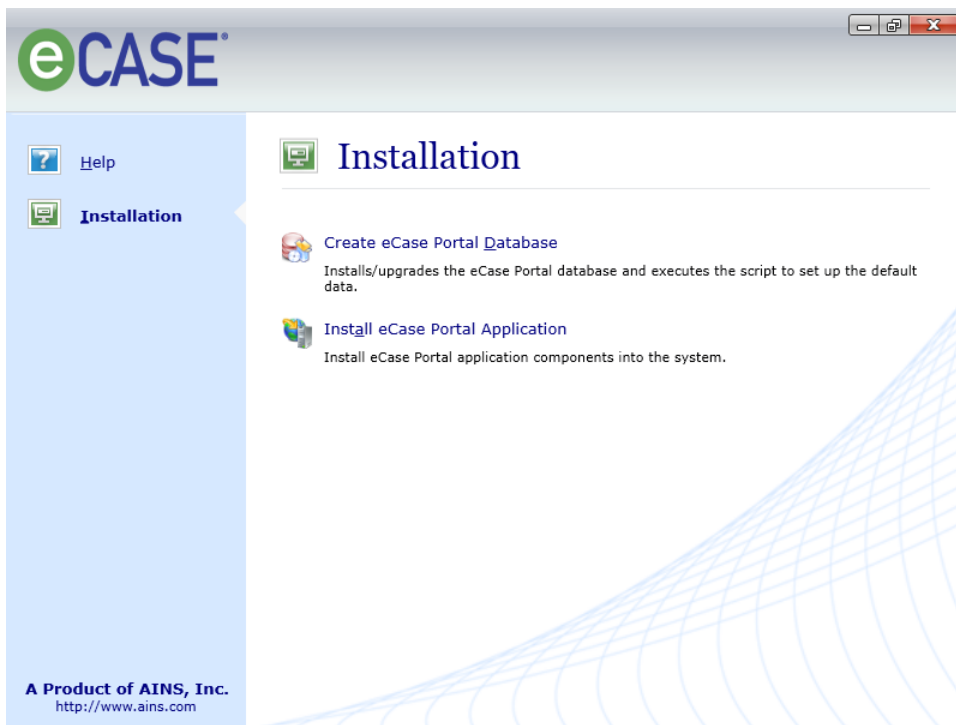
4. Click **Continue**.
5. The *eCASE Portal Setup* window appears.
6. Click **Next**. The *License Agreement* window appears.
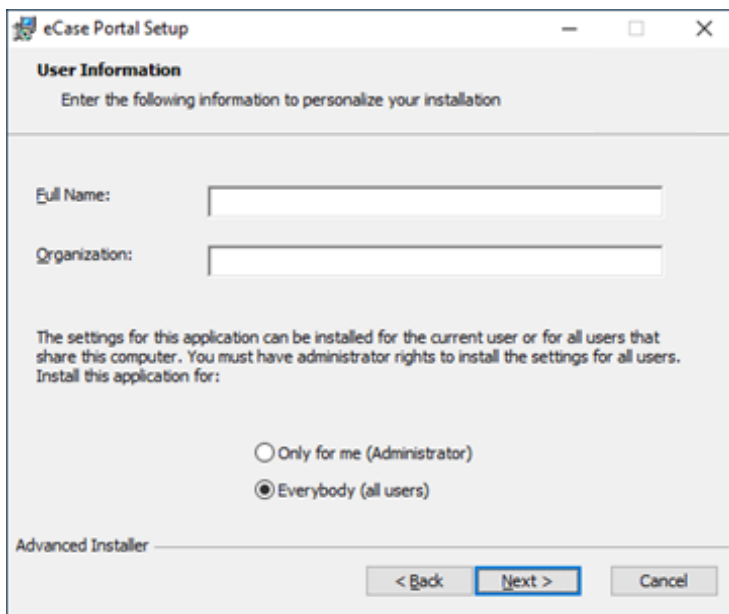7. Read the License Agreement carefully and select the **I accept the license agreement** radio button.

8. Click **Next** to continue the setup process.
9. Click the **Back** button to return to the *Welcome* window.
10. Click **Cancel** to abort the eCASE Portal installation.

(!!) Notes:

- **The Next button remains disabled until the option to accept the license agreement is selected.**
- **The Reset button sets the selection to the default option of *I do not Accept the License Agreement*.**

11. Enter the name of the user and organization, then click **Next**.
12. Ensure that the *Anyone Who Uses This Computer* radio button is selected.

13. Select the eCASE features to include in the installation by clicking the drop-down arrow next to a feature and selecting one of the following options:
    a. **Will be installed on the local drive**: Installs the selected feature only.
    b. **Entire feature will be installed on local hard drive**: Installs everything associated with the selected feature.
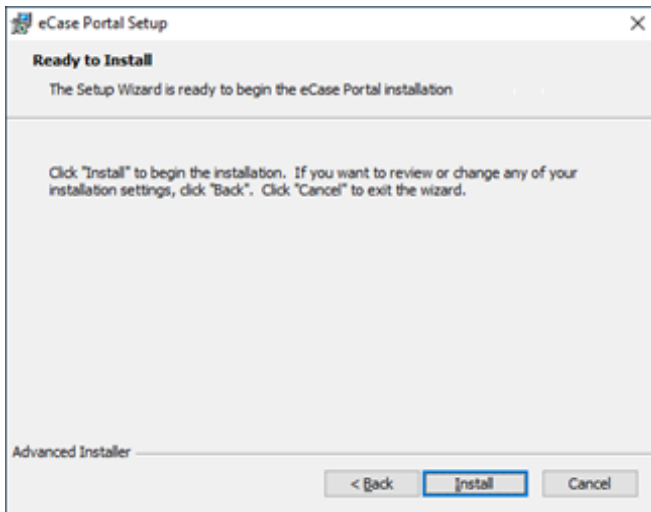   c. **Entire feature will be unavailable**: Excludes installation of a feature.
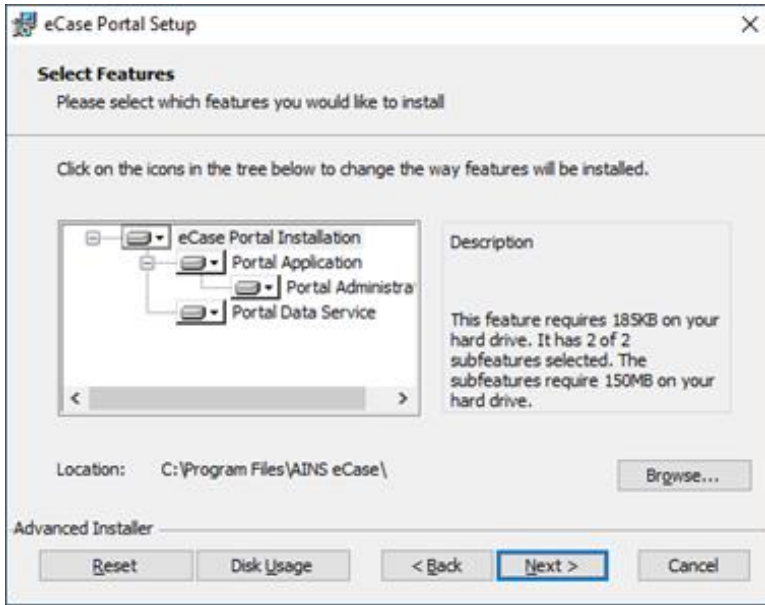
14. Review the instructions for setting up the default folder location. Click **Browse** to change the destination folder.
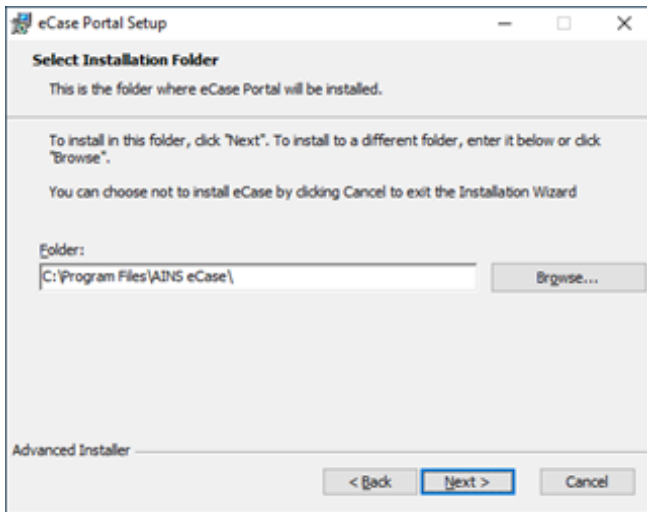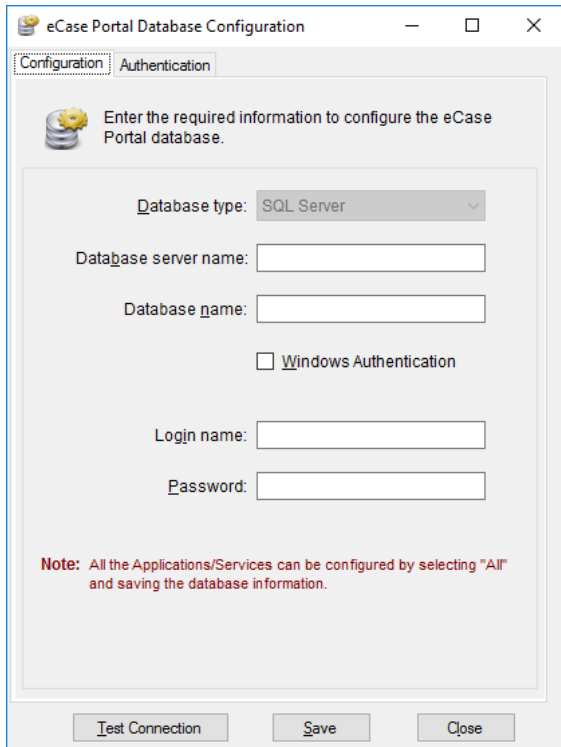

15. Click **Next** to accept the destination folder and to continue with the installation. The *Ready to Install* window appears.

16. Click **Next** to proceed with the installation. The *Updating System* window appears. The *eCASE Portal Setup wizard* begins the process of copying files and configuring the system. (This may take several minutes.)
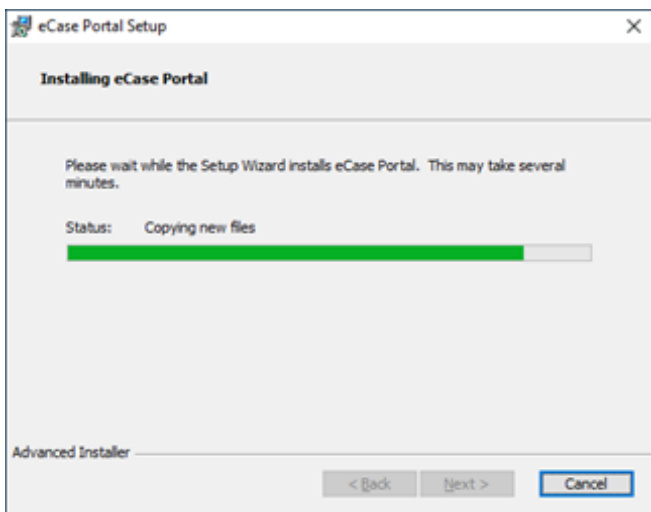
(!!) Note: It is highly recommended not to interrupt the Update process. Refer to Appendix A for uninstall procedures.

17. Once the eCASE Portal application is installed, the *eCASE Portal Configuration* window opens.

18. Users can close this window and enter the database and authentication details later or enter the required information outlined in the table below.

(!!) Notes:

- **The *Database Type* field is automatically populated and disabled. SQL Server is the only database type supported at this time.**
- **The user is automatically logged in to the database when Windows is selected as the *Portal Login Mode*.**

Field Name	Description
Database Server Name	The title of the server where the database is stored.
Database Name	The name given to the eCASE Portal database during creation.
Windows Authentication	Clicking this checkbox enables Windows Authentication.

Field Name	Description
Login ID	The unique identifier for the user having access to the eCASE Portal database.
Password	The security credential associated with the user to gain access to the database.
Enforce Password Policy	Select this checkbox to enforce the password policy for SQL Server.
Login Name	The unique identifier for the user who has administrative privileges for the database server.
Password	The security credential associated with the admin user.

19. Complete the Authentication details.

The Portal Login Mode selection may open additional fields, and the available selections include:

| Selection	Definition
Forms	The standard level of access to the eCASE application, Username and Password.
SAML	Allows the user to automatically log into eCASE without being prompted for login credentials.
Windows	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.

(!!) Note: If the Forms portal login mode is selected, enter the password for Admin account and complete the authentication details.

20. Enter the database details described in the table above and click **Save**. A confirmation message appears. Click **OK** to close the message window.

21. Click **Close** to exit the *eCASE Portal Configuration* window.

22. The following screen is displayed informing users that the application has been installed successfully. Click **Finish** to return to the setup wizard.
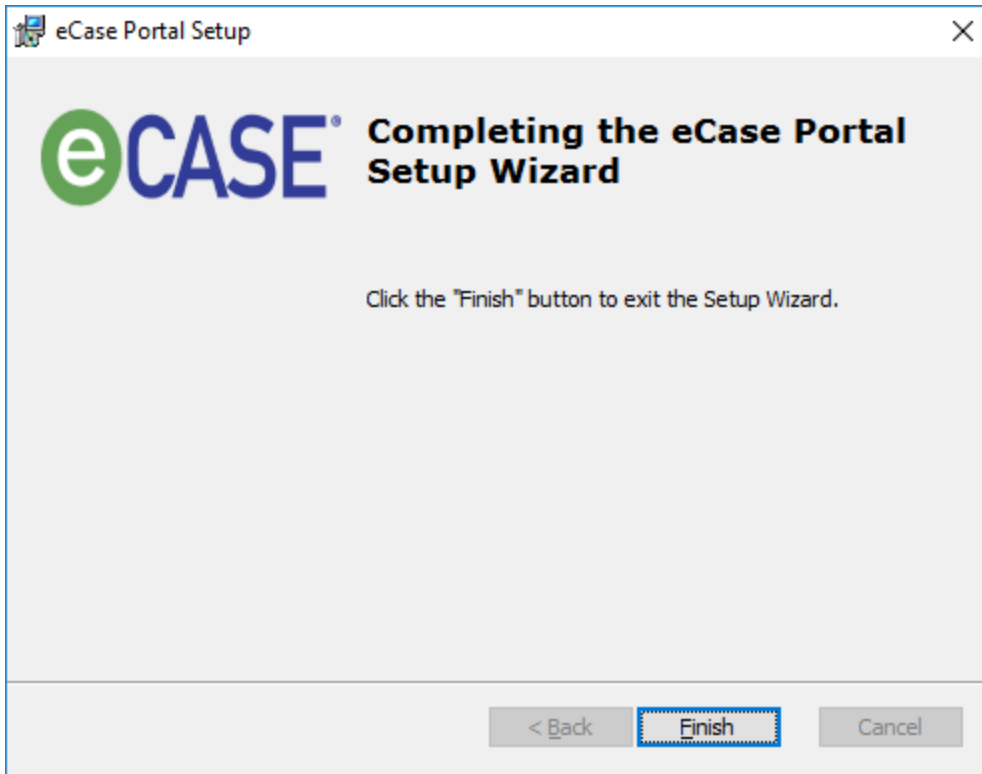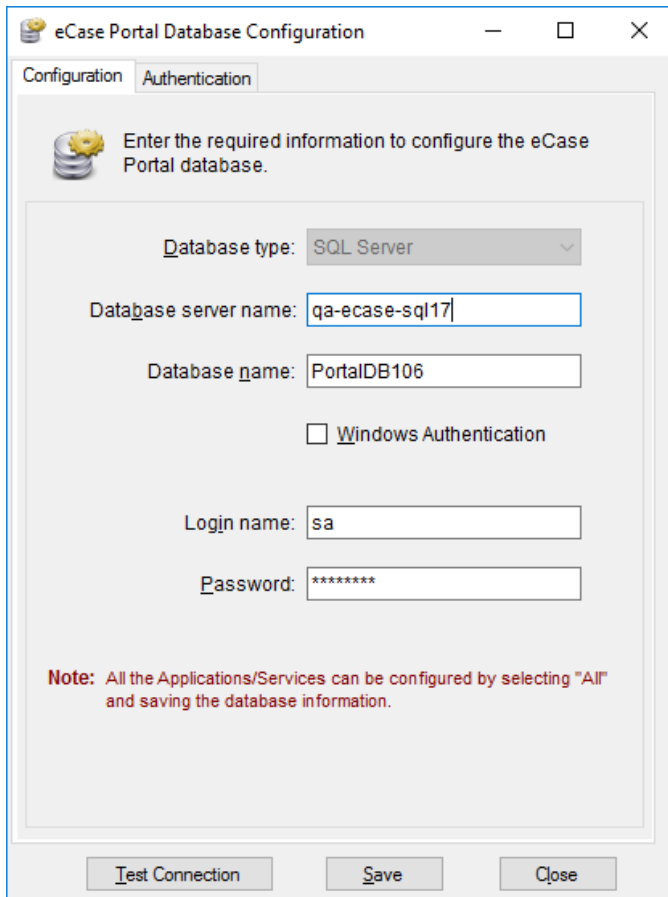

23. Continue with the next section to install eCASE Portal components.

4.2 eCASE Portal Database Configuration

If the eCASE Portal database was not configured during the Installation procedure, administrators can configure it using the configuration utility.

1. Navigate to **Start > All Programs > eCASE Portal**.

2. Right-click **Database Configuration** and select **Run as administrator**. The *eCASE Portal Configuration* window appears.
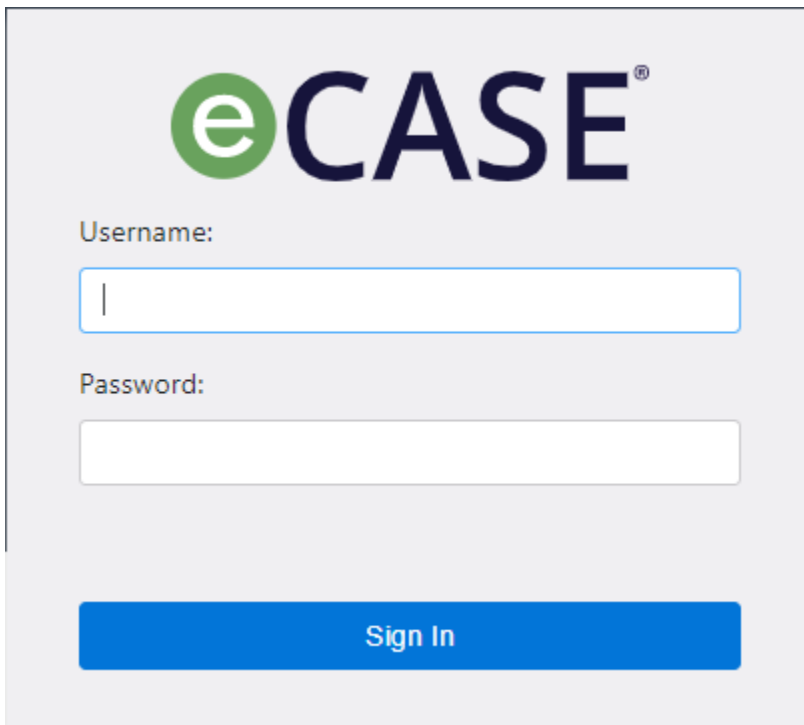
3. Enter the required information.

4. Click **Test Connection** to verify the information entered enables a successful connection.

5. Click **Save** to accept the configuration details. A message window appears. Click **OK** to close the message window.

6. Click **Close** to exit the *eCASE Portal Configuration* window.

5 Verify Access to eCASE Portal

After the eCASE Portal application and its components are installed and configured, it is recommended to verify access to the application. By verifying access administrators can resolve any issues or problems encountered in the event the application is inaccessible.

1. Select **Start > All Programs > Administrative Tools > Internet Information Services (IIS) Manager**.
2. Select **Start Page > Sites > Default Web Site**.
3. Select **eCASEPortal**.
4. Select **Manage Applications > Browse Application**.
5. Click **Browse *:80 (http)**. The *eCASE Portal Login Screen* appears.

6. Repeat steps 3 – 5, however, select **eCasePortalDataServices** instead of **eCasePortal**.

(!!) Note: If a server error page appears, enable Directory Browsing in IIS Manager by double-clicking Directory Browsing, selecting Enable from the Actions pane, and refreshing the browser.

7. Click the **PortalDataServices.svc** link. The *Portal Web Service* URL appears with XML coding.

```xml
<?xml version="1.0" encoding="UTF-8"?>
- <service xmlns:atom="http://www.w3.org/2005/Atom" xmlns="http://www.w3.org/2007/app"
  xml:base="http://localhost:81/eCasePortalDataServices/PortalDataService.svc/">
    - <workspace>
        <atom:title>Default</atom:title>
        - <collection href="Forms">
            <atom:title>Forms</atom:title>
        </collection>
        - <collection href="Files">
            <atom:title>Files</atom:title>
        </collection>
        - <collection href="AuditActions">
            <atom:title>AuditActions</atom:title>
        </collection>
        - <collection href="FormTemplates">
            <atom:title>FormTemplates</atom:title>
        </collection>
```

Portal Web Service
URL

8. Make note of the Portal Data Services URL. It is required in the *Configuring Portal Settings in the eCASE Application* section.

9. Close both browser windows.

6 Configuring Portal Settings in the eCASE Application

This section details how to setup the eCASE Portal for use in the eCASE application. Before performing these procedures, ensure that the eCASE application and the eCASE Portal are installed and configured on the application server.

1. Login to the eCASE application.
2. Click **Administration > Connectors**. The *Connectors* screen appears.
3. Select Portal row and click on **Edit** or click the **portal link**.
4. Ensure the **Enable eCASE Portal** checkbox is checked.
5. Enter the **Portal Web Service URL** in the *Portal Web Service URL* field.

6. Complete the fields outlined in the table below and click **Next**.

7. Click **Save** or click the **Back** button to return to the *Administration* screen.

8. Click **Scheduled Job > Portal Sync** and make sure the Inactive checkbox is blank.

9. Set the *Refresh time* to 1 minute.

10. Click **Save**.

11. On the *Scheduled Jobs* screen, click **Portal Update Folder Data Sync** and make sure the **Inactive** checkbox is blank.

12. Set the **Repeat for every time** to 1 minute.

13. Click **Save** and return to the *Administration* page by clicking the **Back** button.
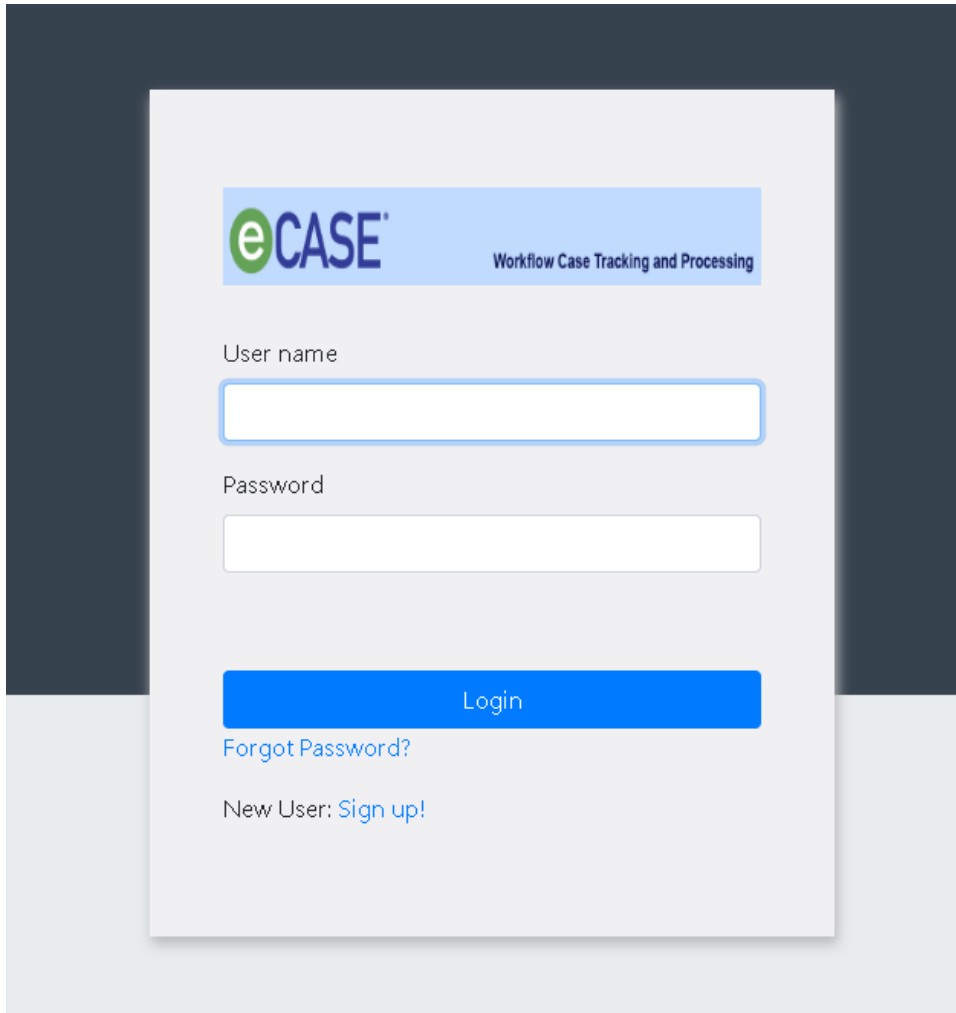
(!!) Note: For the Portal to function, ensure that the HTTP Activation Service in the eCASE Application Server Manager is enabled:

▪ **Navigate to the Application Server where the eCASE Portal is installed.**

- **Select to Start > Server Manager > Add Roles and Features.**
- **The *Add Roles and Features* wizard appears. Click Features.**
- **Ensure the HTTP Activation Protocol checkbox is selected.**

14. Navigate to http://[ServerName]/eCasePortal.

15. Click **Sign-Up**. The registration form appears. Complete the fields outlined in the table below and click **Next**.

Field Name	Description
First Name	The first name of the user whom is registering.
Last Name	The last name of the user whom is registering.

Field Name	Description
Email ID	The email which belongs to the registering user.
Password	The password which will authenticate the login credentials of the registering user.

(!!) Note: The following screenshot is for demonstration use only. The administrative user can create and customize forms.

16. The following message appears. Click the link to return to the *Login* page.

17. After receiving the Registration Confirmation email, return to *http://[ServerName]/eCasePortal* and login with the User ID and Password in the email you received.

18. The *Create New Password* form appears. Enter a **new password** in the *New Password* and *Confirm Password* fields.

19. Select a **question** from each of the **Security Questions** drop down lists.

20. Enter an **answer** to each Security Question in the *Security Answer* fields.

21. Click **Save New Password**. A confirmation message will appear.

6.1 Main Form Templates

To create a folder for the Case Type Form template, enable the Portal flag for the corresponding template.

1. Click **Administration > Case Types**.
2. Select a case type.
3. Select **Actions > Main Form Template**. The *Main Form Template* screen appears.
4. Click the **Enable for Portal** check box. The *Portal Display Name*, *Portal Group Name*, and *Portal User Role* fields appear.
5. Enter a **name** in the *Portal Display Name* field.
6. Select a **group name** from the *Portal Group Name* drop down list.
7. Enter the **user role** in the *Portal User Role* field.

(!!) Note: The *Portal Group Name* field displays option(s) corresponding to the case type form template.

8. To create a new Portal Group Name, click **New** or edit an existing group name click **Edit**. The result appears in the *Portal Group Name* drop-down list. If a group name was deleted, it is removed from the drop-down list.

9. Click **Save** to accept the settings.

6.2 Other Form Templates

Enabling the Portal flag for other form templates uses the same procedures as in the previous section.

1. Click **Administration > Case Types > Actions > Other Form Template**. The *Other Form Template* screen appears.
2. Select a **Form Template** from the Form Template drop-down list.
3. Click **Add**. The screen corresponding to the selection appears. (e.g. Telework)

4. Click the **Enable For Portal** checkbox. The *Portal Display Name*, *Portal Group Name* and *Portal User Role* fields appear.

5. Enter a **name** in the *Portal Display Name* field.

6. Select a **group name** from the *Portal Group Name* drop down list.

(!!) Note : The Portal Group Name field displays option(s) corresponding to the case type form template.

7. Enter the **user role** in the *Portal User Role* field.

8. To create a new Portal Group Name, click **New** or edit an existing group name click **Edit**. The result appears in the *Portal Group Name* drop-down list. If a group name was deleted, it is removed from the drop-down list.

9. Click **Save**.

10. After the Portal settings are configured in eCASE, a sync service job transfers the form template to the eCASE Portal. As a result, users in eCASE Portal can see the form template, thus enabling the submission of forms from the Portal.

11. Open Internet Explorer and type the **eCASE Portal URL** in the address field. For example, http://localhost:80/ecaseportal. The eCASE Portal Login screen should appear.

12. Enter the **User Name** and **Password**.

13. Click **Login**. The *eCASE Portal Home* screen appears.

If users submit requests via the eCASE Portal, a corresponding case folder is created in eCASE and made available in the user's eCASE inbox after initiating an assignment. The form status is updated in the eCASE Portal.

The eCASE user and the corresponding user in the eCASE Portal can communicate with each other through the *Portal Messages* feature.
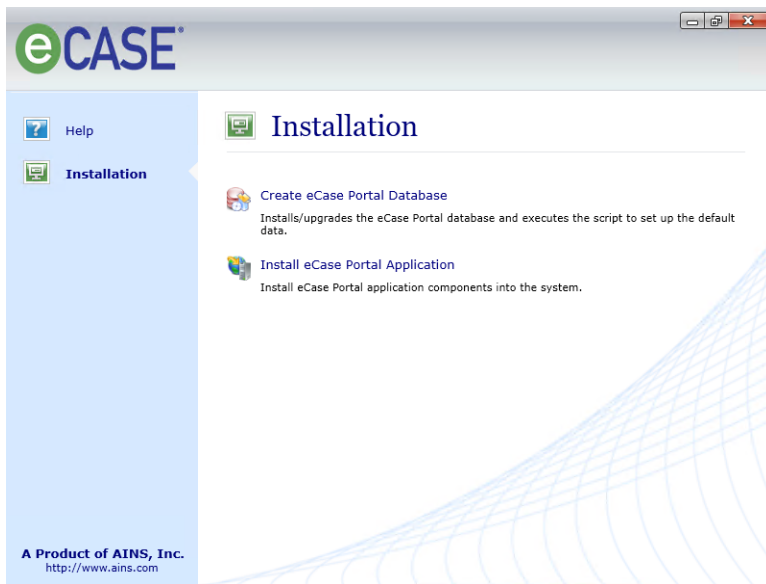
7   eCASE Portal Uninstallation

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

## 7.1   Uninstall the eCASE Portal Application

The eCASE Portal application can be uninstalled manually or by using the *eCASE Portal Setup Wizard*. If uninstalling the application using the setup wizard, it automatically detects the previous installation and redirect users 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 Portal then click Uninstall. The application is removed from the server.

1. Expand the eCASE Portal 11.2.0 folder.
2. Right-click on the **Setup.exe** file and select **Run As administrator**. The *eCASE Portal Setup* window appears.

3. Click **Install eCASE Portal Application Server**. The *Windows Installer* window appears briefly. After several seconds the *Application Maintenance* window opens with **Modify** selected as the default radio button.
4. Select **Remove** and click **Next**. The *eCASE Uninstall* window appears.
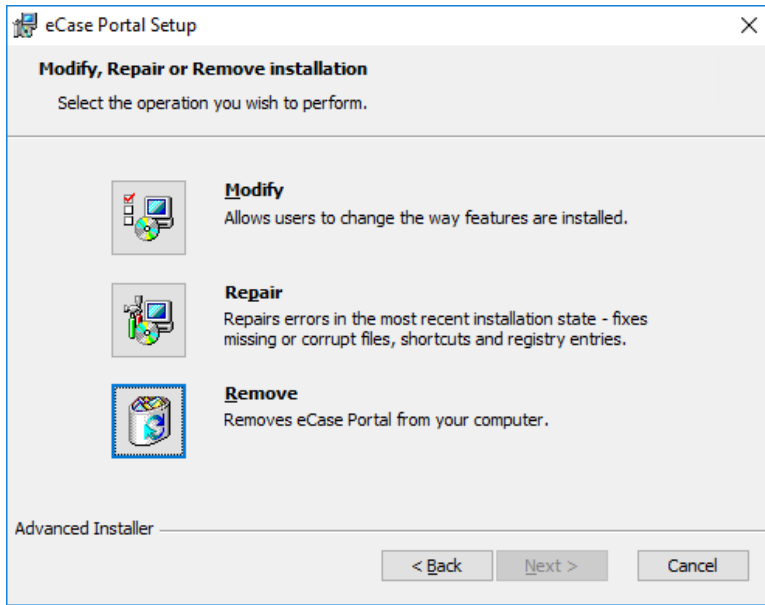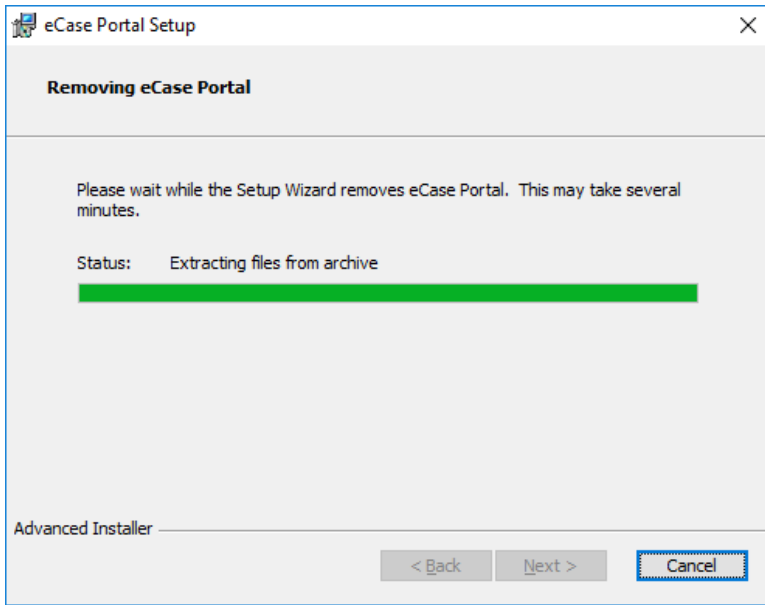
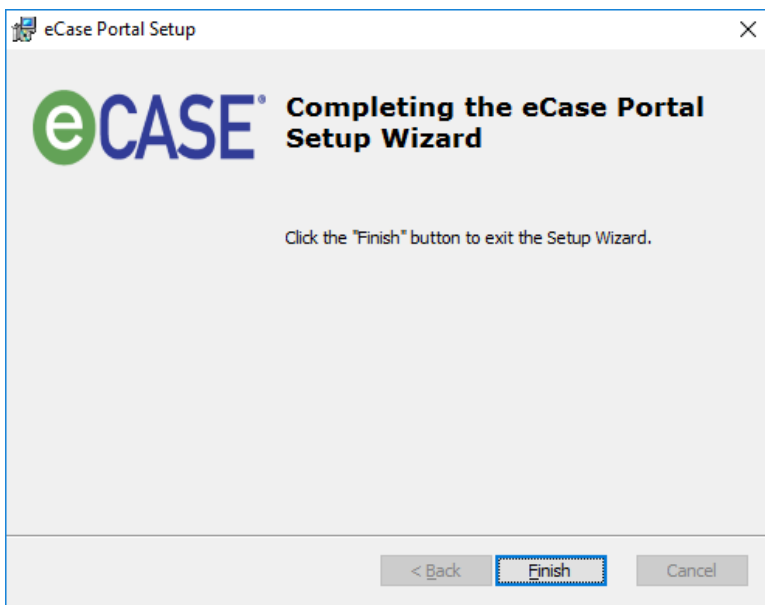5.   Click **Next**. The *Updating System* window appears.
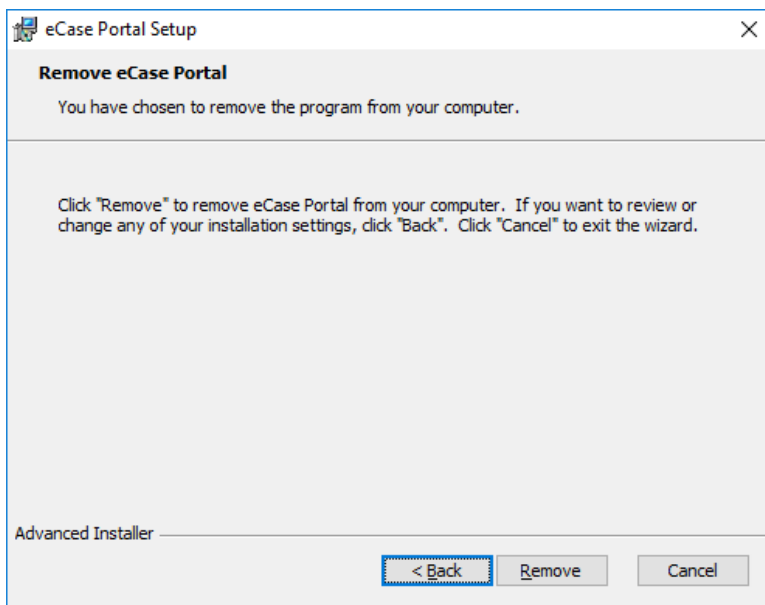
6.   The uninstallation process may take several minutes. Once complete the *Successful Uninstallation* window appears.

7. Click **Finish** to close the *eCASE Setup* window once the application is uninstalled.

(!!) Notes:

- **It is highly recommended not to interrupt the Updating System process. To interrupt, click the Cancel button. The *eCASE Portal Setup* window appears. 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 does not remove the entire application. Users must restart the entire uninstallation sequence to completely remove the application from the server.**