

Pre-Installation Manual



eCASE 11.2.0 Pre-Installation Manual

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Contents

1	Inti	rodu	uction	4
	1.1	Sco	ope	4
	1.2	Ov	verview	4
	1.3	Re	ferences	4
	1.4	Ac	ronyms, Abbreviations, and Definitions	4
2	Ge	tting	g Started	6
	2.1	eC	ASE Database Account Requirements	6
	2.2	Pro	ocess Workflow Diagram	6
3	Ful	ll Te	xt Search Options	8
	3.1	Ena	able Windows Search Service	8
	3.1	1	Steps to Enable Windows Search Service	8
	3.1	.2	Steps to Enable Windows Search Service for Use with .TIFF and .PDF files	10
	3.1	.3	Document Management System (DMS) File Storage Location	12
	3.2	Ena	able eCASE Search Service	13

1 Introduction

1.1 Scope

The purpose of this document is to provide instructions for configuring the eCASE database on the application server and configuring Native DMS within the eCASE application. Information presented in this document expects Windows 2016 R2/2019 Server installed on each server.

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

1.2 Overview

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

1.3 References

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

1.4 Acronyms, Abbreviations, and Definitions

Acronym/Abbreviation	Definition
CPU	Central Processing Unit
GUID	Globally Unique Identifier
IIS	Internet Information Service

Introduction

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

2 Getting Started

Before proceeding with the setup, it is necessary to install Microsoft SQL Server 2016/2017/2019 on the database server. For further information regarding the installation of these products, please consult your software vendor.

(!!) Notes:

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

2.1 eCASE Database Account Requirements

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

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

2.2 Process Workflow Diagram

The flowchart below displays the workflow of the eCASE setup.

Getting Started

Application/Portal Database Server



Application/Portal Server



3 Full Text Search Options

eCASE can be configured to use Windows Search Service or eCASE Search Service for full text searching. If Window Search Service is preferred, then enable Windows Search Service on eCASE Application Server. Otherwise, enable eCASE Search Service as described in this document.

3.1 Enable Windows Search Service

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

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

3.1.1 Steps to Enable Windows Search Service

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

1. Click Start, and then click Server Manager.

💺 Server Manager						- 🗆 ×
Server Ma	anager • Dash	board		• 🕲 I 🧗	<u>M</u> anage <u>T</u> ools	; <u>V</u> iew <u>H</u> elp
📰 Dashboard	WELCOME TO SERV	ER MANAGER				^
Local Server All Servers File and Storage Services		1 Confi	gure this local	server		
to IIS	QUICK START	2 Add	d roles and feature	S		
	WHAT'S NEW	3 Add	d other servers to i	manage		
		5 Cor	nnect this server to) cloud services		
	LEARN MORE					Hide
	ROLES AND SERVER Roles: 2 Server group File and Sto Services Manageabilit Events	rage 1	1 T IIS Manageability Events	1		

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

📥 Add Roles and Features Wizard		_		Х
Before you begin		DESTINA QA-EC	TION SERV ASE-WIN2	'ER 101
Before You Begin Installation Type Server Selection Server Roles Features Confirmation	This wizard helps you install roles, role services, or features. You determine which ro features to install based on the computing needs of your organization, such as sha hosting a website. To remove roles, role services, or features: Start the Remove Roles and Features Wizard Before you continue, verify that the following tasks have been completed: • The Administrator account has a strong password	oles, role ring doci	services, uments, c	or
Results	 Network settings, such as static IP addresses, are configured The most current security updates from Windows Update are installed If you must verify that any of the preceding prerequisites have been completed, clo complete the steps, and then run the wizard again. To continue, click Next. 	ose the w	izard,	
	Skip this page by default			
	< <u>P</u> revious <u>Next</u> Inst		Cance	I

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

📥 Add Roles and Features Wizard		- 🗆 X
Select server role	S	DESTINATION SERVER QA-ECASE-WIN201
Before You Begin	Select one or more roles to install on the selected server.	
Installation Type	Roles	Description
Server Selection Server Roles Features Confirmation Results	Active Directory Lightweight Directory Services Active Directory Rights Management Services Device Health Attestation DHCP Server DRS Server As Server File and Storage Services (1 of 12 installed) ✓ File and Storage Services Tile Server BranchCache for Network Files Data Deduplication DFS Namespaces DFS Replication File Server Resource Manager File Server Storage Storage Storage Provider (VDS and VSS Server for NFS Work Folders Work Folders Work Folders	File Server manages shared folders and enables users to access files on this computer from the network.
	< <u>P</u> revious <u>N</u> ext	> <u>I</u> nstall Cancel

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



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

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

This section describes how to configure the Windows Search Service to include .tiff and .pdf files in searches. This feature is disabled by default in Windows Server 2012 R2. The

installation process involves enabling the IFilter feature in Windows Search Service and installing the Adobe PDF IFilter from the Adobe. To enable Windows Search Service:

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



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



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



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



- 5. Download and install Adobe PDF iFilter. This is available on the Adobe website.
- 6. After installing Adobe PDF IFilter, restart the Windows Search Service.

3.1.3 Document Management System (DMS) File Storage Location

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

- 1. Launch the Control Panel, click Index Options, and then click Modify.
- 2. Remove all locations in the index except the eCASE Native DMS file storage location.

- 3. Ensure the search service account has read access to the eCASE Native DMS file storage location.
- 4. Click **Advanced**, and then click **Rebuild**.

3.2 Enable eCASE Search Service

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

🔓 eCase Database Setup
To set up the eCase file repository, choose the location paths for the following entities.
eCase Repository Information
Repository Type: Native
The location specified below is with respect to the webserver. Before using the webserver make sure that this folder exist on the system and it is accessible through the web server.
Document Search Service: Windows Search Service
Na <u>m</u> e:
Root Directory:
Ca <u>p</u> acity (MB):
Back Next Cancel

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

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

Follow the steps below to enable Search Service:

- 1. Run eCASE installer.
- 2. Go to Configuration > Create eCASE Database > SQL Server.



3. Provide DB Info.

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

4. Select Native and eCASE Search Service.

eCase Database Setup
To set up the eCase file repository, choose the location paths for the following entities.
eCase Repository Information
Repository Type: Native
The location specified below is with respect to the webserver. Before using the webserver make sure that this folder exist on the system and it is accessible through the web server.
Document Search Service: Ecase Search Service 🗸
Name: DMS
Root Directory:
Capacity (MB):

5. Create DMS folder from a different server.



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

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

7. Click **Permissions**.

Advanced Sharing
Share this folder
Settings
S <u>h</u> are name:
DMSAPP06
<u>A</u> dd <u>R</u> emove
Limit the number of simultaneous users to: 16777 \sim
Comments:
Permissions Caching
OK Cancel Apply

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

Permissions for	or DMSAPP06	5	x
Share Permissions			
Group or user names:			
A install CA-ECASE-APP06\$ (AINSIN	DIA\QA-ECASE-#	APP06\$)	
	Add	Remove	
Permissions for install	Allow	Deny	
Full Control	•		
Read	⊻		
			AC
ОК	Cancel	Apply	

9. Open the *Security* tab and click **Edit**.

DMSAPP06 Properties			
General Sharing Security Previous Versions Customize			
Object name: C:\DMSAPP06			
Group or user names:			
Administrator (QA-ECASE-APP07\Administrator) Administrators (QA-ECASE-APP07\Administrators) Jusers (QA-ECASE-APP07\Users)			
< III >			
To change permissions, click Edit.			
Permissions for SYSTEM Allow Deny			
Full control			
List folder contents			
Read V Write V			
For special permissions or advanced settings, Advanced Advanced.			
Close Cancel Apply			

10. Add eCASE application server, main application pool users, and users for the remote server.