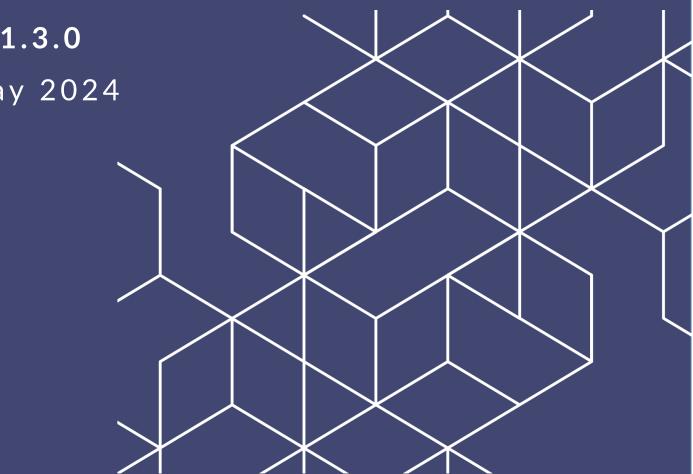


Portal Installation Manual

v11.3.0 May 2024



eCASE 11.3.0 Portal Installation Manual

Notice of Rights

Copyright © 2024, AINS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: AINS, LLC. For information on obtaining permission for reprints and excerpts, contact info@opexustech.com.

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (AINS, LLC.) on an "As Is" basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

Notice of Trademarks

The publisher's company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: AINS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

Non-Disclosure Statement

This document's contents are confidential and proprietary to AINS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from AINS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of AINS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.

Contents

1	Intro	oduction	4
	1.1	Scope	4
	1.2	Overview	4
2	Get	ting Started	5
	2.1	Prerequisites	5
	2.2	eCASE Portal Database Account Requirements	5
3	Crea	ate the eCASE Portal Database	7
4	Арр	lication Installation	11
	4.1	Set up the eCASE Portal Application	11
	4.2	eCASE Portal Database Configuration	18
5	Veri	fy Access to eCASE Portal	20
6	Con	figuring Portal Settings in the eCASE Application	22
	6.1	Main Form Templates	26
	6.2	Other Form Templates	27
7	eCA	SE Portal Uninstallation	30
	7.1	Uninstall the eCASE Portal Application	30

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

Getting Started

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.

CASE [°]	
☑ Help☑ Installation	<image/> <section-header> Installation Acta case Portal Database Atals/upgrades the eCase Portal database and executes the script to set up the default tata. Instal case Portal Application Atal e Case Portal application components into the system. </section-header>
A Product of AINS, Inc. http://www.ains.com	

3. Select Create eCASE Portal Database > SQL Server for the database type.

Create eCase Portal Database SQL Server 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.

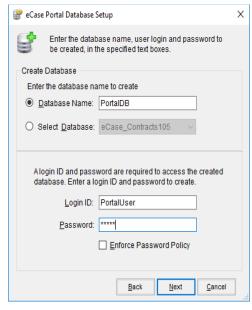
👺 eCase Portal Database Setup	Х				
Enter the required information to create and configure the eCase Portal database on MS SQL Server.					
Connect to MS SQL Database Server					
Enter the database server to connect					
Server Name: SQL2016					
Authentication Mode					
● SQL Server Mode ○ Windows Mode					
Provide Login ID and Password to create eCase Portal database.					
Login ID: sa					
Password: *******					
<u>N</u> ext <u>Cancel</u>] _				

(!!) 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.

Ready to Setup the eCase Portal Database. Setup Progress Component Status Create Database Pending	Х
Component Status	
Create Database Pending	
Execute Script Pending	
eCase Portal Tables Pending	
<u>B</u> ack <u>F</u> inish <u>C</u> ancel	

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.

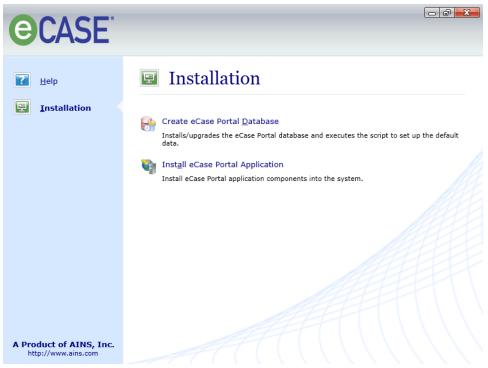
4 Application Installation

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.

🛃 eCase Portal Setup		-		×
User Information Enter the following information to personalize you	r installation			
Eull Name:			_	
Organization:				
The settings for this application can be installed for t share this computer. You must have administrator rig Install this application for:				
Only for me (Admir				
Everybody (all use	rs)			
Advanced Installer				
<	Back <u>N</u> ext⇒	>	Cance	ł

- 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.

Nease select which	ch features you would	like to inst	al
Click on the icons	in the tree below to d	hange the	way features will be installed.
And an	Case Portal Installatio	n	Description
وبا	Portal Data Serv		This feature requires 185KB on your hard drive. It has 2 of 2 subfeatures selected. The
<		>	subfeatures require 150MB on your hard drive.

14. Review the instructions for setting up the default folder location. Click **Browse** to change the destination folder.

🛃 eCase Portal Setup	-		×
Select Installation Folder			
This is the folder where eCase Portal will be installed.			
To install in this folder, click "Next". To install to a different folder, en "Browse".	ter it be	slow or clid	k
You can choose not to install eCase by clicking Cancel to exit the Inst	allation	Wizard	
Eolder:			
C:\Program Files\AINS eCase\		Brgwse	
Advanced Installer			
< Back Next :	>	Can	el

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

🛃 eCase Portal Setup	×
Ready to Install	
The Setup Wizard is ready to begin the eCase Portal 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 Cancel	

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.)

🛃 eCase Portal Setup	×
Installing eCase Portal	
Please wait while the Setup Wizard installs eCase Portal. This may take sever minutes.	al
Status: Copying new files	
Advanced Installer	
< Back Next >	Cancel

(!!) 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.

🔗 eCase Portal Database Configuration	-		×
Configuration Authentication			
Enter the required information to config Portal database.	gure the	eCase	
Database type: SQL Server		\sim	
Data <u>b</u> ase server name:			
Database <u>n</u> ame:			
<u>W</u> indows Auth	renticati	on	
Login name:			
Password:			
Note: All the Applications/Services can be configure and saving the database information.	ed by se	lecting "All"	
Test Connection Save		Close	

(!!) 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.

Application Installation

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.

🔗 eCase Portal Database Confi	guration	_		×
Configuration Authentication				
Authentication Details				
Portal login <u>m</u> ode:	Forms		\sim	
Membership provider:	Database		\sim	
Admin Details				
Portal <u>a</u> dmin login mode:	Forms		\sim	
Login Name:	Admin			
<u>P</u> assword:	_			
Two Factor Authentication				
Client Cert Subject Fields:				
Data Service Details				
Authentication Mode:	None		\sim	
	Require SSL			
Test Connection	<u>S</u> ave		Close	

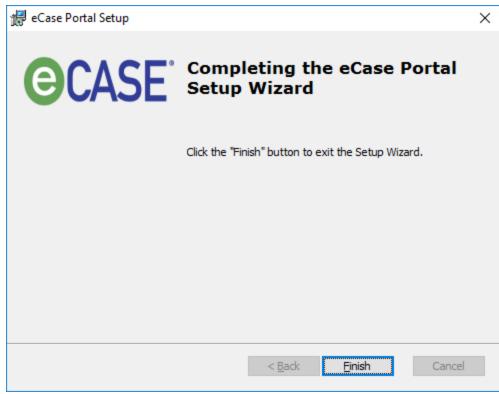
The Portal Login Mode selection may open additional fields, and the available selections include:

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.

🔮 eCase Portal Database Config	guration	—		×
Configuration Authentication				
Authentication Details				
Portal login <u>m</u> ode:	Forms		\sim	
Membership p <u>r</u> ovider:	Database		\sim	
Admin Details				
Portal <u>a</u> dmin login mode:	Forms		\sim	
Login <u>N</u> ame:	Admin			
Password:	****			
Two Factor Authentication				
Client Cert Subject Fields:				
Data Service Details				
Authentication <u>M</u> ode:	None		\sim	
	Require SSL			
Test Connection	Save		Close	

- 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.

Application Installation

🔗 eCase Portal Database Config	juration	_		\times
Configuration Authentication				
Enter the required in Portal database.	formation to config	ure the	eCase	
<u>D</u> atabase type:	SQL Server		\sim	
Data <u>b</u> ase server name:	qa-ecase-sql17			
Database <u>n</u> ame:	PortaIDB106			
	Windows Auth	enticati	on	
Lo <u>gi</u> n name:	sa			
Password:	******			
Note: All the Applications/Servi and saving the database		d by sek	ecting "AII"	
Test Connection	<u>S</u> ave		Close	

- 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.

©CASE °	
Username:	
Password:	
Sign In	

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 doubleclicking 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.



- 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.

Portal - Google Chrome			-		×
A Not secure qa-ecase-106/eCa	seAdmin/Connectors/Portal.aspx				
🛃 <u>S</u> ave 🔕 <u>C</u> lose		Note: * fields ar	e mandato	ry when	enabled
Enable/Disable	2				
Portal Web Service URL *:]
Sender Display Name *:]		
Sender Email Address *:]		
User Registration Form :	[Select User Registration Form]	~	•]		
First Name Field *:					
Last Name Field *:					
Email/Login Field *:					
User Registration Contact Type *:	[Select Contact Type]	~			
Security Questions Choice List *:	[Select Security Questions Choice List	t] 🗸			

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

New Portal User Registration Form
first_name
last_name
email_id
Congressperson •
Security Questions

- 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.

ob Name	
	Portal Sync
·	
Description:	Performs data sync between eCase and Portal databases
Start Date/Time	4/26/2019 III 3 PM ▼ 00 ▼
Repeat for every :	1 Minutes V
xecute only on Business Days:	
eactivate on Failure:	
Inactive:	Remove Checkmark

- 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.

CASE	Workflow Case Tracking and Processing
User name	
Password	
Energy December 12	Login
Forgot Password? New User: Sign up!	

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.

CASE °	١	Norkflow Case Tracking and Processing
	User Regist	ration Form
First Name		
Last Name		
Email ID		
Password		
	Register	Cancel

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



- 17. After receiving the Registration Confirmation email, return to <u>http://[ServerName]/eCasePortal</u> 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.

CASE	Workflow Case Tracking and Processing
	Create New Password New Password
	Confirm Password
	Security Question 1
	[·····Select Question 1·······]
	Security Answer 1
	Security Question 2 [seketQuestion 2]
	Security Answer 2
	Security Answer 2
	Security Question 3
	[Select Question 3
	Security Answer 3
	Save New Password
NOTE : User Password should conta	ain at least 1 uppercase letter, 1 lowercase letter, 1 Special character, 1 Numeric character.

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

CASE [°]	Workflow Case Tracking and Processing
F	Registration Confirmation
Your password and see	curity questions have been updated successfully!
Click	here to return to the login page

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.

🖌 Save 🍄 Preview 🗙 Remove 🛅 Perr	nissions 🚚 Back
Form Template:	Employee
Required Database Column Validation:	
Enable Locking:	
Enable Auto-Locking:	E
Role Type:	InfoPath O WorkFlow
Enable For Portal:	Click this checkbox
Portal Display Name*:	eCase Portal
Portal Group Name:	Correspondence
Portal User Role:	Manager

- (!!) 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.

🌈 Portal Group Name - Windows Internet Explorer 📃 🗖 🗙	🌔 🌈 Portal Group Name - Windows Internet Explorer 🛛 🗖 🗙
Sa <u>v</u> e O Close	Save X Delete O Close
Portal Group Name: *	Portal Group Name: * Correspondence Note: * fields are mandatory

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)

elect Form Template to add :	[Select Form Template]	- Add
	[Select Form Template]	
	Correspondence Issue Tracker	
	Service Request	Found.
	Awards	
	Reasonable Accommodation Telework	
	CBP-Tasking	
	QFR-CBP	
	QFR-Component Clearance	
	Congressional-Report Citizen-Mail	
	Congressional	
	Memorandum of Agreement	
	Memorandum of Understanding Policy Directive	
	BI Draft	
	ROI Draft	
	Audit	
	Audit Plan Audit Recommendation	
	Closure-Request	
	Information-Request	
	Investigation	

- 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.

Form Template:	Telework
Required Database Column ¥alidation:	
Display Name:	Telework
Enable Locking:	
Enable Auto-Locking:	E
Role Type:	C InfoPath C WorkFlow
Enable For Portal:	
Portal Display Name*:	eCase Portal
Portal Group Name:	Employee Kew Edit
Portal User Role:	Manager

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, <u>http://localhost:80/ecaseportal</u>. The eCASE Portal Login screen should appear.
- 12. Enter the User Name and Password.

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

	Subn	nittable Forms		Unread Messages (0) Inbox
	Form Name		Help	
Test			Instructions	
			View more »	
	1	My Forms		
Form Name	Status	Case Number	Case Status	

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

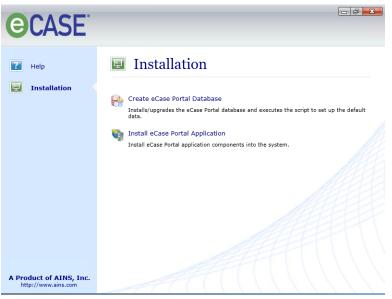
This section provides instructions on uninstalling eCASE Portal from the application server.

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.

eCASE Portal Uninstallation

🖟 eCase Portal Setup		×
Modify, Repair or Re Select the operation	you wish to perform.	
	<u>Modify</u> Allows users to change the way features are installed.	
i 🖉	Repair Repairs errors in the most recent installation state - fixes missing or corrupt files, shortcuts and registry entries.	
	<u>R</u> emove Removes eCase Portal from your computer.	
Advanced Installer	< <u>B</u> ack <u>N</u> ext > Cancel	

5. Click **Next**. The *Updating System* window appears.

🛃 eCase Portal Setup	\times
Remove eCase Portal	
You have chosen to remove the program from your computer.	
Click "Remove" to remove eCase Portal 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>R</u> emove Cancel	

6. The uninstallation process may take several minutes. Once complete the *Successful Uninstallation* window appears.

🖟 eCase Portal S	Setup	×
Removing e	Case Portal	
Please wai minutes.	it while the Setup Wizard removes eCase Portal. This may take several	
Status:	Extracting files from archive	
Advanced Installer		
	< <u>B</u> ack <u>N</u> ext > Cancel	

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

🛃 eCase Portal Setup		×
CASE	Completing the eCase Portal Setup Wizard	
	Click the "Finish" button to exit the Setup Wizard.	
	< Back Finish Cancel	

(!!) 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.