eCASE

OPEXUS

Pre-Installation Manual

v11.3.0

May 2024
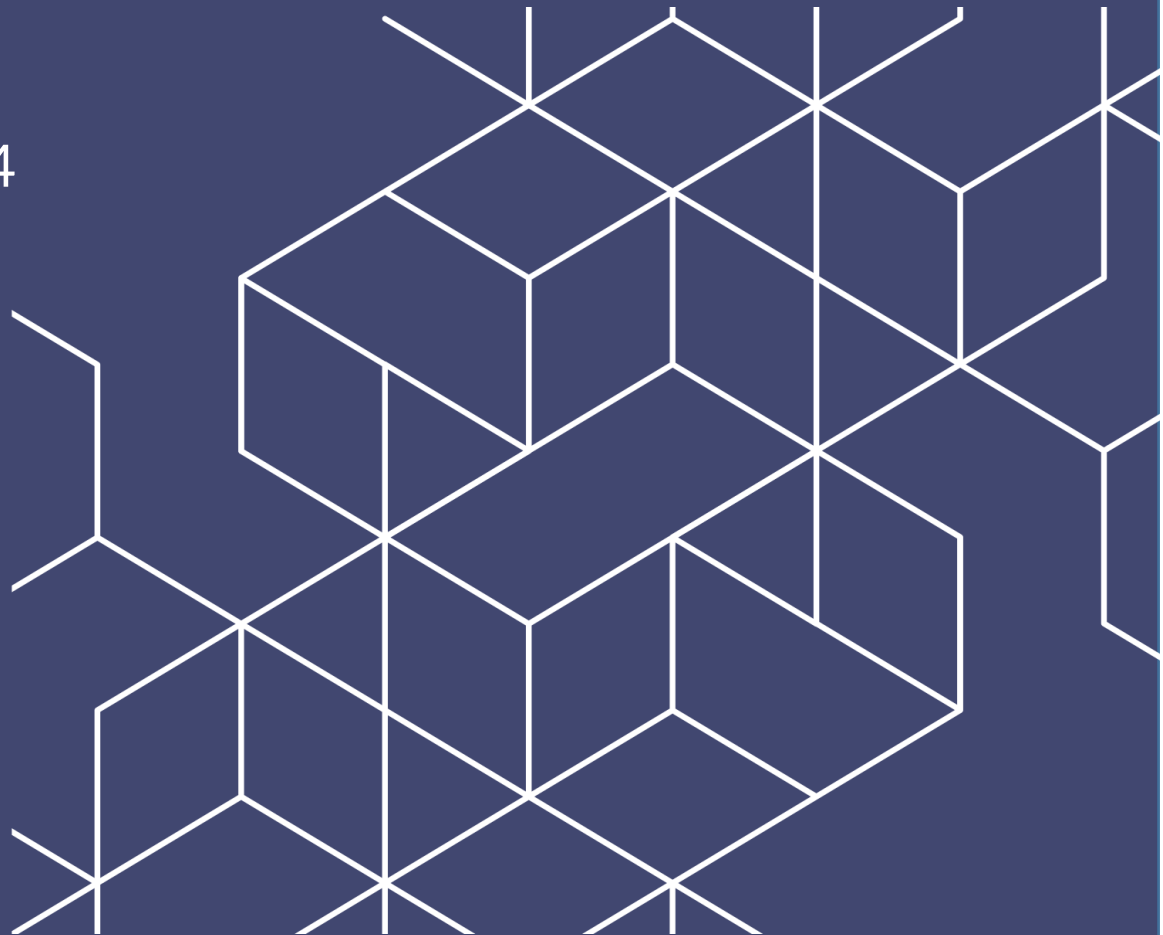
eCASE 11.3.0 Pre-Installation Manual

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Contents

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 Web-based case management platform that allows users to implement business applications that can automate business process, workflows and interactions between case workers and employees/public. It uses SQL Server database to store all data and content repository to store all documents.

1.3   References

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

1.4   Acronyms, Abbreviations, and Definitions

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

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.

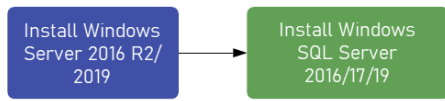| Account	Purpose	Requirement
Application Setup	This user will install and configure the eCASE application and its Services.	This account is setup as a Domain/Local User and is a member of the Administrators on server groups.
eCASE Database Creation	This user setups the eCASE database user account and 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

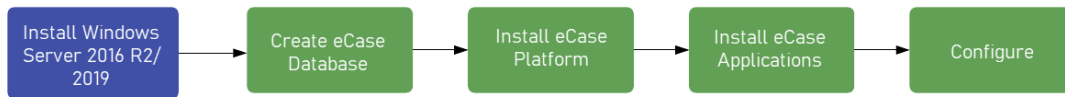The flowchart below displays the workflow of the eCASE setup.

Application/Portal Database Server

```
┌─────────────────┐      ┌─────────────────┐
│ Install Windows │      │ Install Windows │
│ Server 2016 R2/ │ ───▶ │   SQL Server    │
│      2019       │      │   2016/17/19    │
└─────────────────┘      └─────────────────┘
```

Application/Portal Server

```
┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│Install Windows│   │ Create eCase │   │ Install eCase│   │ Install eCase│   │              │
│Server 2016 R2/│──▶│   Database   │──▶│   Platform   │──▶│ Applications │──▶│  Configure   │
│     2019      │   │              │   │              │   │              │   │              │
└──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘
```

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.
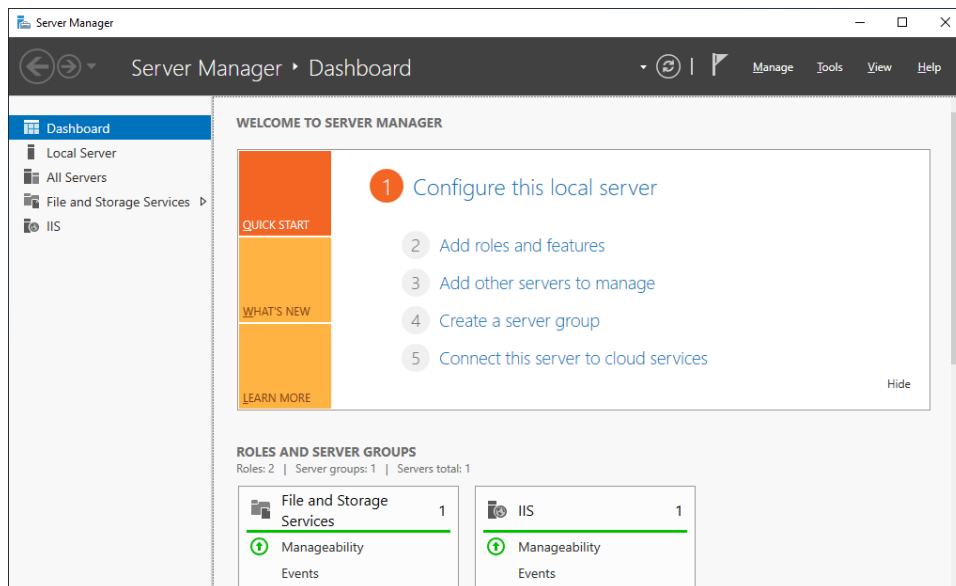
3.1 Enable Windows Search Service

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.

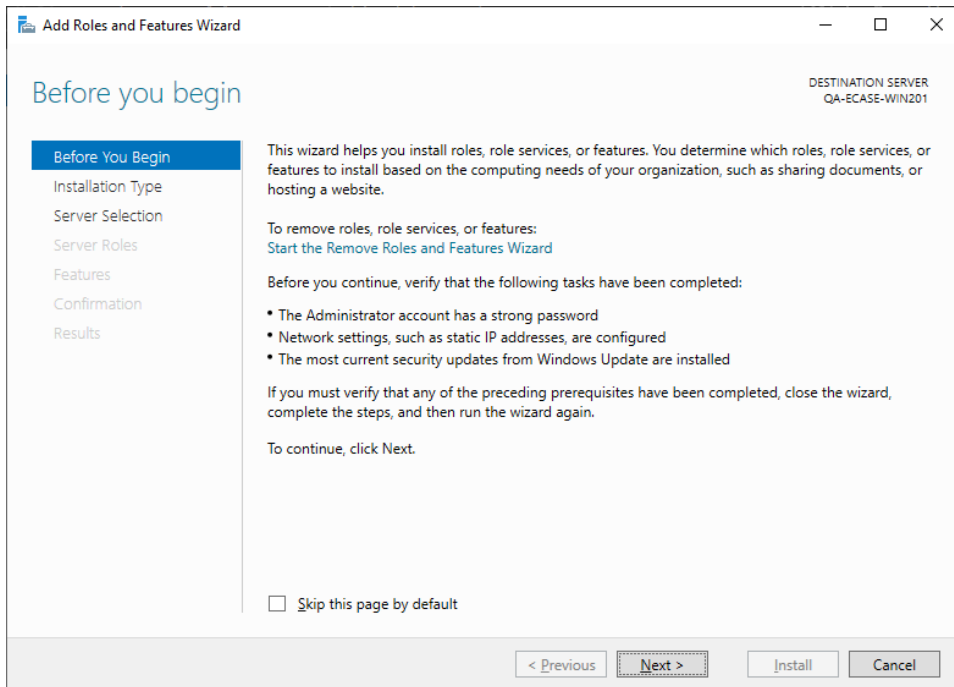1. Click **Start**, and then click **Server Manager**.

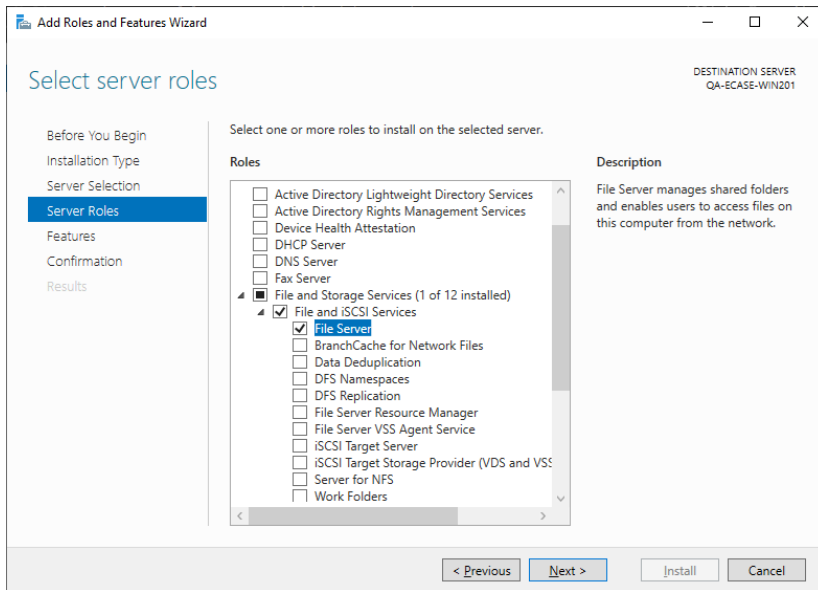2. Click **Add Roles and Features**, and then click **Next**.

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

4. In the navigation panel on the right, click **Server Selection**, click **Select a server from the server pool**, under **Server Pool**, click the name of a server, and then click **Next**.

5. In the navigation panel on the right, click **Server Roles**, and then:

   a. Select **File** and **Storage Services** (1 of 12 installed).

   b. Select **File** and **iSCSI Services** (0 of 11 installed).

   c. Select **File Server**.

   d. Click **Next**.

6. In the navigation panel on the right, click **Features**, and then select **Windows Search Service**.
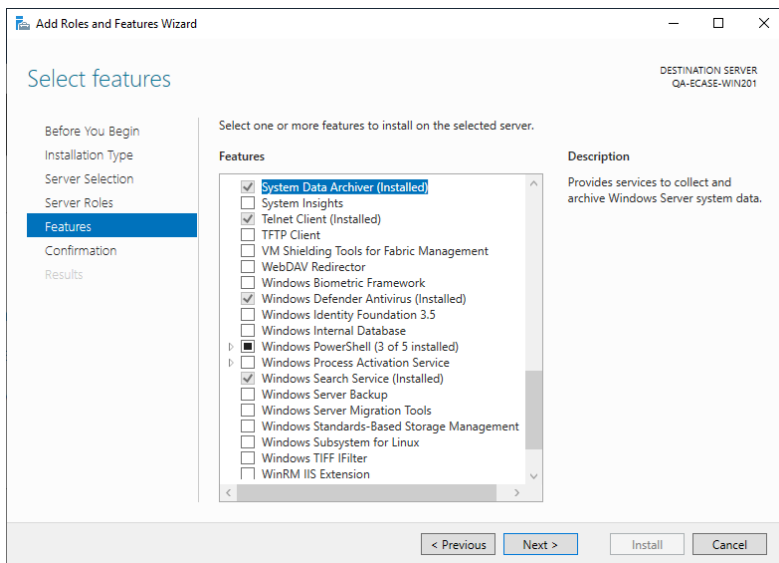
7. In the navigation panel on the right, click **Confirmation**, and then click **Install**.
8. In the navigation panel on the right, click **Results**. After the installation process finishes, click **Close**.

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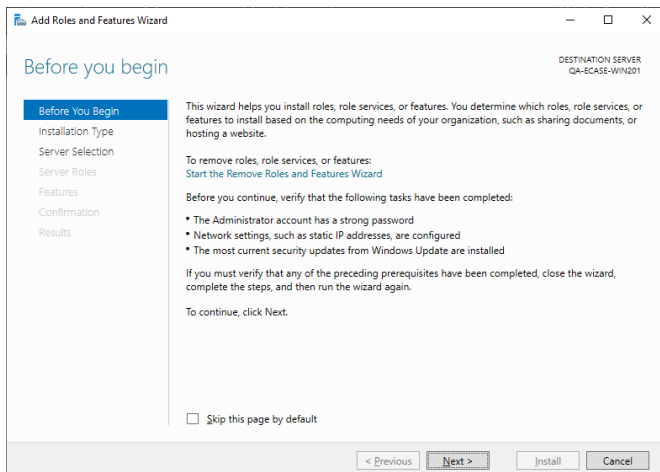
installation process involves enabling the IFilter feature in Windows Search Service and installing the Adobe PDF IFilter from the Adobe. To enable Windows Search Service:

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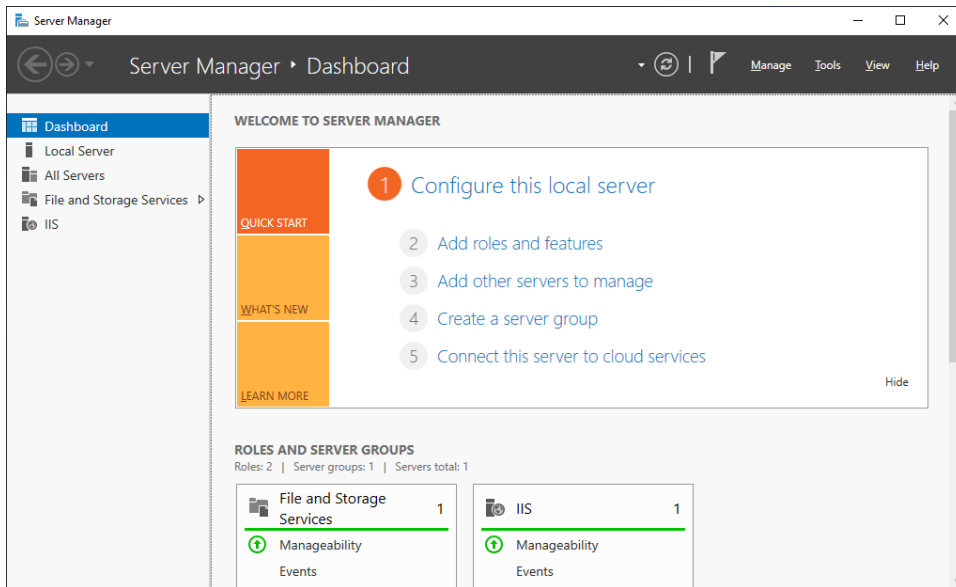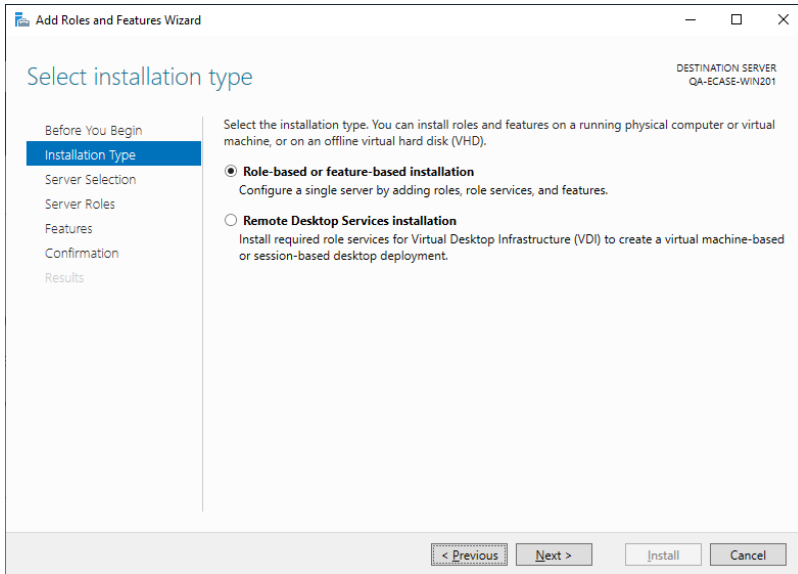

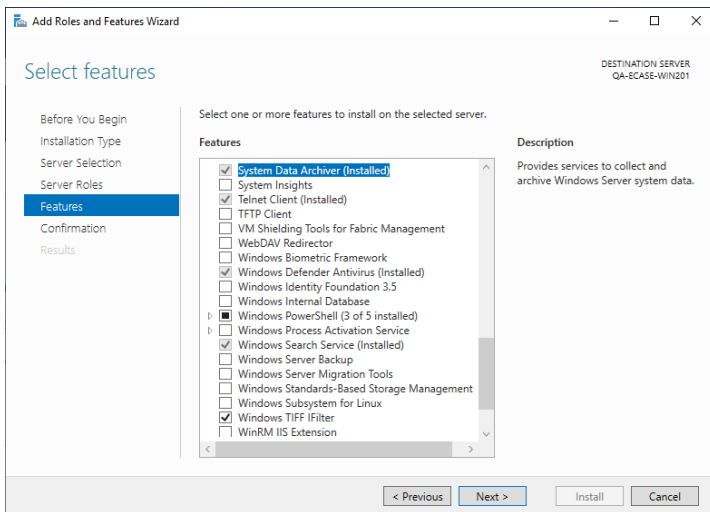2.   Click **Add Roles and Features**, and then click **Next**.

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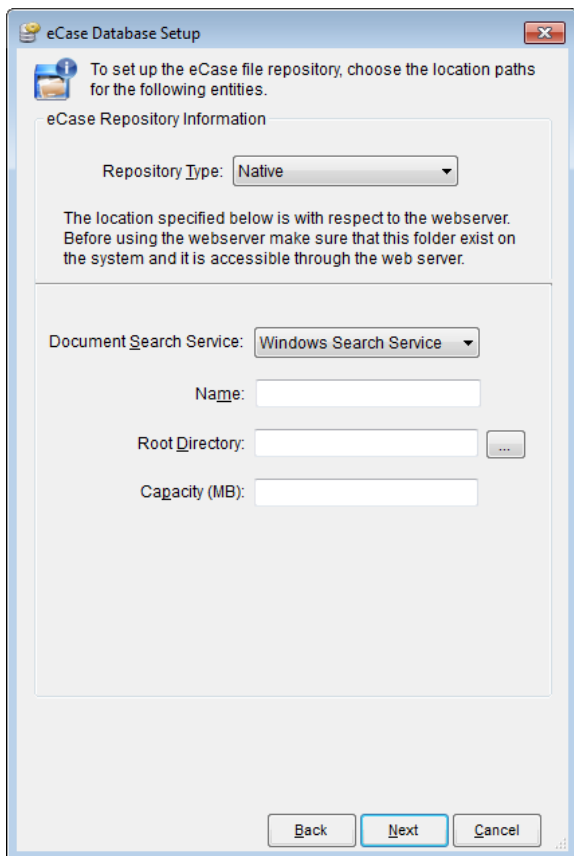
1. Launch the Control Panel, click **Index Options**, and then click **Modify**.
2. Remove all locations in the index except the eCASE Native DMS file storage location.

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.


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 \\ServerName\DMS. 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.
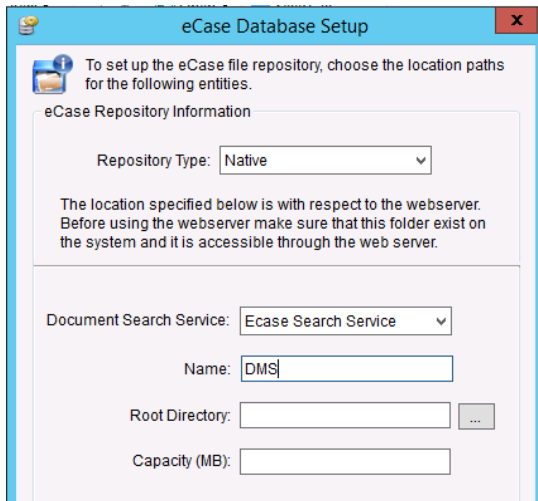2. Go to **Configuration > Create eCASE Database > SQL Server**.
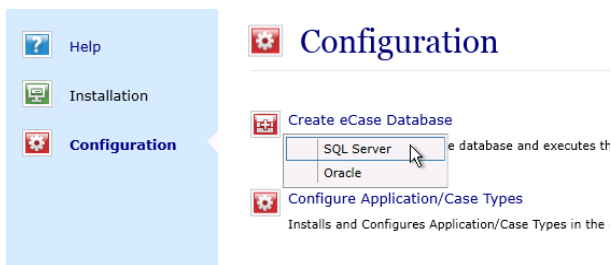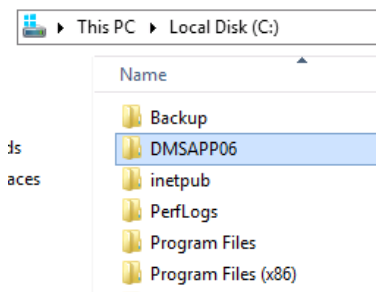

3. Provide **DB Info**.
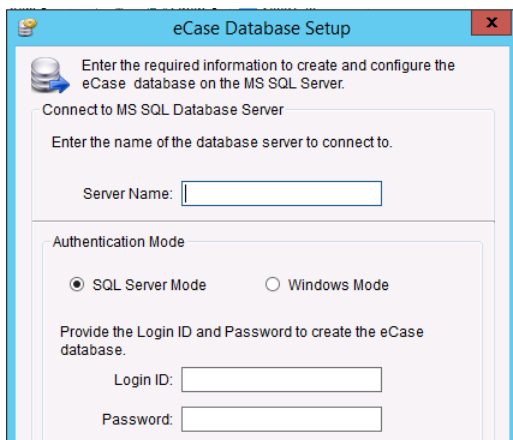
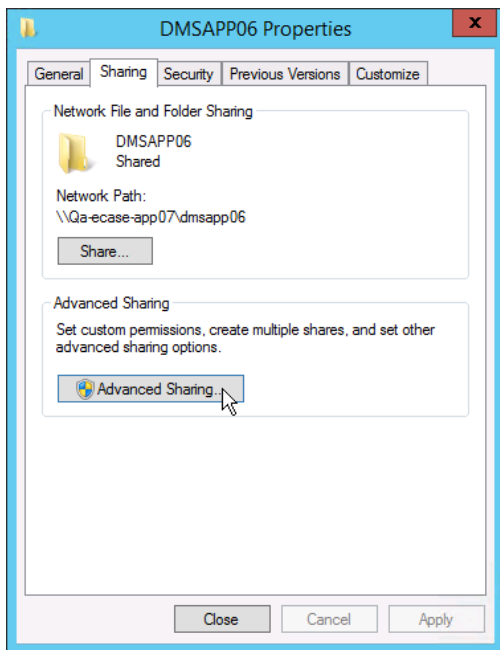4. Select **Native** and **eCASE Search Service**.

5. Create DMS folder from a different server.
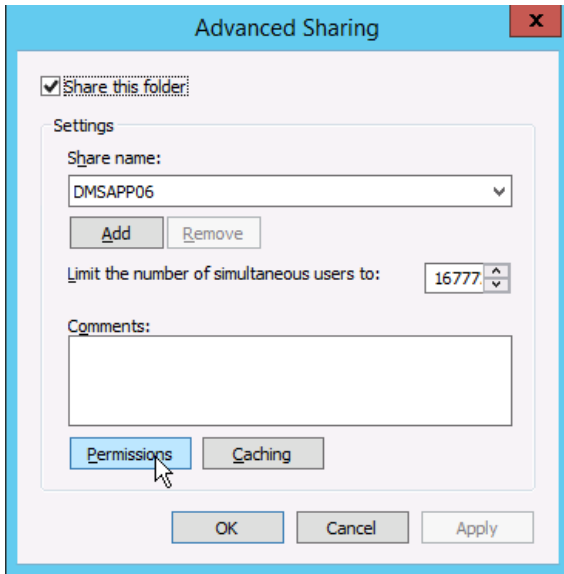

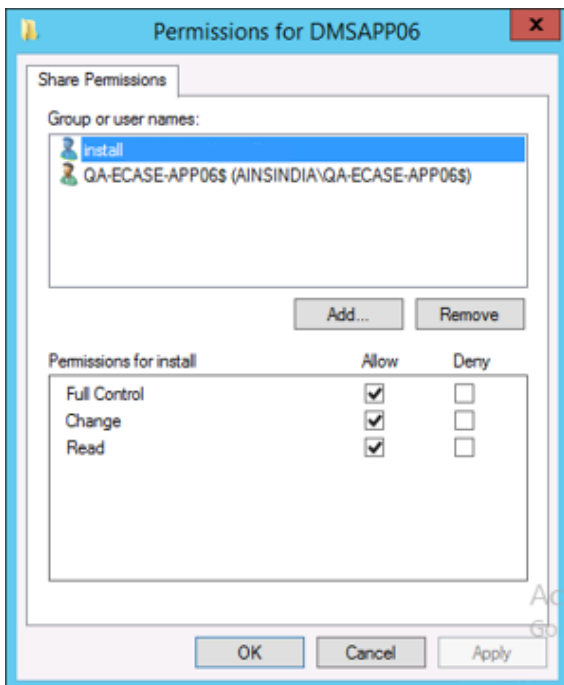6. Right-click on **Properties > Sharing > Advanced Sharing**.
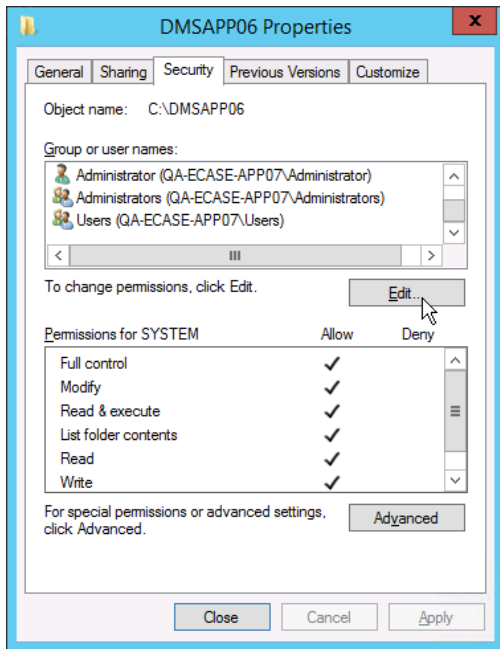

7. Click **Permissions**.

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

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

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