

# FOIAXpress



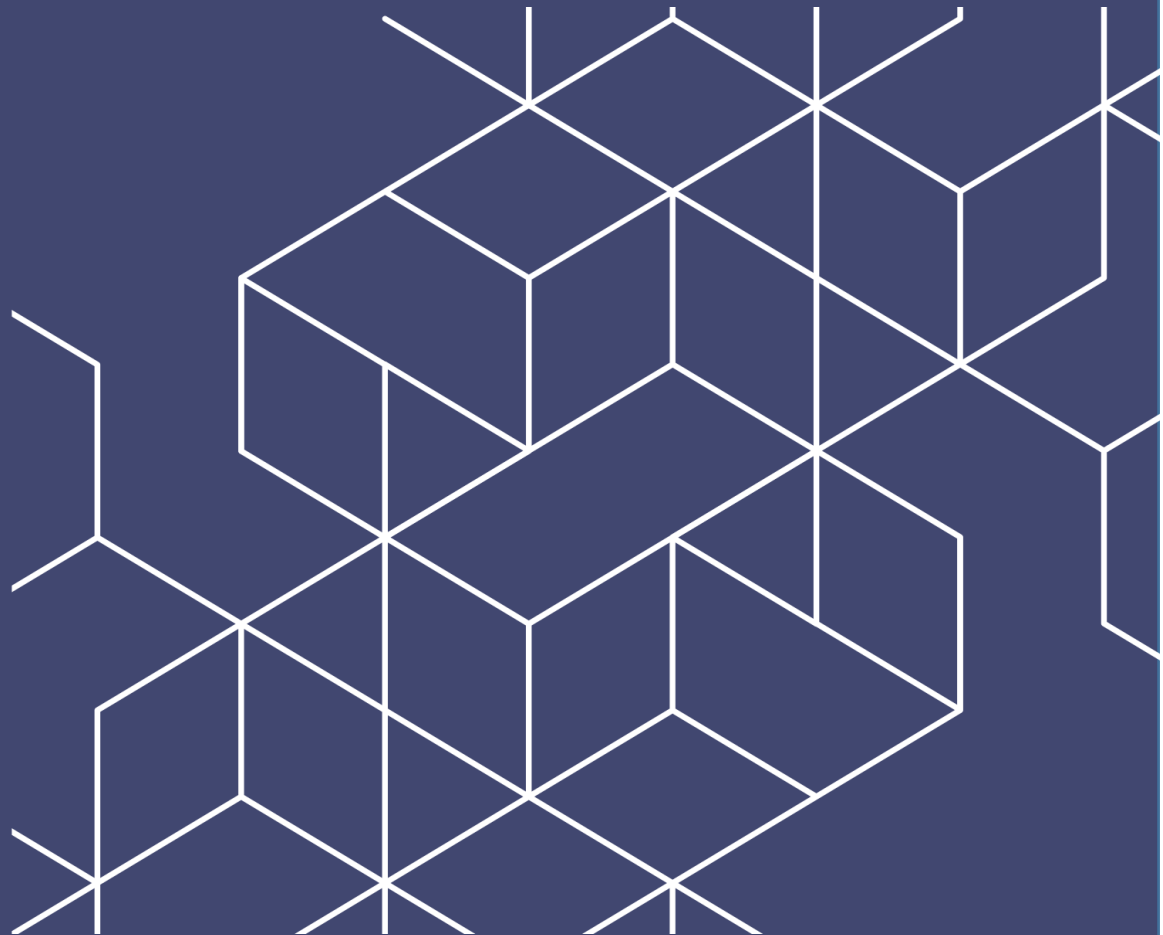
OPEXUS

## Collaboration Portal Deployment Manual

Version 1.2

v11.1.0

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# FX 11.1.0 Collaboration Portal Deployment Manual

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## Version History

#	Date	Description
1.0	3/1/2023	New document for v11.1.0
1.1	4/10/2023	Updated the Deployment System Requirements to specify compatibility with only Windows 2016 and 2019.
1.2	5/3/2023	<ul style="list-style-type: none"><li>• Updated <i>Deployment System Requirements</i> (2.1) to include the required Microsoft Visual C++ Redistributable.</li><li>• Updated <i>Install SQL Server Module</i> (2.2) to include steps to unblock the .zip file</li><li>• Updated <i>Download the Installation Package</i> (3) to include steps to unblock the .zip file</li></ul>



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# 1 FOIAXpress Collaboration Portal Deployment Introduction

The purpose of this document is to provide instructions for deploying the Collaboration Portal within your FOIAXpress environment.

The FOIAXpress Collaboration Portal facilitates document reviews with users outside of your FOIAXpress environment. With the Collaboration Portal, FX users can send document requests to outside users, and responsive documentation provided in response can be added to your FX Document Management and in subsequent request responses.

## 1.1 About This Document

This manual is intended to guide system administrators through the required steps to deploy FOIAXpress Collaboration Portal within their organization, including both new installations and upgrades.

## 1.2 FOIAXpress Collaboration Portal Installation Package

The FOIAXpress installation package is a zip file containing all the files needed to install FOIAXpress Collaboration Portal. Your customized installation is driven by the values set in the *Inputs.Json* file located at the root of directory where the zip file is extracted.

Contact OPEXUS support at [support@opexustech.com](mailto:support@opexustech.com) for your installation package.

## 1.3 Deployment Procedure

Deploying FOIAXpress Collaboration Portal follows the procedure outlined below. Each step is covered in the subsections in this manual.

1. Download and verify the installation package, then extract the files.
2. Update the Inputs.json file with your deployment details.
3. Run Install.ps1



## 2 Collaboration Portal Installation Prerequisites

### 2.1 Deployment System Requirements

The installation package must be deployed from the application server, which must meet the requirements outlined below:

Requirement	Description
<b>Location</b>	Deployment scripts can be executed from Application server. The script must be executed from application server if the Application or Scheduler are installed.
<b>User Permissions</b>	The logged-in user should have the local administrator permissions.
<b>Operating System Requirements</b>	Windows 2016/2019
<b>URL Rewrite</b>	Install the Microsoft IIS URL Rewrite extension, available via <a href="https://www.iis.net/downloads/microsoft/url-rewrite">https://www.iis.net/downloads/microsoft/url-rewrite</a>
<b>Microsoft .NET Framework 4.8 Runtime</b>	Microsoft .NET Framework 4.8 Runtime must be downloaded and installed. It can be downloaded and installed from the following location: <a href="https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48">https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48</a>



Requirement	Description
<b>SqlPackage</b>	<p>The SqlPackage must be downloaded and installed. It can be downloaded and installed from the following location:</p> <p><a href="https://learn.microsoft.com/en-us/sql/tools/sqlpackage/sqlpackage-download?view=sql-server-ver16#windows-net-framework">https://learn.microsoft.com/en-us/sql/tools/sqlpackage/sqlpackage-download?view=sql-server-ver16#windows-net-framework</a></p>
<b>SqlServer</b>	<p>The SqlServer module must be downloaded and installed on the application server. See the <i>Install SQL Server Module</i> section for steps.</p>
<b>PowerShell Version</b>	<p>PowerShell 5.1.22621.963 must be installed for deployment using auto deployment.</p> <p><a href="https://www.microsoft.com/en-us/download/details.aspx?id=54616">https://www.microsoft.com/en-us/download/details.aspx?id=54616</a></p>
<b>Microsoft Visual C++ Redistributable</b>	<p>The Microsoft Visual C++ Redistributable must be downloaded and installed on the application server for all new FX installs.</p> <p><b>(!!) Note: Both executables below must be downloaded and installed.</b></p> <p><a href="https://download.microsoft.com/download/1/6/5/165255E7-1014-4D0A-B094-B6A430A6BFFC/vcredist_x86.exe">https://download.microsoft.com/download/1/6/5/165255E7-1014-4D0A-B094-B6A430A6BFFC/vcredist_x86.exe</a></p> <p><a href="https://download.microsoft.com/download/1/6/B/16B06F60-3B20-4FF2-B699-5E9B7962F9AE/VSU_4/vcredist_x86.exe">https://download.microsoft.com/download/1/6/B/16B06F60-3B20-4FF2-B699-5E9B7962F9AE/VSU_4/vcredist_x86.exe</a></p>

## 2.2 Install SQL Server Module

Follow the steps below to install the SQL Server Module on the application server:

1. Navigate to the following link:  
<https://www.powershellgallery.com/packages/SqlServer/21.1.18256>
2. Under *Installation Options*, select **Manual Download**:





## Download the Installation Package

### Installation Options

Install Module

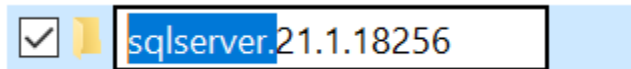
Azure Automation

Manual Download

Manually download the .nupkg file to your system's default download location. Note that the file won't be unpacked, and won't include any dependencies. [Learn More](#)

Download the raw nupkg file

3. Click **Download the raw nupk file**. The SQLserver .nupkg file downloads.
4. Locate the downloaded "SQLserver" file, then right click it and select **Properties**.
5. On the *General* tab, select **Unblock**, then click **Apply**.
6. Next, edit the "SQLserver" file extension from .nupkg to **.zip**.
7. Extract the .zip package in the downloaded location. After the folder is extracted, remove "sqlserver." from the folder name:









8. Navigate to `C:\ProgramFiles\WindowsPowerShell\Modules` and create a folder called **SqlServer**.
9. Copy the renamed .zip folder from the downloaded location to the *SqlServer* folder created in the previous step (`C:\ProgramFiles\WindowsPowerShell\Modules\SqlServer`)





## 3.2 About the Installation Package

There are two primary files you'll interact with during installation:

<input type="checkbox"/> Name	Type
 Collaboration	File folder
 dbscripts	File folder
 installscripts	File folder
 inputs <b>1</b>	JSON File
 install <b>2</b>	Windows PowerShell Script
 uninstall	Windows PowerShell Script

1. *Inputs.json*: Drives the installation of the Collaboration Portal components. The file is in a standard json format and needs to remain a valid json file for successful installation.
2. *Install.ps1*: The executable file you will run to deploy the installation package with the parameters configured in the Inputs.json file.

## 4 Inputs.Json Settings for Installation

### 4.1 About the Inputs.json File

The Inputs.json file located in the root directory of the extracted deployment package zip file drives the installation of the different components of the FOIAXpress Collaboration Portal. The file is in a standard json format and needs to remain a valid json file post updates prior to the installation.

The settings are grouped into sections, each addressing settings which may or may not require configuration, depending on your specific installation. The following subsections in this chapter describe each section of the Inputs.Json file.

The parent node is the 'inputs' section. This section appears as follows:

```
{
  "inputs": {
    "InstallType": {
      "New": "N",
      "Upgrade": "Y"
    },
    "Components": {
      "APP": "Y",
      "DB": "N"
    }
  },
}
```

Each section has parameters you can adjust to configure your installation. An example section is shown below, with an explanation for how it works:

Each (1) *Section* ("InstallType" in this example) includes various (2) *Settings* ("New" in this example) to configure.

```
{
  "inputs": {
    1 "InstallType": {
      2 "New": "N",
      "Upgrade": "Y"
    },
    "Components": {
      "APP": "Y",
      "DB": "N"
    }
  },
}
```

**A**      **B**

For each (**A**) Setting ("Upgrade" here), you can edit the (**B**) text in quotations ("N" here to indicate "No") to configure the settings for your installation. This might include adding a file path, user name, password, or simply a "Y" or "N" depending on the field you are configuring.



The first section under the parent node is the Install Type. See the following section for details on configuring your install type, with the remaining sections following in the order they appear in the Inputs file.

## 4.2 Install Type

Use the “InstallType” section to determine if this is a new installation, or an upgrade for an existing system:

```
"inputs": {
  "InstallType": {
    "New": "Y",
    "Upgrade": "N"
```

Setting	Description
<b>New</b>	Determine whether this is a new installation. For new installations this should be a “Y” value
<b>Upgrade</b>	Determine whether this is an upgrade for an existing application. For new installations this should be a “N” value

## 4.3 Install Components

The “Components” section allows you to determine which components to include with this installation. To include a component with your installation, be sure to assign the component a “Y” value on the corresponding line.:

```
"Components": {
  "APP": "Y",
  "SCHEDULER": "Y",
  "DB": "N"
```



Setting	Description
<b>APP</b>	Include the FOIAXpress Collaboration Portal in this installation procedure. This should be a “Y” value for new installations and upgrades if the applications needs to be installed or upgraded respectively.
<b>SCHEDULER</b>	Include the FOIAXpress Collaboration Portal Scheduler in this installation procedure. This should be a “Y” value for new installations and upgrades if the scheduler needs to be newly installed or upgraded respectively.
<b>DB</b>	Include the FOIAXpress Collaboration Portal Database in this installation procedure. This should be a “Y” value for new installations and upgrades if the database needs to be newly installed or upgraded respectively

## 4.4 Application and Scheduler

The “APPANDSCHEDULER” section has settings related to the Collaboration Portal application and scheduler installations. A value must be set for all values in this section to successfully install the application:

**(!!) Note: any files paths specified must have two backslashes where a path in windows explorer requires a single backslash.**

```
"APPANDSCHEDULER": {
  "InstallLocation": "C:\\Program Files (x86)",
  "BackupLocation": "C:\\temp\\backup",
  "CollabSSLCert": {
    "SSLPort": "443",
    "CertPath": "<<CERTIFICATE PATH>>",
    "CertPassword": "<<CERTIFICATE PASSWORD>>",
    "DNSName": "Collaboration"
  },
  "AppPool": "CollabAppPool"
```



Setting	Description
<b>InstallLocation</b>	Specify a path for the Collaboration Portal installation. Note this must be a file path for the .json file the execute.
<b>BackupLocation</b>	Specify a path for the Collaboration Portal backup location. Note this must be a file path for the .json file the execute
<b>SSLCert</b>	The following lines contain the SSL Certificate information. No data is required on this line. This is the grouping for SSL Certification settings to be used for the installation.
<b>SSLPort</b>	The network port designated for your application's secure communications using SSL.
<b>CertPath</b>	Specify a path where the .pfx certificate file is located. Note this must a file path for the .json file to execute
<b>CertPassword</b>	Enter the password associated with the certificate linked in the "CertPath" field
<b>DNSName</b>	Enter the Domain Name System (DNS) name for the domain associated with the application.
<b>AppPool</b>	Enter the name of the application pool associated with your FOIAXpress Collaboration Portal,

## 4.5 Database Settings

The "DB" section contains the settings for installing or upgrading your Collaboration Portal database. In case of a new installation, an agent account will be created.



```

"DB": {
  "DBServer": "<<DATABASE SERVER NAME>>",
  "DBName": "<<DATABASE NAME>>",
  "CreatorDBUserId": "<<DB CREATER USER ID>>",
  "CreatorDBUserPassword": "<<DB CREATER USER ID PASSWORD>>",
  "IntegratedSecurity": "N",
  "AgentAccount": "<<AGENT NAME TO CONNECT COLLAB DB>>",
  "AgentAccountPassword": "<<AGENT PWD>>",
  "AgentAccountIntegratedSecurity": "N"
}

```

Setting	Description
<b>DBServer</b>	Name assigned to the server responsible for storing, retrieving, and managing Collaboration Portal data
<b>DBName</b>	Name given to the specific database used for FOIAXpress Collaboration Portal
<b>CreatorDBUserID</b>	Database User ID to be used for this installation. The CreatorDBUserId should have admin rights with the ability to create a new database or database object on the specified Database server
<b>CreatorDBUserPassword</b>	Password associated with the account used in the "CreatorDBUserID" field
<b>IntegratedSecurity</b>	The Integrated Security property instructs the SQL Client to connect to SQL Server using Windows Authentication through the Security Support Provider Interface (SSPI). Use "Y" or "N" to determine if you are using Integrated Security in this installation.
<b>AgentAccount</b>	The SQL server login account to be created in case of a new database install or the login already setup for the database being upgraded



Setting	Description
<b>AgentAccountPassword</b>	The SQL server Agent Account password specified in the AgentAccount setting
<b>AgentAccountIntegratedSecurity</b>	Whether integrated security should be used when connecting to the database, default is "N"

## 4.6 File Repository Settings

The "FileRepository" section contains the setting for different file paths used by the Collaboration Portal to store files.

```
"FileRepository": {
  "Documents": "<<Documents Path>>",
  "Correspondence": "<<Correspondence Path>>"
}
```

Setting	Description
<b>Documents</b>	Enter the file path location for the Documents repository.
<b>Correspondence</b>	Enter the file path location for the Correspondence repository

## 4.7 Authentication Settings

The "Authentication" section contains settings needed for FOIAXpress to authenticate using FORMS authentication after the application is installed:



```

"Authentication": {
  "Type": "FORMS",
  "//Type Comment": "Type can be one of these FORMS,SSO,EAUTHENTICATION",
  "Forms": {
    "MembershipProvider": "DATABASE",
    "//MembershipProvider Comments": "MemberProvider can be one of these DATABASE,LDAP",
    "LdapAccountUsername": "",
    "LdapAccountPassword": "",
    "LdapUrl": "",
    "LdapSynchronizeAdUsersUserName": "",
    "LdapSynchronizeAdUsersPassword": "",
    "LdapSynchronizeAdUsersUrl": ""
  },
  "eAuthentication": {
    "eAuthenticationLogoutUrl": ""
  }
}

```

Setting	Description
<b>Type</b>	Enter the type of authentication used. Options include FORMS, SSO, and EAUTHENTICATION.
<b>Type Comment</b>	Lists the authentication Types that can be entered in the field above (FORMS, SSO, and EAUTHENTICATION).
<b>Forms</b>	The Forms authentication fields are listed in this subsection. These only need to be filled in if using FORMS authentication.
<b>MembershipProvider</b>	Enter the membership provider type. Options include DATABASE or LDAP.
<b>MembershipProvider Comments</b>	Lists the membership provider types that can be entered in the field above (DATABASE or LDAP).
<b>LdapAccountUsername</b>	Username associated with the LDAP account used for authentication.



Setting	Description
<b>LdapAccountPassword</b>	Password associated with the LDAP account username used in the field above.
<b>LdapUrl</b>	URL associated with the LDAP server
<b>LdapSynchronizeAdUsersUserName</b>	LDAP User Name
<b>LdapSynchronizeAdUsersPassword</b>	LDAP Password
<b>LdapSynchronizeAdUsersUrl</b>	LDAP URL
<b>eAuthentication</b>	eAuthentication details are included in this subsection (if eAuthentication is the selected authentication type).
<b>eAuthenticationLogoutUrl</b>	Redirect URL for users when logged out using eAuthentication.

## 4.8 SMTP Server Settings

The “SMTPServer” section contains setting for the application’s mail server:

```
"SMTPServer": {
  "Address": "0.0.0.0",
  "PortNo": "25"
```

Setting	Description
<b>Address</b>	Address of the server responsible for sending email messages from the FOIAXpress application.



Setting	Description
<b>PortNo</b>	Port number associated with the SMTP server entered in the “Address” setting

## 4.9 Configuration

The “Configuration” section contains settings for initial install configuration, setting up the basic details required to log in and get started in the Collaboration Portal. This account is the primary administrator account for the application:

```

"Configuration": {
  "AdminUser": {
    "Login": "Admin",
    "Password": "<<PASSWORD>>",
    "FirstName": "Admin",
    "LastName": "Admin",
    "Email": "<<EMAIL ID>>"
  },
  "Organization": {
    "Name": "<<ORGANIZATION NAME>>",
    "OfficeName": "<<OFFICE NAME>>",
    "OfficeCode": "<<OFFICE CODE>>"
  },
  "FiscalYear": {
    "CurrentFY": "2023",
    "Starts": "10/01/2022",
    "Ends": "09/30/2023"
  },
  "ActType": {
    "ATIAPA": "N",
    "FOIP": "N",
    "FIPPA": "N"
  }
}

```

Setting	Description
<b>AdminUser</b>	This subsection allows you to configure the basic details and sign in information for the initial Admin user account you’d like to create in the system.



Setting	Description
<b>Login</b>	Enter the username you'd like to assign for the first Admin application user.
<b>Password</b>	Enter a password for the Admin account associated with the username you entered above.
<b>FirstName</b>	Enter the first name you'd like to associate with this Admin account
<b>LastName</b>	Enter the last name you'd like to associate with this Admin account
<b>Email</b>	Enter an email address for this Admin account.
<b>Organization</b>	Use this subsection to provide your basic organization details.
<b>Name</b>	Enter a name for your organization, as it should appear in the system.
<b>OfficeName</b>	Provide an initial office name for an organization office. You'll be able to add more offices in the application configuration.
<b>OfficeCode</b>	Enter a system code assigned to this office, to assist with request identification and assignment.
<b>FiscalYear</b>	Use this subsection to configure the fiscal year details for your application
<b>CurrentFY</b>	Enter the current fiscal year used in your application in "YYYY" format (e.g., "2023")
<b>Starts</b>	Provide a start date for your fiscal year in MM/DD/YYYY format (e.g., "01/01/2023")



## Inputs.json Settings for New Installations

Setting	Description
<b>Ends</b>	Provide an end date for your fiscal year in MM/DD/YYYY format (e.g., "12/31/2023")
<b>ActType</b>	This field is not applicable for FOIAXpress. Do not edit or remove this field.
<b>ATIAPA</b>	This field is not applicable for FOIAXpress. Do not edit or remove this field.
<b>FOIP</b>	This field is not applicable for FOIAXpress. Do not edit or remove this field.
<b>FIPPA</b>	This field is not applicable for FOIAXpress. Do not edit or remove this field.



## 5 Inputs.json Settings for Upgrade

This section discusses the inputs.json settings used when upgrading an existing FX Collaboration Portal. For information on using the inputs.json file, see the *About the Inputs.json File* section of this manual.

**(!!) Note: Some fields that would be required for a new installation should be left as-is for an upgrade. It is important to not edit or remove these fields as this could compromise the integrity of the inputs.json file. These are described where appropriate in the following sections.**

### 5.1 Install Type

Use the “InstallType” section to determine if this is a new installation, or an upgrade for an existing system:

```
"inputs": {  
  "InstallType": {  
    "New": "N",  
    "Upgrade": "Y"
```

Setting	Description
New	Determine whether this is a new installation. For upgrades this should be a “N” value
Upgrade	Determine whether this is an upgrade for an existing application. For upgrades this should be a “Y” value

### 5.2 Components

The “Components” section allows you to determine which components to include with this upgrade. If you included a component in your previous installation, be sure to assign the component a “Y” value on the corresponding line:



```
"Components": {
  "APP": "Y",
  "SCHEDULER": "Y",
  "DB": "N"
}
```

Setting	Description
<b>APP</b>	Include the Collaboration Portal application in this upgrade procedure. This should be a “Y” value for upgrades.
<b>SCHEDULER</b>	Include the Scheduler in this upgrade procedure. This should be a “Y” value for upgrades if the scheduler needs to be upgraded.
<b>DB</b>	Include the Database in this upgrade procedure. This should be a “Y” value for upgrades.

## 5.3 Application and Scheduler

The “APPANDSCHEDULER” section only requires input in the InstallLocation and BackupLocation fields.

**(!!) Note: All fields not listed above can remain as-is during an upgrade.**

```
"APPANDSCHEDULER": {
  "InstallLocation": "C:\\Program Files (x86)",
  "BackupLocation": "C:\\temp\\backup",
  "CollabSSLCert": {
    "SSLPort": "443",
    "CertPath": "<<CERTIFICATE PATH>>",
    "CertPassword": "<<CERTIFICATE PASSWORD>>",
    "DNSName": "Collaboration"
  },
  "AppPool": "CollabAppPool"
}
```

Setting	Description
<b>InstallLocation</b>	Specify a path for the application installation. Note this must be a file path for the .json file the execute.





Setting	Description
<b>BackupLocation</b>	Specify a path for the application backup location. Note this must be a file path for the .json file the execute.  <b>(!!) Note: The BackupLocation must exist in the specified file path</b>

## 5.4 Database Settings

The “DB” section contains the settings for installing or upgrading your Collaboration Portal database.

**(!!) Note: You do not need to edit the AgentAccount fields during an upgrade, these can remain as-is.**

```
"DB": {
  "DBServer": "<<DATABASE SERVER NAME>>",
  "DBName": "<<DATABASE NAME>>",
  "CreatorDBUserId": "<<DB CREATER USER ID>>",
  "CreatorDBUserPassword": "<<DB CREATER USER ID PASSWORD>>",
  "IntegratedSecurity": "N",
  "AgentAccount": "<<AGENT NAME TO CONNECT COLLAB DB>>",
  "AgentAccountPassword": "<<AGENT PWD>>",
  "AgentAccountIntegratedSecurity": "N"
```

Setting	Description
<b>DBServer</b>	Name assigned to the server responsible for storing, retrieving, and managing Collaboration Portal data
<b>DBName</b>	Name given to the specific database used for the Collaboration Portal.
<b>CreatorDBUserID</b>	Database User ID to be used for this installation. The CreatorDBUserId should have admin rights with the ability to create a new database or database object on the specified Database server



Setting	Description
<b>CreatorDBUserPassword</b>	Password associated with the account used in the “CreatorDBUserID” field
<b>IntegratedSecurity</b>	Use “Y” or “N” to determine if you are using integrated security in this installation

## 5.5 File Repository Settings

The “FileRepository” section contains the setting for different file paths used by the FOIAXpress application to store files.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.6 Authentication Settings

The “Authentication” section contains settings needed for FOIAXpress to authenticate using FORMS authentication after the application is installed. These fields can remain as-is during the upgrade.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.7 SMTP Server Settings

The “SMTPServer” section contains setting for the application’s mail server. These fields can remain as-is during the upgrade.

**(!!) Note: These fields can remain as-is during the upgrade.**

## 5.8 Configuration

The “Configuration” section contains settings for initial install application configuration, setting up the basic details required to log in and get started in the application. This account is the primary administrator account for the application.

**(!!) Note: These fields can remain as-is during the upgrade.**



## 6 Install Collaboration Portal

Before you are ready to run the Install.ps1 file, review the steps below to verify you've completed all the steps to this point:

- Ensure your system meets the minimum requirements.
- Make sure you have connectivity to the servers where the software is being installed.
- Download, verify, and extract the Collaboration Portal Installation package.
- Configure the Inputs.json file for your installation.

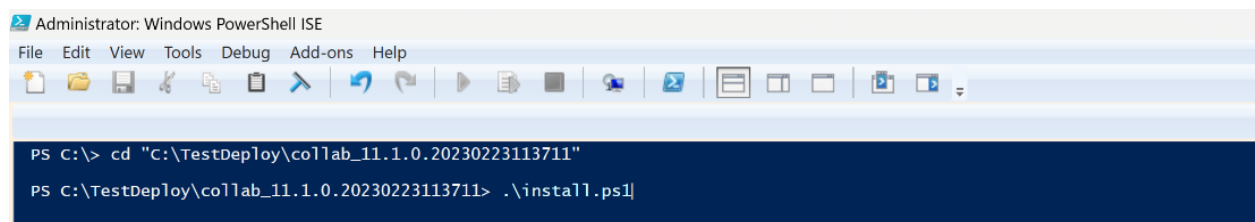
Once the above prerequisites are complete, follow the steps below to deploy the Collaboration Portal Installation package.

1. Open Windows Powershell ISE
2. Use PowerShell to navigate to the location where you extracted the installation package:



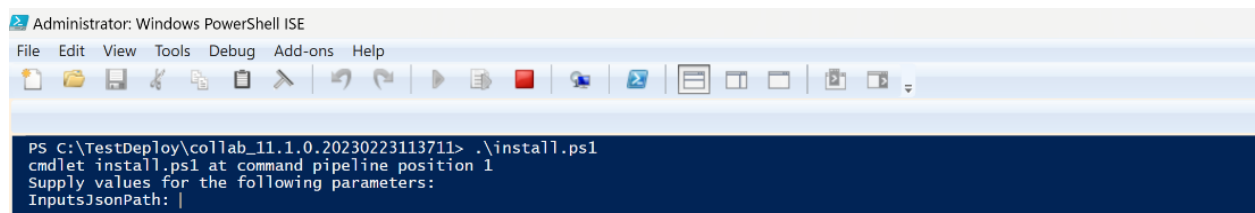
```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\> cd "C:\TestDeploy\collab_11.1.0.20230223113711"
```

3. Type `.\install.ps1` for either install or upgrade



```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\> cd "C:\TestDeploy\collab_11.1.0.20230223113711"
PS C:\TestDeploy\collab_11.1.0.20230223113711> .\install.ps1
```

4. If the inputs.json file is in same location as the extracted installation files, simply click enter to execute the installation. Alternatively, if you have file in different location provide this file location, then execute the script.



```
Administrator: Windows PowerShell ISE
File Edit View Tools Debug Add-ons Help
PS C:\TestDeploy\collab_11.1.0.20230223113711> .\install.ps1
cmdlet install.ps1 at command pipeline position 1
Supply values for the following parameters:
InputsJsonPath: |
```

5. The installation procedure executes. See the following section for post-installation procedures to verify the application deployed successfully.

