



CASE MANAGER 5.2 ARM SOLUTION

INSTALLATION GUIDE



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OVERVIEW AND PURPOSE

This Installation Guide provides detailed information on how to install Case Manager 5.1 onto a local area network. If you are new to Case Manager then it is important to read the next section on architecture carefully to understand how all of the different components work together.

ARCHITECTURE AND COMPONENTS

Case Manager is based on a client server architecture. Both the client and server require Windows to operate.

SERVER COMPONENTS

The Case Manager client components (called Case Manager Apps) require the following server components to be installed and running on the server. Also the network should allow traffic to these server components through on certain ports. See the section on [Enabling Access to the Server](#) to understand which network ports should be open on the server to allow traffic to pass from the client machines to Server Components on the server. A case manager server should only be running windows and Case Manager components. It is theoretically possible to run other applications on the server but not advisable.

CASE MANAGER MAIN FOLDER

The case manager software folder should be installed in the root of the server (C:\CaseManager or any other drive letter). This folder contains the following sub-folders.

CaseManagerApps: Contains all the user client apps.

CaseManagerAttachments: This is a shared folder which Case Manager uses to store attachments on the various cases in case manager. Every shared folder is a standard windows folder and any type of data can be copied and pasted into these folders. Each case on case manager has a unique folder which lives inside this attachment folder.

CaseManagerBackups: Whenever database backup files are created it will be stored in this folder. As part of your backups strategy you should move backups from this folder to an off-server and off-site location as soon as possible after a backup was made.

CaseManagerDatabases: Every case manager instance is related to a single case manager database which lives inside this directory. You can for example have a case manager database for your live work and also a test case manager database used for testing and training purposes. Each database will be accessed by using a different instance which is setup in the instance directory.

CaseManagerExtensions: Case manager allows for extensions (plug-ins) to be added to the systems. These extensions are packaged in a DLL and this is where the DLL is stored. Additional extensions can be developed for your environment.

CaseManagerInstanceDirectory: This folder is used by the instance directory to store related information if required.

CaseManagerLogs: This folder is used to store logs - for example TimeServer and QueueServer logs are stored here.

CaseManagerReports: Case Manager uses Crystal Reports for it's reports. Each report and document is defined as a .rpt file which is a template / specification for the report. These .rpt files are stored in this folder.

CaseManagerServerApps: Contains the installation files for applications to be installed on the server. Make sure to read the [section on server installation](#) before installing any server apps.

CaseManagerTools: This folder contains any scripts or additional utilities which could help you to operate your Case Manager data and environment easier. Support teams often add scripts that they create into this folder.

FIREBIRD

Case Manager uses Firebird 3.0 as a database to store all data except for attachments. You can learn more about Firebird at <https://firebirdsql.org/>.

INSTANCE DIRECTORY

The Instance Directory is a directory of all Case Manager databases available to Case Manager applications. The Instance Directory allows you to select instances (databases) from a user-friendly interface that makes the process of updating, restoring and upgrading databases simple. When logging into Case Manager applications it uses the Instance Directory to link the application to the corresponding database. You can for example have a Test and a Live instance. You also use the Instance Directory to Upgrade, Backup and Restore these databases. **You should only ever have one Instance Directory installed on a LAN.**

TIME SERVER

The Time Server is a central process which runs on the server which monitors and logs the amount of time agents spend on cases or on other administrative tasks. Every instance should have it's own Time and Queue server.

QUEUE SERVER

The Queue Server is a central process which works hand in hand with Case Manager. When you create a queue of work it is managed on the Queue Server and agents can pull from these queues. Every instance should have it's own Time and Queue server.

CASE MANAGER APPS

The Case Manager Apps are components used by various users - the purpose of each component is described below.

CASE MANAGER

The main system which will be used by agents to manage and work with accounts is simply referred to as Case Manager. Case Manager is an accounts receivable management solution with a focus on automating and streamlining case based processes. Version 1 of Case Manager was released in 1996 and the solution has been developed ever since.

CASE MANAGER BULK ACTION UTILITY

The Case Manager Bulk Action Utility gives administrators the ability to make changes to cases in bulk. This utility is extremely useful and can save days of work by automating large scale changes to tens of thousands of cases at a time.

CASE MANAGER CONFIGURATION TOOL

The Case Manager Configuration Tool is used by administrators to manage the Case Manager configuration.

CASE MANAGER CONTENT MANAGER

The Case Manager Content Manager is used to manage communication templates like SMS / Text Message templates.

CASE MANAGER IMPORT UTILITY

The Case Manager Import Utility is used to import data into case manager from excel spreadsheets and .csv text files. It can be used to import and update data.

CASE MANAGER INSTANCE DIRECTORY UTILITY

The Case Manager Instance Directory Utility is a tool administrators can use to setup and configure the Instance Directory Service. Note that the service is a separate installation and does not have a front-end - this utility is the front-end utility which gives administrators access to the case manager instance service to configure and manage Case Manager Instances.

CASE MANAGER WALL DASHBOARD

The Case Manager wall dashboard is a utility which will display various graphs one after the other. It is often used in a call centre to show statistics related to call centre performance.

OVERVIEW OF INSTALLATION STEPS

STEP 1: COPY THE CASE MANAGER MAIN FOLDER ON THE SERVER.

This folder is often just a zipped file and is unzipped and installed onto the root of the C or D drive on a server machine.

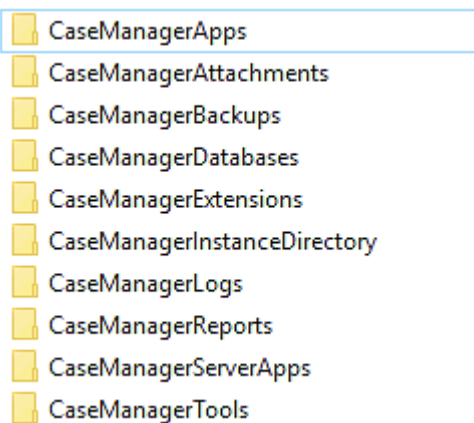


Figure 1: Case Manager folder content.

STEP 2: INSTALL THE SERVER COMPONENTS

See below for a detailed description on how to install the various server components.

STEP 3: ENABLE ACCESS FROM THE WORKSTATIONS TO THE SERVER

See below for a detailed description on what network access is required from the workstations to the server and how to enable it.

STEP 4: INSTALL CASE MANAGER APPS

See below for a detailed description on how to install the Case Manager Apps.

STEP 1 AND 2: INSTALL THE SERVER COMPONENTS

Before any Case Manager App will work on your local area network you need a working Case Manager Server environment.

ADD THE MAIN CASE MANAGER FOLDER

The main case manager folder should be unzipped and added to the root of either the C, D or some other drive letter on your server.

INSTALL THE FIREBIRD DATABASE

Case Manager ships with several versions of the Firebird database in the form of installable binary files which you can find in CaseManager\CaseManagerServerApps\CaseManagerServer. We suggest that you only install Firebird 3.0 at this stage. If your server supports 64 bit then install the 64 bit version of this server alternatively install the 32 bit version.

Very important: It is critical that you enable legacy security when installing the Firebird Database. If you do not have legacy access enabled then you need to uninstall Firebird and also delete all folders related to firebird - only once you install it again with legacy access enabled will Case Manager be able to access Firebird.

INSTALL THE TIME SERVER AND THE QUEUE SERVER

Every Instance should have it's own Time Server and Queue Server running. It is important to note that we do not *install* the Time and Queue Servers, we simply *run* them. Because you will have to start the Time Server and Queue Server every time the server restarts it makes things simpler to create a shortcut to these applications on the Desktop of your server - the process is simple.

Browse to:

C:\CaseManager\CaseManagerServerApps\CaseManagerQueueServer\CaseManagerQueueServer.exe

Right click the **CaseManagerQueueServer.exe** application and select **Send to > Desktop (create shortcut)** to create a shortcut to the Queue Server on your Desktop.

The process is exactly the same for the Time Server.

To now run the Time or Queue server right click on this shortcut and click on Run As Administrator.

INSTANCE DIRECTORY SERVICE INSTALLATION

The instance directory is both a service and an app. This section covers the installation of the Instance Directory Service.

Installing the Instance Directory Service should only be done on the server.:

1. The **Instance Directory Windows Service** - makes information about instances available on the local area network.

Unlike the Instance Directory Utility, the Instance Directory Service should only be installed on the server.

To install the Instance Directory Web Service

- Browse to: **C:\CaseManager\CaseManagerServerApps\CaseManagerInstanceDirectoryService**
- Run the **VoyagerNetzInstanceDirectory.WinService.Setup.exe** file.
- Click Next on the first two installation windows, then click Install and allow the installation to complete (Figure 10).

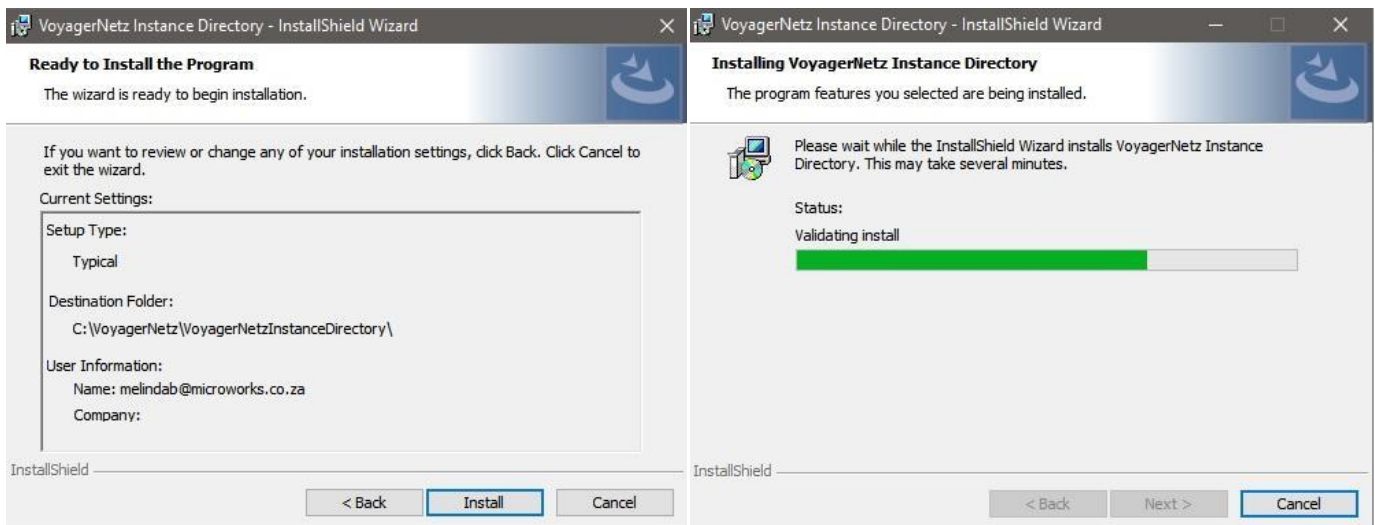


Figure 10: Instance Directory Web Service Installation windows.

To ensure that the service is running, open **Task Manager > Services > VoyagerNetz Instance Directory** and check that the status of the service is “Running” and not “Stopped” (Figure 11).

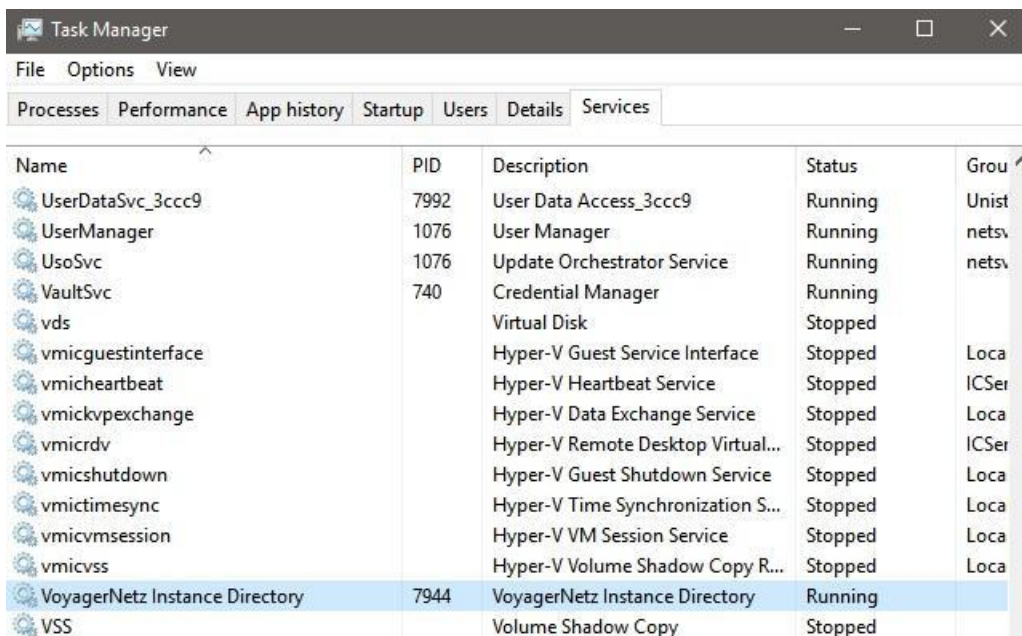


Figure 11: Task Manager > Services > VoyagerNetz Instance Directory.

The Instance Directory Service should now be successfully installed.

- The **Instance Directory Utility** - provides management of the Instance Directory Service and all the instance information. It also provides processes such as Backup and Restore capabilities, Database user verification, and Case Manager version upgrades. All Case Manager apps use the information broadcasted by the instance directory to help a user pick from and connect to the the available Case Manager instances.

To install the Instance Directory Utility:

- Browse to: **C:\CaseManager\CaseManagerApps\CaseManagerInstanceDirectoryUtility**
- Run the **setup.exe** file.
- Click **Install** and allow the installation to complete (Figure 8).

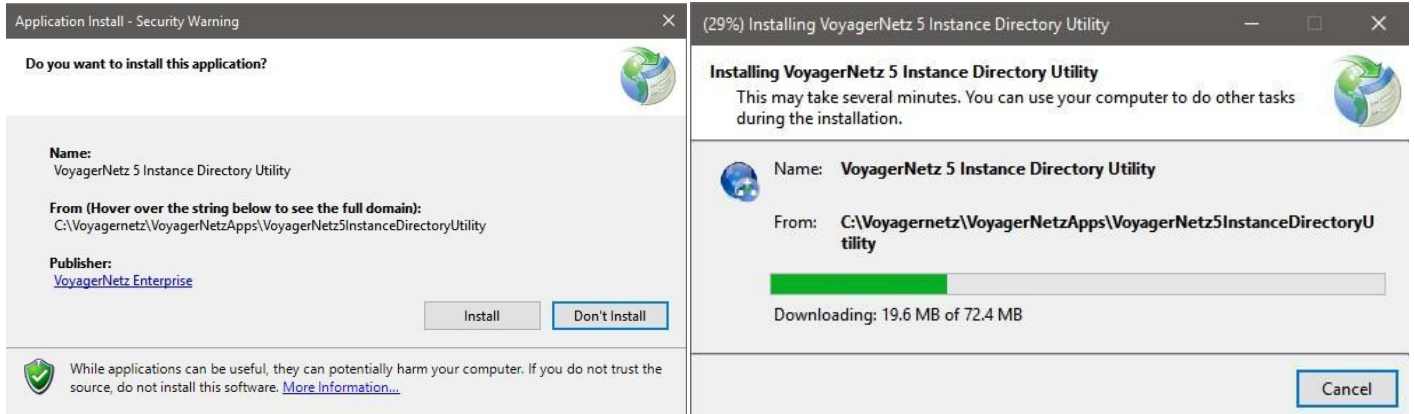


Figure 8: Instance Directory Utility Installation windows.

The Instance Directory Utility will open after installation is complete; however, it will not display any Discovered CaseManager Instances until the Instance Directory Web Service is installed (Figure 9):

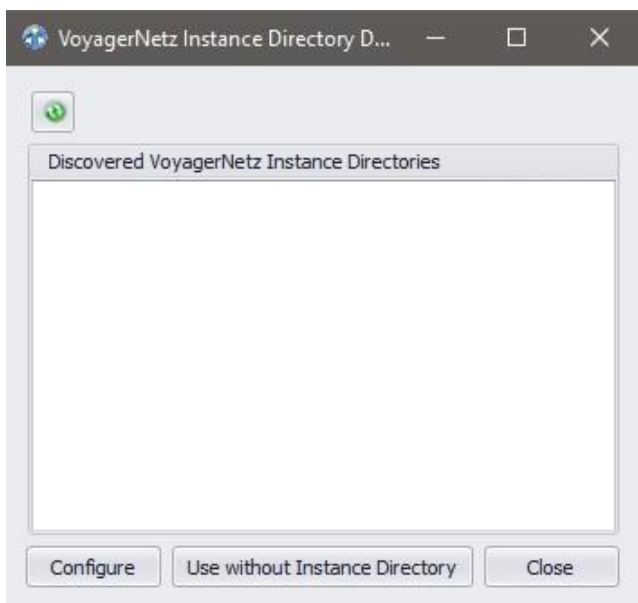


Figure 9: Instance Directory Utility interface.

STEP 3: ENABLE ACCESS TO THE SERVER FROM THE WORKSTATIONS

The workstations will need access to the following components through the network:

- Firebird database through port 3050.
- Time and queue server through port 3737.
- Read / Write access to the attachment folder by directly browsing to it.
- Read access to the Reports folder.
- Read access to the CaseManagerApps folder.

OPENING FIREWALL PORTS

Using the windows firewall setup inbound and outbound rules for TCP/IP for port 3050 and 3737.

SHARING FOLDERS

Grant Read / Write access to the server's

CaseManager\CaseManagerAttachments

folder for all agents who will be using Case Manager.

Grant Read access to the server's

CaseManager\CaseManagerReports

CaseManager\CaseManagerApps

folder for all agents who will be using Case Manager.

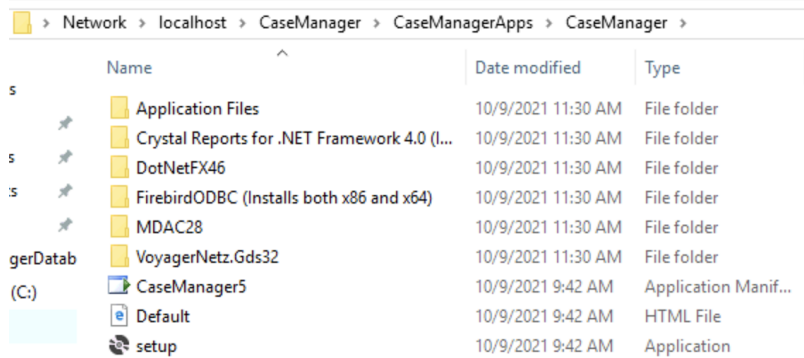
STEP 4: CASE MANAGER APPS INSTALLATION

Now that you have your Case Manager server installed as well as access to the server in place you can continue the process of setting up the different agent workstations. Depending on your needs you can install any of a number of Case Manager Apps. [Review the section on Architecture and Components for a brief description of every available component.](#)

INSTALL CASE MANAGER AND CASE MANAGER APPS

To install Case Manager, browse to the shared server location \\servername\CaseManagerApps. Depending on your server setup the process of browsing to this location might be different.

Every Case Manager application has an installation folder that looks similar to this:



Name	Date modified	Type
Application Files	10/9/2021 11:30 AM	File folder
Crystal Reports for .NET Framework 4.0 (I...	10/9/2021 11:30 AM	File folder
DotNetFX46	10/9/2021 11:30 AM	File folder
FirebirdODBC (Installs both x86 and x64)	10/9/2021 11:30 AM	File folder
MDAC28	10/9/2021 11:30 AM	File folder
VoyagerNetz.Gds32	10/9/2021 11:30 AM	File folder
CaseManager5	10/9/2021 9:42 AM	Application Manif...
Default	10/9/2021 9:42 AM	HTML File
setup	10/9/2021 9:42 AM	Application

You initiate the installation by double clicking on setup. During the installation you will be asked to verify installation of various components - once you have accepted and installed all of the components CaseManager will be installed on the computer and should be ready to use. This process is the same for all of the Case Manager Apps.

The following section describes the process in a bit more detail.

CASE MANAGER SETUP

The first component to be installed in the setup is **SAP Crystal Reports Runtime Engine for .Net Framework**. Click **Accept** to install the component (Figure 12):

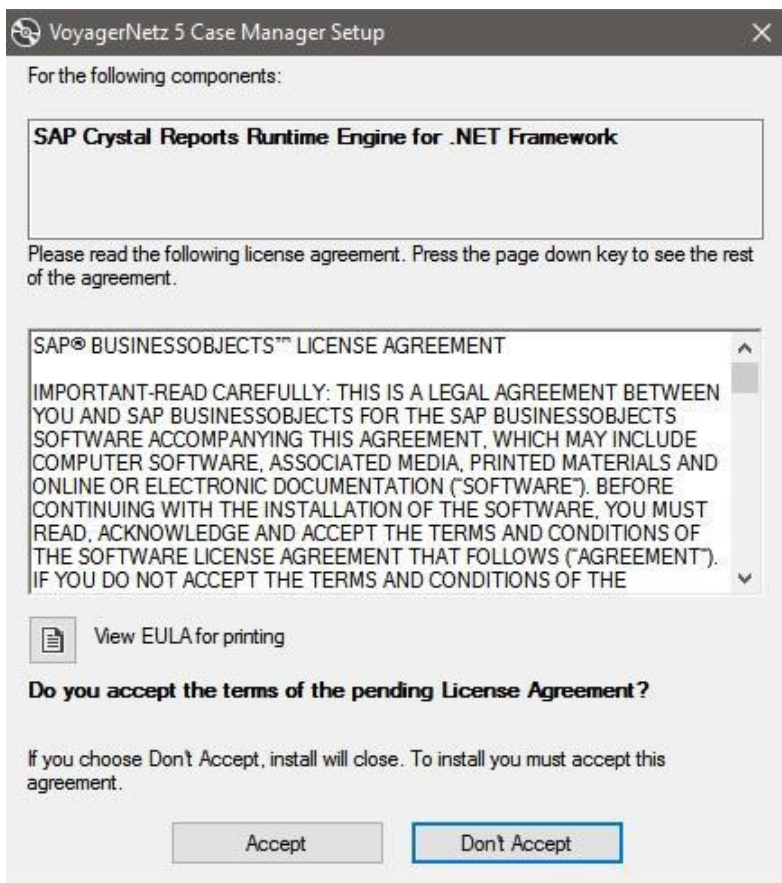


Figure 12: Case Manager Setup "SAP Crystal Reports Runtime Engine for .NET Framework" installation window.

The second component to be installed in the setup is **Firebird GDS32** (both the 64-bit and 32-bit versions). Click **Install** to install the component (Figure 13):

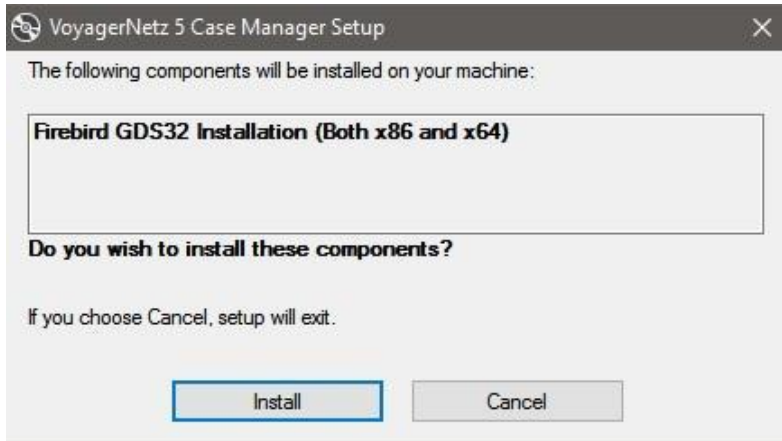


Figure 13: Case Manager Setup "Firebird GDS32" installation window.

Click **Next** and **Finish** until the installation of these components is complete.

The next step in the setup is the installation of Case Manager itself. Click **Install** and allow the installation to complete (Figure 14):

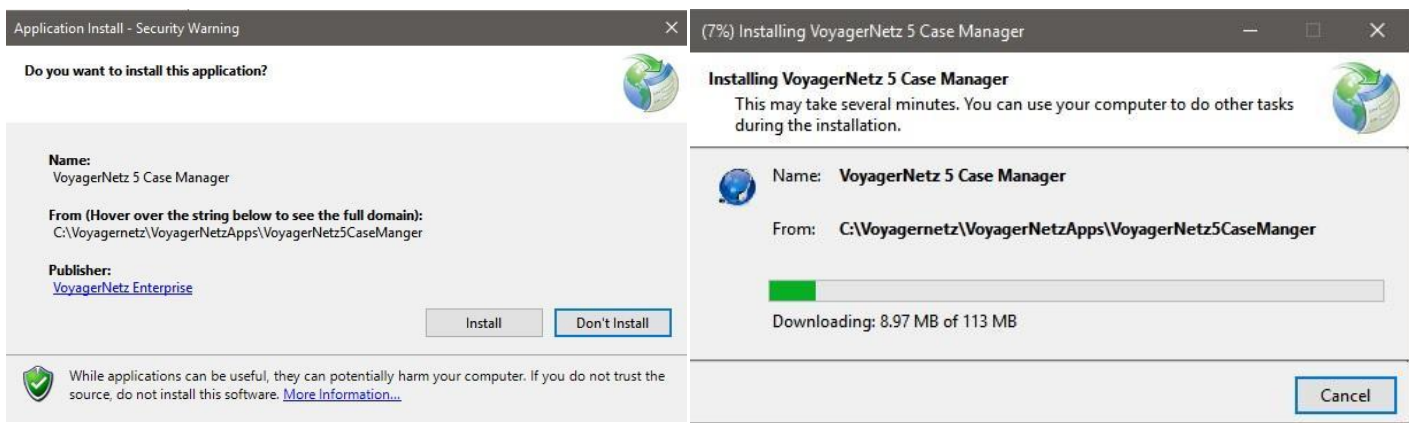


Figure 14: Case Manager installation windows.

Please note: The popup of the Case Manager installation windows is automatic and after the setup.exe has been run there will be no other installation files to run for Case Manager.

STEP 2: CONNECT TO AN INSTANCE

After installation is complete, you will need to select the Instance (database) on which you would like to work from the Instance Directory (Figure 15). This will need to be previously setup in the Instance Directory Utility.

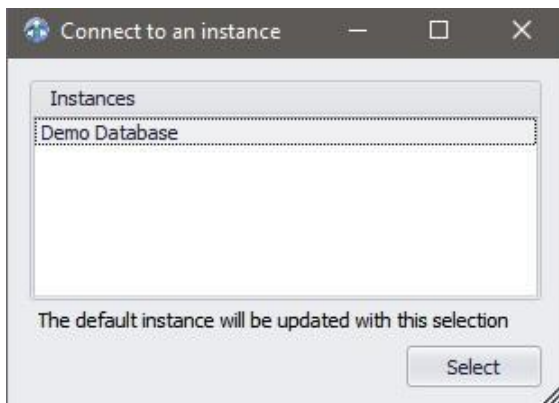


Figure 15: Instance Directory Instance selection.

LOGIN

The Case Manager Login screen should then open (Figure 16). You are almost ready to start using your Case Manager solution!

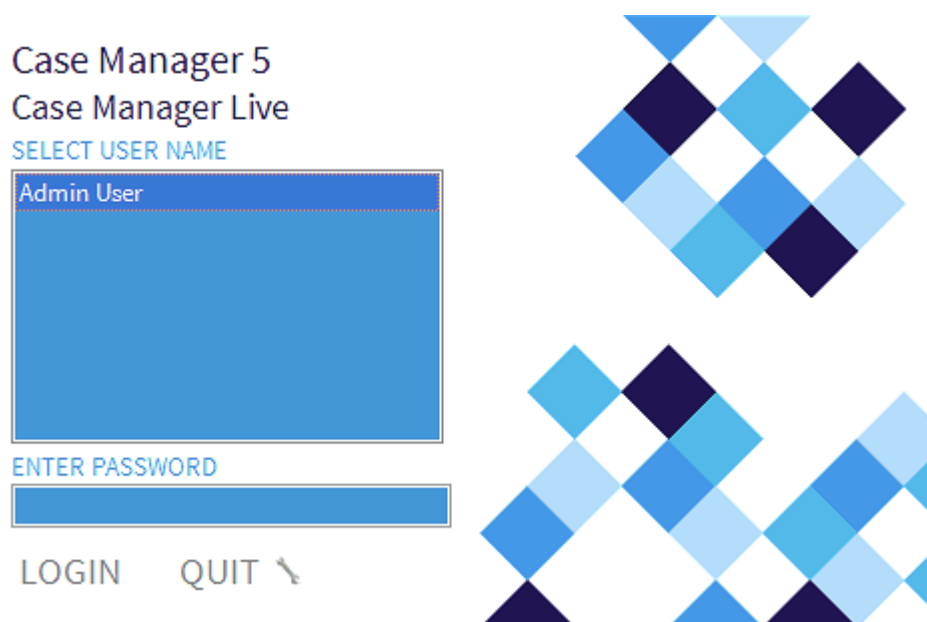


Figure 16: Case Manager Login screen.

CONFIGURATION TOOL INSTALLATION

The Case Manager Configuration Tool would typically only be installed on the server and the administrator's computer.

STEP 1: INSTALL THE CONFIGURATION TOOL

To install the Case Manager Configuration Tool:

- Browse to: **C:\CaseManager\CaseManagerApps\CaseManagerConfigurationTool**
- Run the **setup.exe** file and allow the installation to complete (Figure 17).

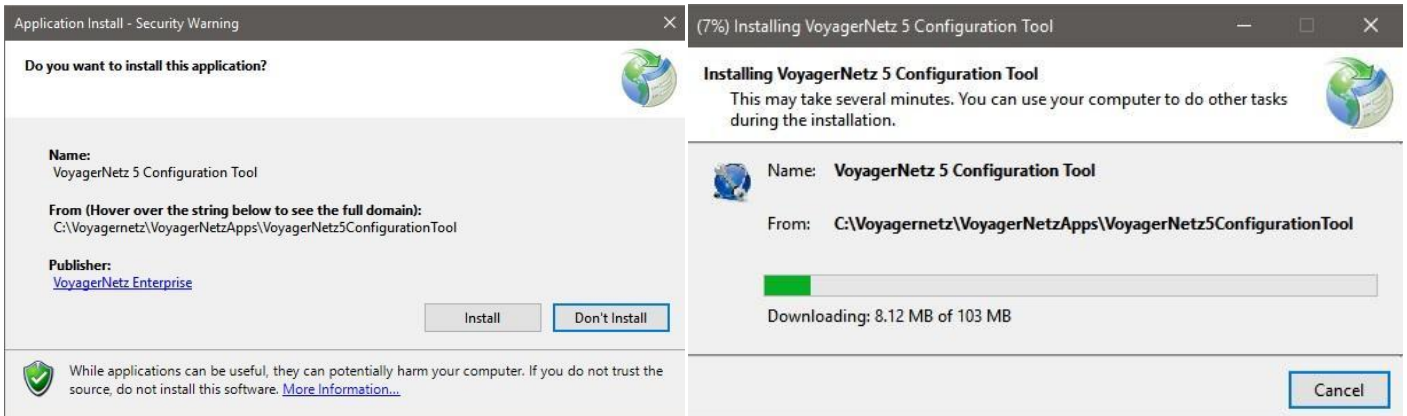


Figure 17: Case Manager Configuration Tool installation windows.

LOGIN

Once the installation is complete, the Case Manager 5.1 Configuration Tools Login screen will automatically open (Figure 18). This means it has installed successfully and you will now be able to perform the necessary setup procedures.

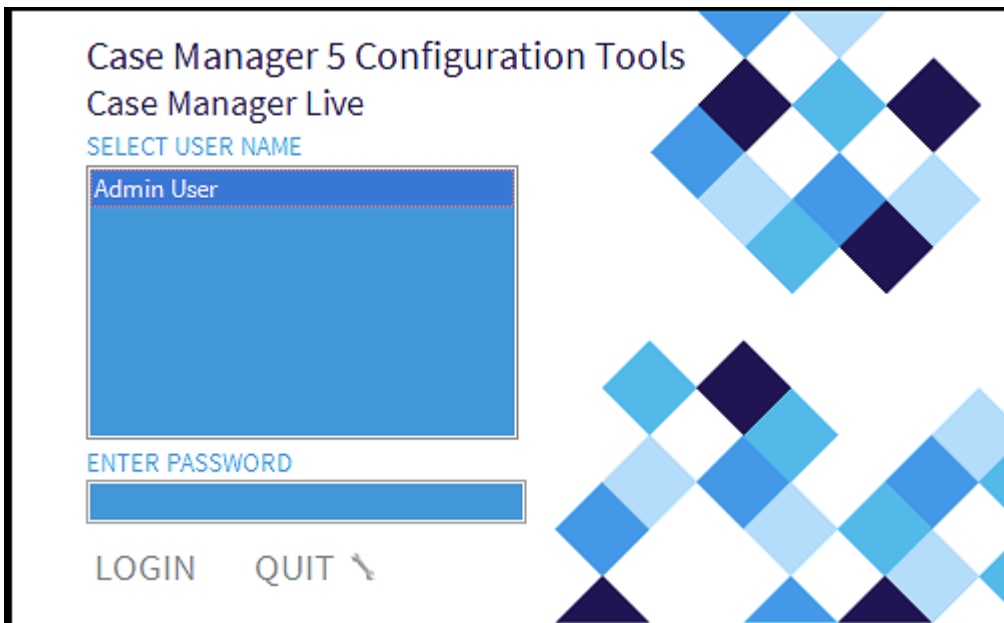


Figure 18: Case Manager 5 Configuration Tools Login screen.

STEP 2: CONFIGURATION TOOLS SETUP

Certain settings in the Configuration Utility must be correctly configured to ensure that Case Manager is functioning properly.

TROUBLESHOOTING

More than one instance directory

If when you login the system warns you that more than one Instance Directory is found then you have most likely installed more than one Instance Directory Service on your network. You should only have one Instance Directory Service on a local area network at any given point. The resolution is to find and uninstall the extra / unwanted Instance Directory Service.