

ATTACHMENT FTP EXTENSION

for Case Manager 5.2

Manual

With the early release of Case Manager 5.2 we've focussed on making our application stack available in the cloud to organizations that do not wish to host the application on a local network. A client-server infrastructure is still maintained in the environment, predominantly based on database interaction. There were however a couple of features that required file access to the server. As the application is built for a Microsoft Windows environment, this had an impact on licensing for the use of the operating system.

We're proud to announce the release of a Case Manager extension that allows FTP/SFTP access to the case attachments. FTP (File Transfer Protocol) is a standard protocol to transfer files over TCP/IP, a common communication protocol of local networks and the Internet. SFTP provides FTP functionality over SSH (Secure Shell). In older versions of the Case Manager application files attached to a case were accessed by an agent by means of a shared windows file location. This functionality was moved to a separate extension, "Attachment File Share", in version 5.2.1 which can now be replaced by the new "Attachment FTP" extension to access the attached files via the FTP protocol. Since a client-access license is not required for FTP access to the server, it can save Case Manager clients costs on operating system licensing.

[Installing the extension](#)

[Converting from Attachment File-Share Extension](#)

[About the FTP Server](#)

[Features](#)

[Settings](#)

[Case Action](#)

Installing the extension

A Case Manager extension is a single DLL file that extends the functionality in the system. The Attachment FTP Extension file is:

```
CASEMANAGER . EXTENSION . ATTACHMENTFTP . MERGED . DLL
```

Often the extension is distributed with a new Case Manager deployment in the CaseManagerExtensions folder. Should the extension not be available in this folder, it can be downloaded from casemanager.tech . Note that the extension requires at least version 5.2.2 of Case Manager.

1. In the Case Manager Configuration Tool, browse to the Extension Management section. The installed extensions are shown in a list.
2. Click Add and select the extension DLL file.
3. Confirm the extension to be installed.
4. The application will detect if a database installation is necessary and will ask confirmation from the user to continue with the database installation should it be necessary.
5. After the installation process completes, the Attachment FTP Extension will be shown in the list of installed extensions. The extension features will now be available in Case Manager.

After installing the extension it is recommended to set the FTP settings in the Extension Settings section in the Configuration Tool.

Converting from Attachment File-Share Extension

When moving from the Attachment File-Share Extension (functionality the same as pre-5.2.1 versions of Case Manager) to the Attachment FTP Extension, remove or disable the Attachment File-Share Extension in the Extension Manager section in the Configuration Tools. If the CaseManagerAttachments folder is exposed as an FTP site, a seamless transition will be possible: with the correct settings, no files will have to be moved to the new extension.

In Case Manager, the attachment button (from the previous extension) will be replaced by the new attachment button. If you make use of toolbar customizations, I suggest revisiting this customization after installation.

About the FTP Server

The Attachment FTP extension provides an internet-protocol mechanism for accessing case attachments in Case Manager.

- **FTP**

File Transfer Protocol is supported, that supports Basic Authentication only: that is, a username and password. When making use of Microsoft's IIS as FTP Server, you may have to create a specific Windows user for this, so that the user's access can be limited to only the necessary files. SSL connections are not supported by this extension. However, in general, access will only be over a local network, reducing the necessity for an encrypted channel.

- **SFTP**

SSH File Transfer Protocol is a secure file transfer protocol over Secure Shell. Basic authentication and private-key based authentication are supported. Making use of this protocol also enables case attachments managed in the cloud, such as on Microsoft Azure Blob Storage.

Features

Attachment FTP extends Case Manager with two features: a case action button which gives an agent access to the case's attachments, and extension-specific settings to set the necessary FTP/SFTP connection details.

Settings

Attachment FTP Settings

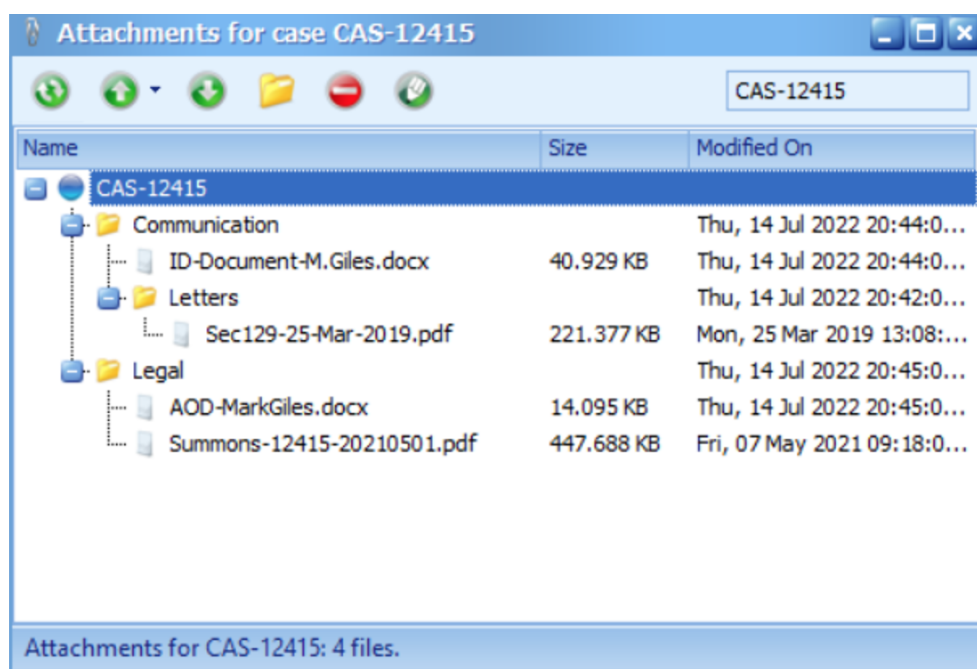
Settings

Protocol	SFTP
Host Name	casemanagersattachmentsserver
Port (0 for default)	default
Root Directory	/
Authentication Type	Private Key
User Name	casemanagersftpuser
Private Key	Private key loaded

The Attachment FTP settings can be accessed in the Configuration Tool in the Extension Settings section. In addition to the basic settings required for agent workstations to connect to the correct FTP location, a test action is available to verify whether the entered settings are correct.

- 1. Protocol** specifies the communication protocol to use. Currently FTP and SFTP are supported.
- 2. Host name** is the network name (or IP address) of the FTP Site.
- 3. Port** specifies the port to use when connecting. Leaving this value blank or 0, will make use of the default port for the protocol.
- 4. Root directory** specifies the path in the hosted site to use for attachments. Say for example, the CaseManagerAttachments directory is directly shared. Then this value will simply be “/”. If, however, a directory higher up the hierarchy is shared(say, the CaseManager directory), then the relative path to the attachments folder must be specified (“/CaseManagerAttachments”, in the example).
- 5. User name** specifies the username to connect to the site as per server setup.
- 6. Auth Type** is the authentication method that is to be used. Subject to protocol support of the server you are connecting to, password (basic authentication) and private key are supported.
- 7. Password** specifies the specified user’s password. The password is stored as an encrypted value in the database.
- 8. Private Key** file can be uploaded to the database when selecting the Private Key authentication method. The Private Key is stored as an encrypted value in the database.

Case Action



The extension adds a toolbar button to Case Manager which will open the attachments to the case, accessed via the selected protocol. A tree view of all the attached files will be shown to the user, along with the file size and last modified date. Basic file operations can be performed on the files - accessed by the toolbar buttons or context menu (right-click for context menu).

1. **Upload** - select a file or folder to attach to the case at the selected location in the file hierarchy.
2. **Download** - download the selected file or folder to a local file location.
3. **Create Directory** - create a new directory/folder at the selected location in the file hierarchy.
4. **Delete** - delete the selected file or folder from the attachments.
5. **Rename** - rename the selected file or folder in the attachments.

Files and folders can be moved to different positions in the attachment file hierarchy by dragging them to the desired location. To upload, files can also be dragged into the attachments, or pasted, from Windows explorer/desktop.

Opening and modifying files

With the older Attachment File Share, a shared folder as shared on a Windows server was opened for the agent. This allowed files to be opened directly.

With the new Attachment FTP Extension files are accessed through file transfer protocols, the agent will unfortunately not be able to directly open the file from the hosted location. When a file should be opened, it should be downloaded to a local folder. Similarly when changes are made to such a file, it will have to be uploaded to reflect the changes in the attached file.