

Brainware API

Installation Guide

Version: Foundation EP1

Written by: Documentation Team, R&D

Date: Thursday, December 17, 2020

Copyright

Information in this document is subject to change without notice. The software described in this document is furnished only under a separate license agreement and may be used or copied only according to the terms of such agreement. It is against the law to copy the software except as specifically allowed in the license agreement. This document or accompanying materials contains certain information which is confidential information of Hyland Software, Inc. and its affiliates, and which is subject to the confidentiality provisions agreed to by you.

All data, names, and formats used in this document's examples are fictitious unless noted otherwise. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright law, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Hyland Software, Inc. or one of its affiliates.

Hyland® and Hyland Software®, as well as Hyland product names, are registered and/or unregistered trademarks of Hyland Software, Inc. and its affiliates in the United States and other countries. All other trademarks, service marks, trade names and products of other companies are the property of their respective owners.

© 2020 Hyland Software, Inc. and its affiliates. All rights reserved.

Table of Contents

About the Brainware RESTful API	4
About the User Role	4
Prerequisites	4
<i>Internet Information Services</i>	4
<i>.NET Framework</i>	4
<i>Load Balancer</i>	4
About Brainware API Installation	4
<i>Install Brainware API</i>	4
<i>Modify the Database Connection String</i>	5
<i>Encrypt a Password for a Database Connection String</i>	5
Specify the Maximum Document File Size	6
Enable Method Logging	7
Specify the Token Expiry Time	7
Specify the Batch List Limit	7
Configure IIS	7
Configure Server Security for Brainware API	8
<i>Add the User Context in SQL Server</i>	9
<i>Verify the IIS Identity</i>	9
<i>Set Permissions for BAPI Installation Directory</i>	9
Configure Component Logging	10
About BrainwareApi.CommandLine.Client	10
Display the API Documentation	10
Update Brainware API	10

About the Brainware RESTful API

The Brainware RESTful API provides methods to upload and manage external documents. The uploaded documents are further processed by Runtime Server.

About the User Role

The Brainware API user must be a valid Brainware Intelligent Capture (BIC) user and have AEB or ADM role.

For more information, see "Users, groups, and roles" in the *Brainware Intelligent Capture Designer Help*.

Prerequisites

Internet Information Services

Brainware API requires that you have installed Internet Information Services (IIS) on your server or workstation. Before you install the Brainware API, verify that the following features are enabled in IIS.

- .NET Extensibility
- ASP.NET 4.5
- Windows Authentication

.NET Framework

Brainware API requires that you have installed .NET Framework 4.6 or later on your server or workstation.

Load Balancer

When using a load balancer, ensure to enable sticky sessions.

About Brainware API Installation

The Brainware API installation files are included in the Brainware Intelligent Capture setup package.

Install Brainware API

To install the Brainware API, complete the following steps.

Note:

You need to run the installation from a local directory.

1. Navigate to the **[Brainware Intelligent Capture setup directory]\BrainwareAPI** directory.
2. Optional. Copy the **[Brainware Intelligent Capture setup directory]\BrainwareAPI** directory to the workstation or server on which you want to install Brainware API.
3. Open **BrainwareApi_Installer.bat** with a text editor.
4. Search for the `InstallDir`, `AppPoolName`, `BrainwareApiAppName`, and `ServerApiPath` attributes and verify that the values correspond to your needs.

5. Save and close the file.
6. Run **BrainwareApi_Installer.bat** as an administrator.
7. Review the **Command Prompt** window for success or error messages.

Note:

If an error occurred, you can rerun **BrainwareApi_Installer.bat** as often as required.

8. [Modify the database connection string.](#)

Modify the Database Connection String

To modify the database connection string, complete the following steps.

1. From the *[Installation path]\BrainwareApiServer* directory, open **Web.config** in a text editor.
2. Search for the `<connectionStrings>` element.
3. For a SQL Server database, to connect using Windows integrated security, modify the following values.
 - Set `Data Source` to the required data source.
 - Set `Initial Catalog` to the SQL Server database catalog.
 - Remove `User ID=<UserID>;Password=<UserPassword>;`.
 - Set `Integrated Security` to SSPI.
4. For a SQL Server database, to connect using SQL Server authentication, modify the following values.
 - Set `Data Source` to the data source.
 - Set `Initial Catalog` to the SQL Server database catalog.
 - Set `User ID` to the service account user ID.
 - Set `Password` to the service account password.
5. For an ORACLE database, modify the following values.
 - Set `Data Source` to the data source.
 - Set `User ID` to the service account user ID.
 - Set `Password` to the service account password.
6. Optional. [Encrypt the password for a database connection string.](#)
7. Save and close the file.

Encrypt a Password for a Database Connection String

Password encryption in CONFIG files is optional, but highly recommended. To provide an encrypted password for the database connection in a configuration file, complete the following steps.

1. In the *[Installation path]\Brainware Intelligent Capture\bin* directory, create a new batch file and give it a meaningful name, such as **CreateEncryptedPassword.bat**.
2. Copy one of the following options to the batch file, replacing `MyPassword` with the password you want to encrypt.

Note:

The maximum character length for a password to encrypt using **RSA-1024** is 30.

The maximum character length for a password to encrypt using **RSA-3072** is 280.

- To encrypt the password using the internal RSA-3072 key, use the following option.

```
DstCrypt.exe /text "MyPassword" >> EncryptedPW_
InternalKeys3072.txt
```

- To encrypt the password using the internal RSA-1024 key, use the following option.

```
DstCrypt.exe /text "MyPassword" /keysize "1024" >> EncryptedPW_
InternalKeys1024.txt
```

3. Save and close the file.
4. In **Windows Explorer**, double-click the batch file.
5. From **[Installation path]\Brainware Intelligent Capture\bin**, open **EncryptedPassword.txt** in a text editor and copy the encrypted password to the clipboard.
6. Open the required configuration file in a text editor.
7. Search for the `<connectionStrings>` element.
8. In the `<add name>` element, set password as an asterisk.

Example

```
<add name="Entities" Password=*>
```

9. In the `<appSettings>` element, add a line with your encrypted password according to the following example.

Example

```
<appSettings>
<add key="EncrPwd" value="The_encrypted_Password"/>
</appSettings>
```

10. Save and close the file.

Specify the Maximum Document File Size

The maximum file size which can be uploaded is 256MB. To specify a smaller maximum file size complete the following steps.

1. From the **[Installation path]\BrainwareApiServer** directory, open **Web.config** in a text editor.
2. Search for the following line.

```
<add key="MaxFileUploadLimit" value="262144" />
```

3. Set the `value` parameter to the required value in KB.

Enable Method Logging

To enable method logging, complete the following steps.

Note: Enable method logging for debugging purposes only, as this may affect performance.

1. From the *[Installation path]\BrainwareApiServer* directory, open **Web.config** in a text editor.
2. Search for the following line.

```
<add key="EnableMethodLog" value="false" />
```
3. Set the `value` parameter to `true`.
4. In the *[Installation path]\BrainwareApiServer* directory, review the **trace.log** file.

Specify the Token Expiry Time

To specify the token expiry time, complete the following steps.

1. From the *[Installation path]\BrainwareApiServer* directory, open **Web.config** in a text editor.
2. Search for the following line.

```
<add key="TokenExpireTime" value="60" />
```
3. Set the `value` parameter to the required value in minutes.

Specify the Batch List Limit

To specify the maximum number of batches returned by the `GET ExternalBatch` method, complete the following steps.

Note:

The `GET ExternalBatch` method uses the `BatchListLimit` value as default if the optional `limit` parameter is not specified before executing the method.

1. From the *[Installation path]\BrainwareApiServer* directory, open **Web.config** in a text editor.
2. Search for the following line.

```
<add key="BatchListLimit" value="1000" />
```
3. Set the `value` parameter to the required number.

Configure IIS

The Brainware API installer performs the initial IIS configuration. To verify or modify this configuration, complete the following steps.

1. In IIS, under **Default Web Site**, select **BrainwareAPI**.
2. In the left pane, right-click **BrainwareAPI** and then click **Edit Permissions**.
3. In the **Properties** dialog box, on the **Security** tab, review the permissions and then click **OK**.
4. In the middle pane, double-click **Authentication**.

5. In the **Authentication** pane, verify that **Windows Authentication** is enabled.
6. Right-click **Windows Authentication** and then click **Providers**.
7. In the **Providers** dialog box, verify or add the required providers.
8. In the left pane, click **Application Pools**.
9. In the middle pane, right-click **BrainwareAPIAppPool** and then click **Advanced Settings**.
10. In the **Advanced Settings** dialog box, verify the following settings and then click **OK**.
 - **Identity** = **ApplicationPoolIdentity**.

Note:

The chosen identity needs permissions to access and read files from the *[Installation path]\BrainwareApiServer* directory and its subdirectories.

- **Enable 32-bit Applications** = **True**.
11. Navigate to the **%WINDIR%\System32\inetsrv** directory and then complete the following substeps.
 1. Right-click the **config** directory and then click **Properties**.
 2. In the **config Properties** dialog box, on the **Security** tab, click **Edit**.
 3. In the **Permissions for config** dialog box, to add a new user, click **Add**.
 4. In the **Select Users or Groups** dialog box, click **Locations**.
 5. In the **Locations** dialog box, select the computer where Web Verifier is installed, and then click **OK**.
 6. In the **Select Users or Groups** dialog box, in the **Enter the object names to select** field, type `IIS_IUSRS` and then click **OK**.
 7. In the **Permissions for config** dialog box, verify that the user has the following permissions and then click **Apply**.
 - Read & execute
 - List folder contents
 - Read
 8. If an error message is displayed, click **Continue**.

Configure Server Security for Brainware API

To configure the server security, complete the following tasks.

1. [Add the User Context in SQL Server](#)
2. [Verify the IIS Identity](#)
3. [Set Permissions for BAPI Installation Directory](#)

Add the User Context in SQL Server

To use the Brainware API (BAPI), your users need access rights for the SQL Server database with the BAPI user context. The default user context is Network Service. You can change the default user context to a service account.

Note: If you log in to SQL Server using Windows authentication, you need to add the domain username to the SQL Server database in addition to the NT Authority/Network Service.

To add the user context to SQL Server, complete the following steps.

1. In **Microsoft SQL Server Management Studio**, in the left pane, click **Security > Logins**.
2. Right-click **Logins** and then click **New Login**.
3. In the **Login** dialog box, click **Search**.
4. In the **Select User or Group** dialog box, in the **Enter the object name to select** field, type either `IIS AppPool\BrainwareAPIAppPool` or the name of the user context, click **Check Names** and then click **OK**.
5. In the **Login Properties** dialog box, in the left pane, click **User Mapping**.
6. In the upper right pane, in the **Map** column, select the check box for the required database.
7. In the lower right pane, select the following database roles and then click **OK**.
 - db_datareader
 - db_datawriter
 - db_runner

Verify the IIS Identity

To verify that IIS run under the appropriate identity, complete the following steps.

1. In **Internet Information Services (IIS) Manager**, in the **Connections** pane, open the server node and then click **Application Pools**.
2. In the **Application Pools** pane, right-click **BrainwareAPIAppPool** and then click **Advanced Settings**.
3. In the **Advanced Settings** dialog box, under **Process Model**, verify that the **Identity** property has the value `ApplicationPoolIdentity` or the name of the service account.

Set Permissions for BAPI Installation Directory

The Brainware API application pool or the service account, if used, needs access to its installation directory.

1. In **Windows Explorer**, right-click the *[BAPI Installation path]* directory and then click **Properties**.
2. In the **Properties** dialog box, on the **Security** tab, click **Edit**.
3. In the **Permissions** dialog box, click **Add**.
4. In the **Select Users, Computers, Service Accounts, or Groups** dialog box, in the **Enter the object names to select** field, type either `IIS AppPool\BrainwareApiAppPool` or the name of the user context, click **Check Names** and then click **OK**.

Configure Component Logging

To configure the location of the component log files, complete one of the following steps.

- To save component log files to the default location, in the `C:\Windows\SysWOW64\inetsrv` directory, create a directory named *Log*.
- To save component log files to a custom location, see "Create the registry key ErrorTraceDir " in the *Brainware Intelligent Capture Installation Guide*.

Note:

If BIC is installed on the same server, this registry key will also direct all BIC component log files to this custom location.

About BrainwareApi.CommandLine.Client

BrainwareApi.CommandLine.Client is an example application which uses Brainware API to upload sets of documents as external batches. Both the source code and compiled application are provided.

For more information, see "Readme.txt" in the `[InstallationPath]\BrainwareAPI\Brainware.CommandLine.Client` directory.

Display the API Documentation

The Brainware API installation creates a shortcut to the documentation. To display the documentation, complete the following step.

- In the `[Installation path]\BrainwareAPI` directory, double-click **BrainwareAPI_Documentation**. The Brainware API documentation displays in your browser.

Note:

For testing purposes, the documentation provides a Try it out! button for each method.

Update Brainware API

The Brainware API installer does not provide an update procedure. If you need to update to a newer version, complete the following steps to retain your unique customizations and back up your settings.

1. Copy the `[Installation path]\BrainwareAPI` directory to a backup directory.
2. If you modified the settings for the BrainwareAPI application in IIS, note your settings.
3. Complete the steps in [Install Brainware Intelligent Capture API](#).
4. Compare all customized settings in the backed up CONFIG files with the CONFIG files in `[Installation path]\BrainwareAPI` and modify the values if required.
5. In IIS, compare the settings for the BrainwareAPI application with your previous settings and modify the settings if required.