

User Portal Installation Guide

USER PORTAL INSTALLATION GUIDE

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PREFACE

This book is part of a comprehensive set of documentation and Help materials for Navision Attain[®].

The manual describes User Portal, which allows you to access and update Navision Attain from a Web browser via an intranet, extranet or the Internet.

The manual describes how to install and administer User Portal. However, we recommend that the installation and customization process is carried out with the assistance of a Navision Solution Center representative.

You should also be familiar with the symbols and typographical conventions used in the Navision manuals. In the list below, you can see how various elements of the program are distinguished by special typefaces and symbols:

| Appearance | Element |
|--------------------------|---|
| CTRL | Keys on the keyboard. They are written in small capitals. |
| Address | Field names. They appear in medium bold and start with a capital letter. |
| <i>Department</i> | Names of windows, boxes and tabs. They appear in medium bold italics and start with a capital letter. |
| <i>Hansen</i> | Text that you must enter, for example: "...enter Yes in this field." It is written in italics. |
| <code>fin.flf</code> | File names. They are written with the Courier font and lowercase letters. |
| ↑ ↓ ▼ *► ... | The special symbols that can be seen in the windows on the screen. |

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Chapter 1

User Portal Installation

This chapter describes User Portal and how you install it. It also describes how to set up and maintain User Portal.

This chapter contains the following sections:

- Introduction to User Portal
- Installing User Portal
- Setting Up User Portal
- Maintaining User Portal Application Server

1.1 INTRODUCTION TO USER PORTAL

User Portal is a middle-tier server, which allows you to access and update data in Navision Attain® from a Web browser via an intranet, extranet or through limited Internet access. This is done via a portal that can be customized to meet the requirements and demands of individual users or types of users.

A User Portal solution allows your sales representatives, for example, to extract and update the data contained in Navision Attain from their laptop computer when they are in the field. All they need is an Internet connection.

With a User Portal, your employees can have access to all the information they need to fulfill the roles they have in your organization. They can initiate searches for relevant role-based information from any source. For example, when a sales representative needs information on customer accounts and sales history, they can easily access the most up-to-date information in Sales & Receivables from their User Portal.

A User Portal allows users to tailor their personal home pages to fit their needs.

1.2 INSTALLING USER PORTAL

Windows Installer packages are provided for all of the components that you need to install. You use these to install, maintain and remove User Portal Application Server and User Portal.

Preconditions

There are certain requirements that must be fulfilled before you install User Portal. Exactly which components are installed on which server computers depends on what User Portal is used for: an intranet or the Internet.

The procedures described in this manual are based on installing a User Portal intranet solution. In this case, User Portal Application Server, User Portal and Microsoft Digital Dashboard should be installed on the Internet Information Server that generates your intranet.

Windows 2000 Server You must install Microsoft Windows 2000 Server on your server computer and ensure that the following component is also installed:

- Internet Information Services (IIS) – the standard subcomponents are sufficient.

For more information about installing Windows 2000 Server and the system requirements, see Microsoft's documentation.

Printer You must install at least one printer on the User Portal Application Server computer. This will ensure that reports are displayed correctly.

Upgrade your Application If you are not already using Navision Attain 3.10, you must upgrade to this version. For more information about upgrading Navision Attain, see the Upgrade Toolkit on the Navision Attain product CD and consult your local Navision Solution Center.

Overview of the Installation Process

The components needed by User Portal must be installed on your server computer in the order shown in the following table.

Note that some of the individual steps in the overview are explained in further detail elsewhere in this or other manuals.

| | Task | Additional Information |
|---|--|---|
| 1 | Install a Navision Attain client. When you start this client with the <i>runasupas</i> parameter, C/SIDE converts the client into User Portal Application Server. | For more information, see the section called "Installing User Portal Application Server". |
| 2 | Import your license file into User Portal Application Server. | You can import it from the user interface or you can copy your <i>fin.flf</i> license file to the Navision Attain, Client folder and then open User Portal Application Server. |
| 3 | Install the server that you are going to connect User Portal Application Server to – Navision Attain Database Server or Microsoft SQL Server. | You must install the server in custom mode so that you can select the license file and database that you want to use. Both installation programs are supplied on the Navision Attain product CD. |
| 4 | Verify that User Portal Application Server can access the database server that you just installed. | |
| 5 | Install C/FRONT 3.10. | For more information, see the <i>readme.txt</i> file in the Cfront folder on the Navision Attain product CD. |
| 6 | In Windows Explorer, copy your license file to the folder where C/FRONT is installed. | You cannot install User Portal unless you install C/FRONT 3.10. |
| 7 | Test C/FRONT by running <i>sample.exe</i> from the Cfront folder on the Navision Attain product CD. | |
| 8 | Install Microsoft Digital Dashboard. | You cannot install User Portal unless you install Microsoft Digital Dashboard. For more information, see the section called "Installing Microsoft Digital Dashboard". |
| 9 | Install User Portal. | For more information, see the section called "Installing User Portal". |

Installing User Portal Application Server

User Portal Application Server is installed as a Navision Attain client on your middle-tier server or the server running Internet Information Services. To install User Portal Application Server, you must install the normal Navision Attain client on the server and start it with the *runasupas* program property.

Installing Navision
Attain Client

Navision Attain comes with a standard Windows Installer package that will guide you through the installation.

When you start the installation program, Windows Installer checks whether or not a Navision Attain client is already installed on the computer. If you already have a version installed, you will be prompted by the **Program Maintenance** window. For more information about maintaining the program, see page 11.

If a Navision Attain client is not already installed, the installation program starts and will guide you through the installation process.

Setting Program Properties

To convert the standard client into User Portal Application Server, you must set a program property as described in the following procedure:

- 1 In Windows Explorer, go to the Navision Attain, Client folder.
- 2 Select the file that corresponds to your database server.

If your database server is Navision Attain Database Server, right-click the `fin.exe` file and select *Create Shortcut*.

If your database server is Microsoft SQL Server, right-click the `finsql.exe` file and select *Create Shortcut*.
- 3 Select the shortcut that you just created and copy it to the folder Documents and Settings, All Users, Start Menu, Programs, Navision Attain.
- 4 Delete the two existing shortcuts in that folder.
- 5 Select the new shortcut, right-click it and select *Properties*.
- 6 In the **Properties** window, on the **Shortcut** tab, in the **Target** field, enter the following program property at the end of the text in that field: *runasupas*.

The following program properties are most frequently used for User Portal Application Server:

| Program Property | Value | Comment |
|-------------------|-----------------|--|
| runasupas | | This program property is mandatory in order to convert the client into User Portal Application Server. |
| servername= | Name of server | |
| company= | Name of company | For example CRONUS International Ltd. |
| NTAuthentication= | Yes | User Portal Application Server does not accept database logins |

For more information about setting program properties, see Chapter 2 in the manual *Installation & System Management: Navision Attain Database Server* or the manual *Installation & System Management: Microsoft SQL Server Option*.

- 7 Click OK.

The next time you open this particular client, it will operate as User Portal Application Server on that server computer. At the same time, you have made it easier to identify this client as User Portal Application Server by cleaning up the icons in your Start Menu.

Installing Microsoft Digital Dashboard

You must install Microsoft Digital Dashboard 2.01 on your server computer. This program can be found on the Navision Attain product CD. Installing Digital Dashboard places a shortcut to a Digital Dashboard HTML page on your desktop. You use this Web page to install the remaining components that you need.

To install these components:

- 1 Open the Digital Dashboard HTML page and, in the main menu on the left-hand side of the page, click *Building Dashboards*.
- 2 Click *Install the Windows 2000 File System Sample Digital Dashboard*. This will install the digital dashboard file system. You must accept the default settings for all the options.

This will also set up Internet Information Services.

For more information about using Digital Dashboard 2.01, see the Digital Dashboard Resource Kit. This is located in the Uptools folder on the Navision Attain product CD.

Installing User Portal

After you have installed User Portal Application Server, you must install User Portal on your server computer.

The User Portal Installer package is located on the Navision Attain product CD. The installation program will guide you through the installation process.

When the installation is complete, you will have placed a number of Web parts on your server. These Web parts are used by Digital Dashboard to create your User Portal solutions.

For more information about Web parts, see the training manual *User Portal Developer's Guide*.

1.3 SETTING UP USER PORTAL

After you have installed User Portal, you must setup some definitions in the `dashboard_const.inc` file on the server computer.

Defining the Constants

The `dashboard_const.inc` file is normally located at `C:\inetpub\WWWroot\Factory`. You must set up this file in the following way:

- `Const stPortalServer = "http://MyPortalServer"`
This is the address of your Internet Information Server. You must replace this with the name of your Web site. This address cannot contain any spaces.
- `Const stPortalVRoot = "Dashboards"`
This is the folder where definitions of the dashboards are installed. If you changed the name while you were installing Digital Dashboard, you must enter the new name here. We recommend that you do not change the name.
- `Const stDashVRoot = "Dashboards/Forms/Welcome/"`
This is where the standard welcome page is stored. This page is shown to the user who has not been assigned any activity centers or Web parts when they log on to the User Portal.
- `Const stPortalURL = "www.navisision.com"`
This is the text that appears in the User Portal as a link to your corporate home page. You must replace this with the name of your corporate home page.
- `Const stPortalLogoAlt = "User Portal"`
This is the text that appears as a ToolTip when you move your mouse over the links to your corporate home page. You can replace this with the text of your choice.
- `Const stPortalLogoUrl = "http://www.navisision.com"`
This is the URL of your corporate home page. You must replace this with the URL of your corporate home page.
- `Const stPortalLogoSrc = "Cronus_Logo.gif"`
This is the name of the graphic file that is used to display your corporate logo. This file must be stored in the Factory folder and must have the same name both there and here in the `dashboard_const.inc` file. This file is also a link to your corporate home page. This file must be 181x56 pixels.
- `Const stDigitalDashBoardRootDir = "c:\inetpub\wwwroot\"`
This is the home directory of your Web server files.
- `Const stDebugDir = "c:\tmp"`
This is the location of your debug folder. The folder will be created when you run debug mode. For more information, see the training manual *User Portal Developer's Guide*.

- `Const stMRUMaxSize = 5`

This is the maximum number of links that are allowed in the Recently Visited list.

For more information about the Recently Visited list, see the training manual *User Portal Developer's Guide*.

- `Const stHandshakeTimeoutInSeconds = 10`

This is the number of seconds that the system will wait for a server to be available after the client computer sends a request to User Portal Application Server. When a server is found and the request has been sent, the browser will wait until a response is received. If no server is available, a message is displayed informing you of this. You should try again later. The default value is 10.

- `Const stSessionCacheTimeoutInSeconds = 3600`

This constant determines whether or not you can use session caching and how long the data is stored in the cache. The value entered determines the number of seconds that the data stored in the cache is valid. If this is set to 0, caching is disabled. The default value is 3600 (one hour).

Session caching is used to store intermediate data on the server and thereby improve performance. The information stored includes which forms and activity centers the user has access to.

The cache is cleared every time you open a new instance of the browser.

Note

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Ctrl+N does not open a new instance of the browser. It copies the current instance.
.....

- `Const stCacheFormDashboards = 1`

This constant determines whether or not the definitions of the dashboards that contain forms are stored in the cache. As a rule, these dashboards are not changed and can therefore be cached. Enter 0 if you do not want to store them in the cache and enter 1 if you want to store them in the cache. The default value is 1.

- `Const stCacheUserDashboards = 0`

This constant determines whether or not the definitions of the dashboards that contain the user's activity centers are stored in the cache. These activity centers can be personalized and as a result can be changed often. Therefore, we recommend that you do not store this information in the cache. Enter 0 if you do not want to store the definitions in the cache and enter 1 if you want to store them in the cache. The default value is 0.

- `Const stAdminCanRemoveWebParts = 0`

This constant determines whether or not any changes that administrators make from within Navision Attain, such as removing or assigning Web parts and activity centers, take immediate effect in User Portal. Enter 0 if you do not want them to be able to remove Web parts and enter 1 if you want them to be able to remove Web parts. The default value is 0.

Note that the user must open a new instance of the browser for changes to take effect if you set the value to 1.

For more information about removing Web parts and activity centers, see page 23.

- `Const stAutoValidateFields = 1`

This constant determines whether or not you want User Portal Application Server to validate the content of the field immediately after any information is entered into a field. Enter *1* if you want to validate the fields automatically and enter *0* if you do not want to validate the fields automatically. The default value is *1*.

This validation process causes more traffic on the network and this can have a negative affect on performance if you have a slow connection. If this is the case, we recommend disabling this feature.

- `Const stPipeName = "\\.\\Pipe/UserPortalPipe"`

This constant determines the name of the Named Pipe that you are using for communication between the browser computer and User Portal Application Server.

Transferring Pictures

The following constants are only used if you want to transfer pictures to your users' User Portal browsers. If you do not want the clients to see pictures, you can ignore these constants:

- `Const stSQLServer = 0`

This constant specifies which server you are running Navision Attain on. Enter *0* if you are running on Navision Attain Database Server and enter *1* if you are running on SQL Server. The default value is *0*.

- `Const stDatabaseServerName = "My Server"`

This is the name of your database server. The name of your server is entered automatically during the installation. You can change it if your server is in a different location.

- `Const stNetType = "tcp"`

This constant specifies which network protocol is used to communicate with the server. Enter *tcp* if you are using TCP/IP and enter *netb* if you are using NetBios. The default value is *tcp*.

Note that this constant is redundant if the database server and User Portal are installed on the same server computer.

- `Const stDatabaseName = ""`

If you are running Navision Attain on SQL Server, you must enter the name of the database that you are using.

The Client Computers

In order to access a Navision Attain User Portal from a client computer, you must ensure that one of the following operating systems is installed on the client computer: Windows XP, Windows 2000, Windows NT 4 (Service Pack 6) or Windows 98.

The client computers must also have Microsoft Internet Explorer 5.0 or later installed.

1.4 MAINTAINING USER PORTAL APPLICATION SERVER

You can also use Windows Installer to repair and remove User Portal Application Server. To do this, follow this procedure:

- 1 Open the Control Panel and double-click the Add/Remove Programs icon.
- 2 Select *Navision Attain 3.10*. This is the same as User Portal Application Server, in this case.
- 3 Click Change and the Installation Wizard opens.

Repairing the Installation

If you select *Repair*, the **Custom Setup** window appears. Select *Navision Attain 3.10* and click Next. The **Ready to Repair the Program** window appears. The repair option will fix any missing files, corrupt files, shortcuts, and registry entries. Windows Installer will protect any license files, database backups and will, therefore, not overwrite these files if you have to repair the installation. When the application server has been repaired, the **Installation Complete** window appears, informing you that the installation has been repaired successfully.

Removing the Installation

If you select *Remove*, a window appears prompting you to confirm that you want to uninstall the product.

If you start to uninstall User Portal Application Server, you can still cancel the uninstallation at any time. If you do so, Windows Installer returns the computer to the state it was in before the uninstallation process began.

When you remove the server, everything will be removed except any license files (*.flf with the exception of `cronus.flf`), database files (*.fdb) and database backup files (*.fbk) that are stored locally. If you want to remove these files, you must do it manually.

When the process is finished, an **Uninstallation Complete** window appears informing you whether or not Navision Attain, that is User Portal Application Server, has been successfully removed.

Attention

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We recommend that you make a backup of any license files, databases and database backups that are stored locally before repairing or removing the server installation.
.....

Upgrading to a New Version

If you want to upgrade your User Portal Application Server, you must uninstall the old version before you can install the new version.

However, in order to ensure that the new *.dll files are registered correctly when you install the new version, you must carry out the following steps:

- 1 Open the **Microsoft Management Console** for Windows 2000 Server. Open the Services folder and scroll to the World Wide Web Publishing Service. Stop the World Wide Web Publishing Service.
- 2 Uninstall the old version of User Portal Application Server.
- 3 Open the **Microsoft Management Console** for the Windows 2000 Server. Open the Services folder and scroll to the World Wide Web Publishing Service. Start the World Wide Web Publishing Service again.
- 4 Install the new Navision Attain client and set it up as User Portal Application Server as described on page 4.

The *.dll files will now be registered correctly.

You can also choose to install a plug-in for the Microsoft Management Console that has a menu item that allows you to stop and start the World Wide Web Publishing Service.

Chapter 2

User Portal Setup

This chapter describes how to set up your User Portal solution. It describes how to create users and give them access to activity centers and Web parts. It also describes how to define the default user.

The chapter contains the following sections:

- Administering User Portal
- Adding Tasks and Links
- Security Settings and Permissions

2.1 ADMINISTERING USER PORTAL

After you have installed User Portal Application Server and User Portal, you can begin to set up your User Portal solution and the users that will have access to it. You can find the windows that will help you set up User Portal in the General Ledger setup menu.

Setting up User Portal involves setting up the users and specifying the activity centers and Web parts that they are going to use. You can design your own activity centers by specifying which Web parts should be included. You can also specify which links will appear in the Frequent Tasks lists of the different users when they access User Portal.

Note that the user must be given the appropriate permissions to the relevant database objects before they can perform any tasks via User Portal.

Setting Up the Users

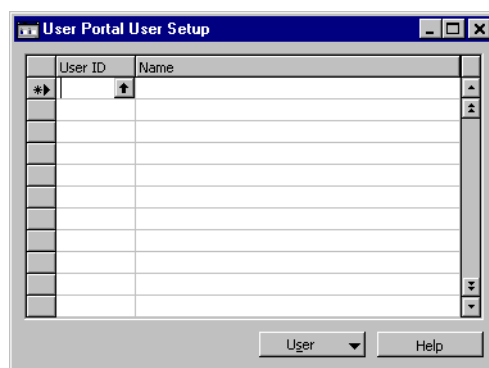
Before any users can access your User Portal solution, you must create them as Windows logins on the server and add them to the User Portal setup. Then you must specify the activity centers and the Web parts that they can use.


User Portal Application Server only supports Windows logins. For more information about creating Windows logins and assigning roles, see the manual *Installation & System Management: Navision Attain Database Server* or *Installation & System Management: Microsoft SQL Server Option*.

Adding a User

To add a user to the user portal setup, follow this procedure:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, User Setup. The **User Portal User Setup** window appears:



- 2 In the **User Portal User Setup** window, you can add a user if you know their user ID. If you do not know their user ID, click the AssistButton  in the **User ID** field and select the appropriate user ID from the **Logins** window that appears.

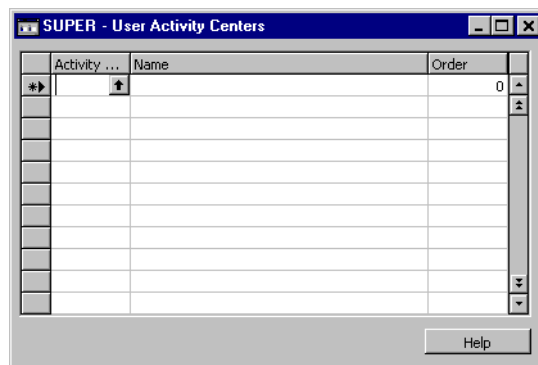
The **Logins** window contains the user IDs of all the logins that have been created in the current database; the **Logins** window contains both the database logins and the

Windows logins. However, if you have created a login for a Windows group, the **Logins** window will only display the name of the group and not the names of the individual members of the group. For more information about security in User Portal Application Server, see page 24.

Assigning the Activity Centers

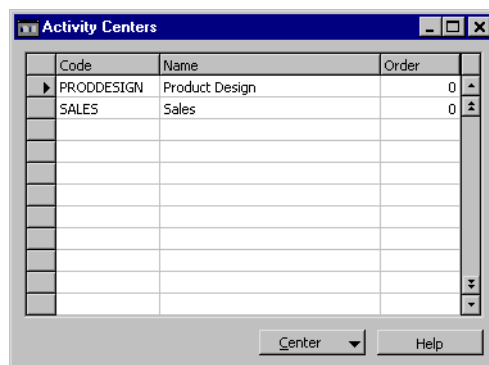
To specify which activity centers are assigned to a user, follow this procedure:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, User Setup. The **User Portal User Setup** window appears.
- 2 Select the user that you want and click User, Activity Centers. The **User Activity Centers** window for that user appears:



The **User Activity Centers** window lists the activity centers that have been assigned to this user. It should be empty now.

- 3 In the **Activity Center Code** field, click the AssistButton ↑ to assign an activity center to the user. The **Activity Centers** window appears:



- 4 Select the activity center that you want to assign to the user and click OK.

You have now assigned an activity center to a user.

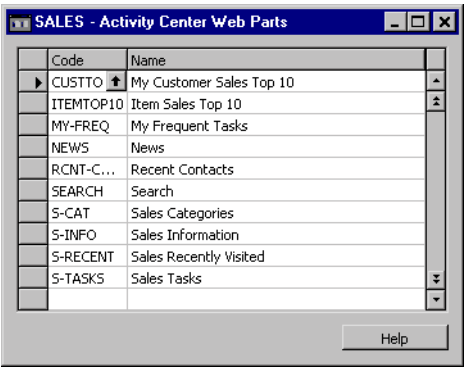
If you want to see the Web parts that this activity center has access to, select the activity center in the **Activity Centers** window and click Center, Web Parts. The **Activity Center Web Parts** window for this activity center appears, listing all the Web parts that have been assigned to this activity center.

Adding a Web Part to an Activity Center

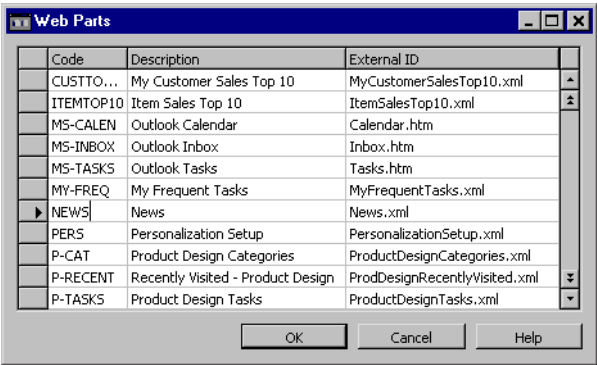
Each individual Web part consists of an *.htm, *.xml, *.js or *.vbs file that must be created outside Navision Attain. After you have created the Web parts, you can add them to an activity center. For more information about creating Web parts, see the manual *User Portal Developer's Guide*.

To add a Web part to an activity center:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, Activity Centers. The **Activity Centers** window appears.
- 2 Select the activity center to which you want to add a Web part and click Activity Center, Web Parts. The **Activity Center Web Parts** window for that activity center appears:



- 3 In the **Code** field, click the AssistButton ↑ and the **Web Parts** window appears:



- 4 Select the Web part that you want to add and click OK. This Web part will now be added to the activity center and will be displayed in the **Activity Center Web Parts** window for that activity center.

Note

.....
If you add a Web part to an activity center, it will also be available to all the other users that have been assigned that activity center. You should therefore consider creating new activity centers rather than changing the existing ones.
.....

Creating an Activity Center


You can create your own activity centers or redesign the predefined ones by adding or removing Web parts.

To create an activity center:

- 1 Open the General Ledger menu, click Setup, User Portal Setup, Activity Centers.

The **Activity Centers** window appears:



- 2 In the **Code** field, enter the code for the new activity center.
- 3 In the **Name** field, enter the name of the new activity center.
- 4 In the **Order** field, enter a number. This determines the order in which the activity centers are displayed in the global navigation area. The activity centers are displayed from left to right with the lowest number first.
- 5 Click Center, Web Parts. The **Activity Center Web Parts** window for this new activity center appears. It should be empty now.
- 6 In the **Code** field, click the AssistButton  and the **Web Parts** window appears.
- 7 In the **Web Parts** window, select the Web part that you want to add to the new activity center and click OK. The Web part will now be added to the **Activity Center Web Parts** window.
- 8 Repeat this process for each Web part that you want to add to the new activity center.

Setting Up User Portal

Now that you have set up the user IDs, created activity centers and added Web parts, you can set up your User Portal solution.

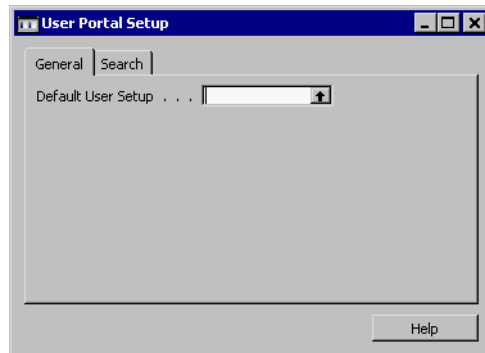
Setting Up the Default User

You must now specify which of the User Portal users will be the default user. The default user is the identity that will be given to anybody who accesses your User Portal solution but who is not set up as a user in User Portal. This means that these users will have access to the same activity centers and Web parts as the default user.

However, they will only be able to perform the same tasks as the default user, if they have been given the appropriate permissions to the database objects.

To specify the default user:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, Setup. The **User Portal Setup** window appears:



- 2 On the **General** tab, in the **Default User Setup** field, click the AssistButton ↑ and the **User Portal User Setup** window appears listing all the users that have been set up for this User Portal solution.
- 3 Select the user that you want to be the default user and click OK. This user's ID will now be shown in the **Default User Setup** field.

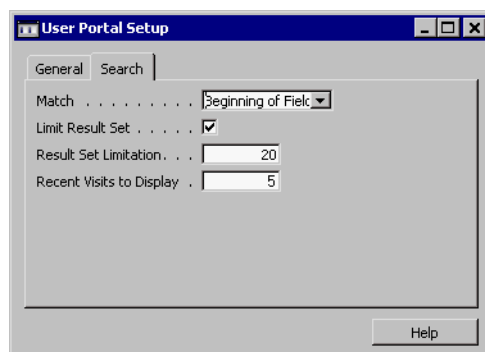
You have now defined the default user.

Searching in User Portal

You must also set up the way in which the clients can search for information in your User Portal solution.

To specify how a search is performed:

- 1 Open the **User Portal Setup** window as described on page 14.
- 2 Click the **Search** tab:



3 In the **Match** field, click the AssistButton ▼ and select one of the following options:

| Option | Means |
|--------------------|--|
| Whole Field | The search looks for a match between the keyword and all of a field. |
| Beginning of Field | The search looks for a match between the keyword and the beginning of a field. |
| Any Part of Field | The search looks for a match between the keyword and any part of a field. |

Note

.....
 Selecting the *Any Part of Field* option can have an adverse effect on performance.

4 In the **Limit Result Set** field, enter a check mark if you want each search to only give a limited number of results.

5 In the **Result Set Limitation** field, enter the maximum number of search results that you want to be shown on each page.

6 In the **Recent Visits to Display** field, enter the number of Web sites that you want to be displayed in the Recently Visited Web part.

2.2 ADDING TASKS AND LINKS

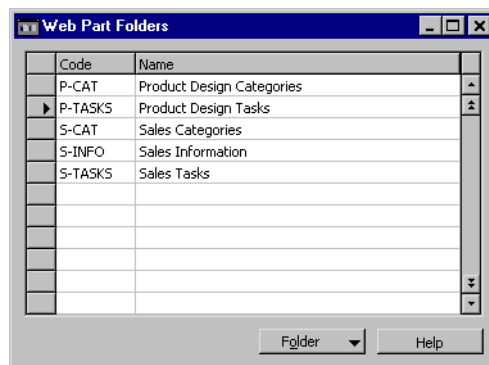
After you have set up the users, you can specify which tasks will be listed in the Web parts that comprise the activity centers that they can access. You can also determine which links will appear in their Frequent Tasks list.

Adding a Link to a Web Part Folder

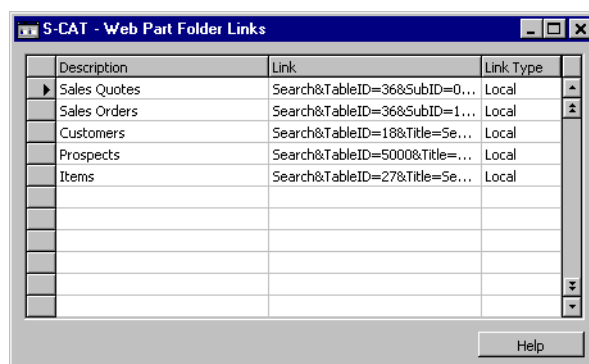
In User Portal, you can group links to tasks and documents in Web part folders. You can then create a Web part to display this group of links in your User Portal solution. for more information about creating Web parts, see the manual *User Portal Developer's Guide*.

To add a link to the tasks that are listed in a Web part folder:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, Web Part Folders. The **Web Part Folders** window appears:



- 2 Select the Web part folder to which you want to add a link.
- 3 Click Folder, Links. The **Web Parts Folder Links** window for that Web part folder appears:



- 4 In the **Description** field, enter the name that you want the link to have. Note that this is the text that will be displayed in the browser window.
- 5 In the **Link** field, enter the link.

- 6** In the **Link Type** field, use the AssistButton ▼ to select the type of link you are entering or enter the type of link manually.

There are three types of links to choose from:

| Type | Link Example | Meaning |
|--------|--------------------------|--|
| Normal | http://www.navision.com | a standard URL |
| E-Mail | jroberts@navision.com | an e-mail address |
| Local | Customer&View=CardCreate | a User Portal view which is based on functionality in Navision Attain. |

For more information about creating these tasks and naming local links, see the training manual *User Portal Developer's Guide*.

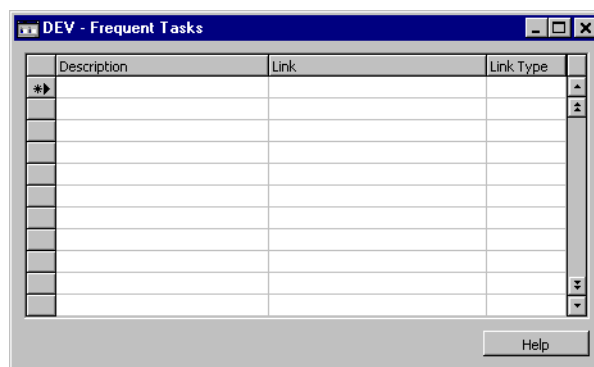
To remove a link from the list, simply select the line that the link is on and delete it.

Adding a Link to the Frequent Tasks List

You can also set up user-specific lists of frequent tasks, which means that each user can have access to different tasks and Web sites without having to alter the activity centers that they have been assigned.

To add a link to the Frequent Tasks list:

- 1 Open the General Ledger menu, and click Setup, User Portal Setup, User Setup. The **User Portal User Setup** window appears.
- 2 Select the user to whom you want to assign a frequent task and click User, Frequent Tasks. The **Frequent Tasks** window for that user appears:



- 3 You can enter the same kinds of links in the **Frequent Tasks** window as in the **Web Part Folder Links** window.

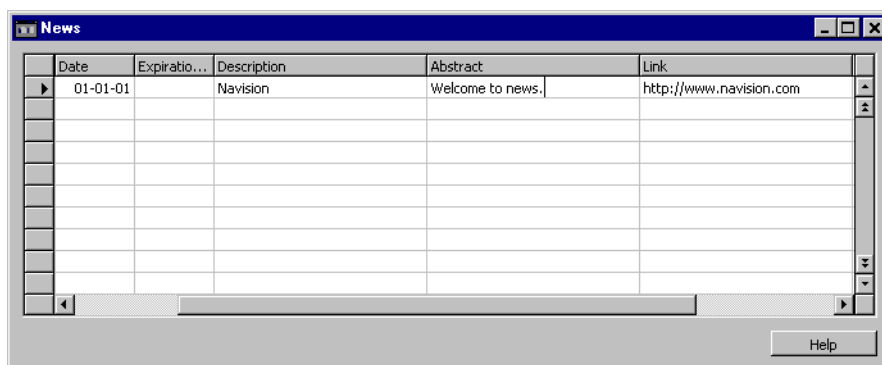
To remove a link from the list, simply select the line that the link is on and delete it. The user will be able to add tasks to this list from their User Portal.

Setting Up News

You can use the News Web part to display news to User Portal users, and you can add this Web part to any activity center. You can create a Web part that allows you to update your news from an activity center, or you can update the News Web part from the User Portal Application Server user interface.

To update the News Web part from the User Portal Application Server user interface, follow this procedure:

- 1 In User Portal Application Server, open the General Ledger menu, and click Setup, User Portal Setup, News. The **News** window appears:



- 2 Fill in the fields as follows:

| Field Name | Contents | Mandatory |
|------------------------|---|-----------|
| Category | Use this field to organize your news in categories of your choice. | |
| User ID | The program fills in this field automatically with the name of the user currently logged in. | ✓ |
| Date | The program fills in this field automatically with the working date. | ✓ |
| Time | The program fills in this field automatically when you create this piece of news. | ✓ |
| Expiration Date | Enter the date when you want this news to be deleted from User Portal. | |
| Description | Enter a brief description of your news. This description will be displayed as a heading in the News Web part. | ✓ |
| Abstract | Enter the first paragraph of your news in this field. | ✓ |
| Abstract 2 | If your news consists of more than one paragraph, enter the remaining paragraphs in this field. | |
| Link | If you want the users to be able to link from your heading in the Description field to a Web site, enter the URL of the Web site in this field. In the example shown in the picture above, the heading <i>Navision</i> is set up as a link to <i>http://www.navision.com</i> . | |

The next time users access an activity center containing the News Web part, they will see the updated news.

Removing Web Parts and Activity Centers

An administrator can also remove a Web part from an activity center and remove an activity center from a user who no longer needs to have access. This is done by opening the same windows that are used to add a Web part and assign an activity center and deleting the relevant the web part or activity center as described in the section "Setting Up User Portal".

These changes can be overruled by the user unless you change value of the `stAdminCanRemoveWebParts` constant in the `Dashboard_Const.inc` file. If you set the value to 1, any changes that the administrator makes will be reflected in the user's browser. If you leave the default value of 0, the deleted Web parts will have to be deleted manually from the browser interface. For more information about the `Dashboard_Const.inc` file, see page 7.

Important

The administrator can add or delete Web parts and activity centers at any time. However, the browser on the client computer must be restarted before the changes made by the administrator will take effect on the client computer.

2.3 SECURITY SETTINGS AND PERMISSIONS

After you have set up User Portal Application Server, you must ensure that the users have permission to access the user portal as well as the database objects that they need to do their work.

Security in User Portal Application Server

| | |
|----------------|---|
| | The security system in User Portal Application Server differs somewhat from a standard Navision Attain client. |
| Authentication | <p>User Portal Application Server only supports Windows authentication (NT authentication). You must therefore ensure that all of the users who are going to use user portal have been given a Windows login in the appropriate database.</p> <p>Furthermore, User Portal Application Server must be opened with Windows authentication. If you open User Portal Application Server using database authentication, the users who try to access the user portal from their browser will receive a message informing them that User Portal Application Server must be opened with Windows authentication.</p> |
| Permissions | <p>The users must not only be assigned the activity centers that they will use; they must also be given permission to access the relevant database objects. The user must also have permission to read the user portal objects.</p> <p>When the database administrator changes the permissions that have been given to a user, they will take effect within ten minutes. This is because the user's permissions are cached in User Portal Application Server and are reloaded every ten minutes.</p> |

Access to the Web Site

| | |
|-----------------------------|---|
| | As explained above, User Portal Application Server only supports Windows authentication. |
| Deny Anonymous Users Access | <p>To ensure that only authorized users gain access to the user portal you must prevent anonymous users from gaining access to the user portal Web site.</p> <p>To prevent anonymous users accessing the user portal Web site:</p> <ol style="list-style-type: none">1 On the server computer, click Programs, Administrative Tools, Computer Management. The Computer Management Console appears.2 Open Internet Information Services.3 Select Default Web Site, right click it and select <i>Properties</i>. The Properties window appears.4 Click the Directory Security tab and under <i>Anonymous access and authentication control</i>, click Edit. The Authentication Methods window appears. |

- 5 Remove the check mark from the **Anonymous access** field and ensure that there is a check mark in the **Integrated Windows authentication** field.
- 6 Click OK to apply these settings.
- 7 In the window that appears, accept the overrides.

You have now ensured that only authorized users can gain access to the user portal Web site.

Note

.....
 If you do not prevent anonymous users accessing the user portal Web site, no users will be authenticated and they will all gain access to the database as the user IUSER_ "Machine Name."

Sharing the Users Folder

To allow authenticated users to access the user portal, you must grant them permission to access the Users folder.

To grant users permission to access the Users folder:

- 1 In Windows Explorer, select the Users folder and click File, Properties.
- 2 In the **Users Properties** window, select the **Security** tab.
- 3 In the **Name** field, select *Everyone*.
- 4 In the **Permissions** pane, enter a check mark in the **Allow Full Control** field.

This grants the authenticated users access to the Users folder, all subfolders and files.

- 5 Click OK to set these permissions.

You have now installed User Portal and ensured that the client computers have access to it.

Note

.....
 User Portal Application Server must be running before you can connect to Navision Attain from User Portal.

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