Infor SyteLine Portals Setup and Administration Guide

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Contents

About this Guide

This guide describes how to set up and administer the SyteLine portals.

Intended Audience

The intended audience is a system administrator with knowledge of SyteLine and SharePoint.

Organization

This table describes the chapters of this guide:

Chapter	Content Includes...
System Requirements and Prerequisites	Portal requirements for SyteLine, SharePoint, and Portal Manager; browser information; and prerequisite knowledge.
Installing and Configuring the Portal(s)	SharePoint and SyteLine administration account setup, installing the portals and Portal Manager, installing and binding digital certificates, portal content activation, portal data source setup, and portal configuration.
Setting Up SyteLine for the Customer Portal	How to set up SyteLine to support Customer Portal activity. This includes setting up the site group, items and categories, consigned inventory, documents, interactions, customer records, your company contact information, currency codes, unit of measure codes, workflow event handlers and event triggers.
Setting Up SyteLine for Online Ordering	How to set up SyteLine to support online ordering. This includes setting up shipping charges, item pricing, currencies, tax codes, country codes, and credit card processing.
Setting Up SyteLine for the Reseller Portal	How to set up SyteLine to support Reseller Portal activity. This includes setting up reseller account records, resellers' customer records, and SyteLine Service parameters.
Setting Up SyteLine for the Vendor Portal	How to set up SyteLine to support Vendor Portal activity. This includes setting up the site group, consigned inventory, item price requests, planned orders, documents, interactions, vendor records, unit of measure codes, and workflow event handlers.
Setting Up and Managing SyteLine User Accounts for the Portal(s)	How to add users accounts in SyteLine for portal users. Manual steps are provided as well as information about working with the User Account Management Utility.
Managing Portal Content	Importing, exporting, and transferring portal content.
Personalizing the Portal(s)	Personalizing the portals to use your own company logo, pictures, text, and preferred styles and menu options.

Chapter	Content Includes...
Administration Tasks	Adding or updating portal content in SharePoint, clearing the portal cache, and working with publications and subscribers.
Customer Portal Users and Pages Overview	Descriptions of the different types of Customer Portal users. Also, descriptions and pictures of Customer Portal pages after all setup is complete.
Reseller Portal Pages Overview	Descriptions and pictures of Reseller Portal pages after all setup is complete.
Vendor Portal Pages Overview	Descriptions and pictures of Vendor Portal pages after all setup is complete.
Using Portal Diagnostics	How to use portal diagnostic services and the Diagnostic Viewer.
Troubleshooting	What to do if you experience certain issues with the portals.
Portals: Behind the Scenes	How the parts of the portal interact with SyteLine.
Customer Portal Page Architecture and Mapping to SyteLine	Where information shown in the Customer Portal comes from in SyteLine.
Reseller Portal Page Architecture and Mapping to SyteLine	Where information shown in the Reseller Portal comes from in SyteLine.
Vendor Portal Page Architecture and Mapping to SyteLine	Where information shown in the Vendor Portal comes from in SyteLine.
Uninstalling the Portal(s)	Steps for uninstalling the portal(s).

Related Documents

You can find the following related documents in the product documentation section of the Infor Xtreme Support portal, as described in “Contacting Infor” on page 14.

- *Infor Portals Customization Guide*
- *Infor SyteLine Multi-Site Planning Guide*
- *Infor SyteLine Multi-Site Implementation Guide*
- *Infor SyteLine Guide to Technology*
- *Infor SyteLine Licensing Guide*
- SyteLine Vendor Portal online help
- SyteLine Customer Portal online help
- SyteLine Reseller Portal online help

Contacting Infor

If you have questions about Infor products, log in to the Infor Xtreme Support portal at http://www.inforxtreme.com. If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation. If you have comments about Infor documentation, contact documentation@infor.com.

About the Portals

The SyteLine portals are separate products you can use with your SyteLine application. The portals run on Microsoft SharePoint 2010 and 2013 as Web sites that are publicly available to your customers, vendors, and resellers to provide browser-based access to relevant SyteLine data and functionality. Online ordering functionality also is provided. This section describes major features of the SyteLine 9.0 portals.

Terms to Know

Primary Site: In this document, primary site is referenced in two ways: Primary Site and PrimarySite (no space).

Primary Site is the SyteLine site where you set up and maintain data such as items, categories, and customer contracts.

PrimarySite is a data source that you will set up during data source configuration in Portal Manager and that points to your Primary Site in SyteLine. In a multi-site implementation, your master site must be used for the PrimarySite data source.

Portal Site Group: In this document, the portal site group is referenced in two ways: portal site group and PortalSiteGroup (no spaces).

Portal site group means the group of all sites in your implementation that will provide data for a portal. You may need to create a separate record for this site group on the SyteLine **Site Groups** form, and you will specify this as the **Site Group** on the SyteLine **Portal Parameters** form.

PortalSiteGroup is a multiplexed data source you will set up during data source configuration in Portal Manager and which points to the portal site group in SyteLine. The PortalSiteGroup data source must be identified as the Default data source during configuration. Even if you have a single-site implementation, you must configure the PortalSiteGroup to contain that site.

Licensing and Log In

You can license one, two, or all three portals. The login to the Customer, Vendor, and Reseller portals is used to authorize access to SyteLine, so only one user login is required. A portal-specific SyteLine license is required for each user who accesses the portals, including those Customer Portal users who register their own accounts or who are registered by their reseller. Portal users will receive an “Access Denied” error if you do not have enough licenses. You can check license usage counts on the SyteLine **License Management** form. Refer to the *Infor SyteLine Licensing Guide* for more information.

Data Restriction

Information shown on the portals is limited to the customer’s, vendor’s, or reseller’s own data where appropriate. For example, a customer who works for Company A cannot see Company B’s orders. This restriction is created during user account setup in SyteLine. See “Setting Up and Managing SyteLine User Accounts for the Portal(s)” on page 97.

Multi-Site Implementation

The SyteLine portals include multi-site functionality, so your portal pages can display and update data from multiple sites. You will specify portal site group data sources when configuring each portal, and the data sources must include all sites whose information should be exposed on that portal. You may need to create a Customer Portal and/or Vendor Portal site group on the SyteLine **Site Groups** form, if a site group containing all the necessary data sources does not already exist. Detailed information is provided in the setup chapters in this guide. You should also refer to the *SyteLine Multi-Site Planning Guide* and *SyteLine Multi-Site Implementation Guide* for general information about multi-site implementations.

Online Ordering

With online ordering functionality, customers can browse your product catalog, add items to an order, submit orders online, check order status, track shipments, and more. See Chapter 4, “Setting Up SyteLine for Online Ordering”.

Translation and Localization

The portals support translation and localization. Most of the text used on the portals is taken from SyteLine translatable strings. For more information, see “Internationalization” on page 190.

Installation

The portal installation package includes the Customer Portal, Vendor Portal, and Reseller Portal Web applications. The installation also includes portal diagnostics and the Portal Manager, where you configure and manage the portals. For step-by-step installation instructions, see Chapter 2, “Installing and Configuring the Portal(s)”.

Configuration and Diagnostics

Portal configuration tasks, including data source setup, pre-login and locale settings, content activation and management, and page set style selection, are all handled in the Portal Manager application. Also, portal diagnostics is accessed via Portal Manager. The Diagnostic Viewer allows you to see real-time trace log and event activity on selected servers, so you can troubleshoot issues more quickly and effectively. More information is provided in these sections:

- “Portal Manager” on page 18
- “Configuring the Portal(s)” on page 40
- “Managing Portal Content” on page 105
- “Using Portal Diagnostics” on page 165

Personalization and Customization

Some of the information on the portal pages must be personalized for your company; for example, logos, text, and images on the Home page and appropriate menu options. See Chapter 9, “Personalizing the Portal(s)”.

Many more customizations are also possible. For example, you can create new portal pages or modify existing pages by adding, removing, or rearranging Web Parts. Also, custom layouts and scripting can be added to the portals using the Portal Manager’s built-in Layout Editor. These customizations are described in the *Infor Portals Customization Guide.*

If you remove and reinstall the portals, you do not lose anything except your configuration information and any personalizations or customizations. You can back up customized files and overwrite or merge them with the base version. See “Exporting Modified Portal Content” on page 105.

Portal Manager

As described in the preceding sections, the Infor Portal Manager is used for a variety of tasks, some of which are for portal administration and some of which are for portal content development. Tasks that can be performed by both administrators and developers are described in this portal *Setup and Administration Guide*. Tasks that are for only developers are described in the *Infor Portals Customization Guide*.

The Portal Manager application is divided into four tabbed areas: Content Management, Content Development, Diagnostics, and Configuration. This table describes each functional area and for what, when, and by whom it is meant to be used:

Function	Used For	Used By/When	Documentation
Content Management	Exporting, importing, and transferring portal content. This is how content is backed up and reused.	Used by portal administrators and developers any time portal content is modified or created, whether for portal personalization or customization.	Setup and Administration Guide
Content Development	Modifying, creating, copying, locking, or deleting portal content. Content includes: ■ Field Display Formats ■ Layouts ■ Styles ■ Page Sets ■ Feature Dependencies ■ Collection Definitions ■ Components	Used by portal developers when customizations are needed.	Customization Guide
Diagnostics	Troubleshooting portal issues by collecting and reviewing diagnostic log data from the SharePoint server(s).	Used by portal administrators when diagnosing portal issues.	Setup and Administration Guide
Configuration	Configuring the portal(s) and applying various system settings.	Used by portal administrators after installing the portal and periodically for setup changes. Some features are also used by portal developers, such as enabling the portal for development and activating new features.	Setup and Administration Guide (Information about MSSQL and Oracle data source configuration is provided in the Customization Guide.)

System Requirements and Prerequisites 1

This chapter describes the installation prerequisites for the SyteLine portals. It does not include information about the number or configuration of SyteLine and/or SharePoint servers to use. For that information, see the *Infor SyteLine Guide to Technology*.

SyteLine

These are the portal prerequisites on the SyteLine side:

- SyteLine 9.00.00 or later must be installed and the IDO Web service must be installed.
- Download and install the complete list of SyteLine patches, which is provided in SyteLine Solution KB 1503413 found on the Infor Xtreme Support portal at http://www.inforxtreme.com.
- For Customer Portal to calculate expected ship dates for items ordered, SyteLine APS must be installed and active.
- For Customer Portal to allow credit card orders, the Credit Card Interface (CCI) add-on product must be installed along with CCI Gateway software.
- To use SyteLine Service portions of the Customer and Reseller portals, a SyteLineService license is required.
- Single-site SyteLine customers must purchase a SyteLinePortals license for each of their customer, vendor, and reseller users. Multi-site customers may also be required to purchase SyteLinePortals_MS licenses, depending on how SyteLine is configured. Refer to the *Infor SyteLine Licensing Guide* for more information.

SharePoint

These are the portal prerequisites on the SharePoint side:

NOTE: Contact your Microsoft provider for information about the licensing requirements for your Microsoft products.

- SharePoint Foundation 2010 SP2 or 2013 SP1 must be installed, and SharePoint must be installed in farm mode. Also download and install the most current hotfix.
- SharePoint must be able to access the SyteLine IDO Web service URL.
- A service account must be set up for the SharePoint Web application service(s). See “Set Up User Accounts for SharePoint” on page 25.

- We recommend that you use a secured connection (SSL/HTTPS) between the users' browsers and the server, at least for the external portal sites. In order to use SSL, you must obtain digital certificates that will be used for both of the portal Web applications (admin and external). These certificates will be installed into Internet Information Services (IIS). You must request these certificates from your internet service provider.

  You can use the same digital certificate for each IIS instance. However, if you are using certificates for both the external portals and the administration portal, those require different certificates. See "Determining the Public URL and Other Portal Settings" on page 30.

NOTE: Throughout this document, when we refer to SharePoint, we are referring to 2010 and 2013 versions unless specified otherwise.

Data Sources

SyteLine data sources for the portal are configured in Portal Manager, as described in "Configuring the Portal(s)" on page 40. Requirements for using Oracle and Microsoft SQL Server data sources are provided in the *Infor Portals Customization Guide*.

Portal Manager

Portal Manager can be installed and run with any 64-bit version of Windows 7 or later or Windows Server 2008R2 or later. It can be installed on a SharePoint Foundation server or a local machine.

To personalize display layout scripts from Portal Manager, you must have one of the following:

- Microsoft Visual Studio 2012
- Microsoft Visual Studio 2013
- Microsoft Visual Studio Express 2012 for Web
- Microsoft Visual Studio Express 2013 for Web

Visual Studio Express for Web can be downloaded free from the Microsoft Web site.

User Rights

The administrator who installs the portals and its prerequisites must be logged in to the Web server computer as a user with the following access rights:

- Administrator rights on the server: You must be a member of the Administrators group on the Web server where each portal is being installed.
- Administrator rights for Windows SharePoint Services: You must be the administrator of the site collection where each portal is being installed.

- Administrator rights for SQL Server: If you are using Windows Trusted Authentication for portal installation, you must have administrator rights to the SQL Server where SyteLine data is stored.

Browsers

The portals have been tested on these browsers and versions:

- Chrome
- Firefox
- Internet Explorer 9 and 10
- Safari for OS X

The portals may work, but are not supported, on other browsers and versions.

Prerequisite Knowledge

We assume that the person installing and administering the portals has the appropriate permissions and knows how to do these tasks:

- Perform some administrative tasks in a Microsoft SharePoint farm, such as creating and managing Web applications.
- Perform SyteLine system administration tasks such as adding users.
- Use IIS to administer digital certificates.

Installing and Configuring the Portal(s) 2

This chapter describes how to install and configure the portal(s). Information about using Microsoft SharePoint with the portals is included.

NOTE: Unless noted otherwise, the tasks in this chapter assume you are using a SharePoint Farm installation. See the note in “Set Up User Accounts for SharePoint” on page 25 for information about SharePoint Standalone installations.

Before You Start

Before completing the tasks in this chapter:

- Verify whether or not you have logins already set up for your external customers and/or vendors to an existing SharePoint site. If you do have existing customer and/or vendor logins to a SharePoint site, you may be able to reuse them. Contact Infor Consulting Services (ICS) for help with portal login setup.
- Be familiar with the languages and localizations that are set up in your SyteLine system, for example, which cultures and regions have translated text strings available in SyteLine. This determines which cultures and regions your portal can support. There is no relationship to the language packs set up in SharePoint. See “Internationalization” on page 190 for additional information about internationalization of the portal.
- Understand what a public URL is. The public URL is the domain name for all sites that users access in this SharePoint Web application. This URL domain is used in all links shown on pages within the Web application. The public URL can be the current servername and port for the Web application. In a production deployment, the URL is likely a publicly available domain name so that external customers, vendors, and/or resellers can use the name to access the portals. For more information, see “Determining the Public URL and Other Portal Settings” on page 30.

  To find out more about the use of public URLs, go to the Microsoft Technet Web site and search for **Plan alternate access mappings (Windows SharePoint)**.
- Know how to import and bind internet server certificates in Microsoft Internet Information Services (IIS) Manager. For information, see the IIS Manager online help.

- If you plan to set up the portal(s) in a test environment, make sure you have two available Web site ports for each portal you will install. One port number will be assigned to the administration site and one will be assigned to the Internet site for each installed portal. We highly recommend that you use a test environment.
- If this is not the first time you have installed the portal, and you want to have a “clean” installation — that is, nothing preserved from the previous installation — the portal must be completely uninstalled, as described in Appendix E, “Uninstalling the Portal(s)”.

Installation and Configuration Checklist

Use this checklist to keep track of the tasks required for portal installation and configuration:

	Task
☐	1. Check the Infor Xtreme Support portal for the most current version of this document: http://www.inforxtreme.com.
☐	2. Verify that you have the appropriate user rights and that you have set up all of the prerequisite software. See Chapter 1, “System Requirements and Prerequisites”.
☐	3. For SharePoint, add the necessary user accounts, install the application, and perform required setup. See “SharePoint Setup” on page 25.
☐	4. Set up the needed SyteLine user accounts. See “Setting Up Accounts for Portal Administration” on page 28.
☐	5. Install your first portal and the Portal Manager. See “Installing the Portal(s) and Portal Manager” on page 35.
☐	6. Bind digital certificates to the new Web applications, if applicable. See “Binding Digital Certificates to the Web Applications” on page 39.
☐	7. Configure the portal. See “Configuring the Portal(s)” on page 40.
☐	8. Repeat tasks 5 through 7 for each additional portal you need.
☐	9. Download and install any necessary portal patches, which are provided in SyteLine Solution KB 1459104 found on the Infor Xtreme Support portal at http://www.inforxtreme.com.

SharePoint Setup

These are the tasks involved in SharePoint setup:

1. Set up the necessary SharePoint user accounts
2. Install SharePoint
3. Create SharePoint account profiles on the portal server
4. Set the SharePoint managed account user
5. Configure service accounts
6. Install digital certificates in IIS on the SharePoint server

Set Up User Accounts for SharePoint

In Active Directory, you must set up separate domain accounts to install and run the services associated with SharePoint. The table on the next page shows the required accounts and their privilege requirements. Refer to Microsoft documentation for more information about Active Directory.

IMPORTANT: The accounts shown in the table are needed for a SharePoint Farm installation. If you plan to use a **SharePoint Standalone** installation for portal development, you do not need the separate domain accounts. Instead, you must make your administrator account a Managed Account in SharePoint, as described in "Make Portal Application Pool Account a Managed Account" on page 27, and then use that account throughout the development portal installation and configuration process. For example, you will:

- Use that account to log in to the machine to install the portal(s).
- Specify that account in the portal installation wizard when prompted for the Application Pool Logon Information.
- Use that account to log in to the Portal Manager for the first time.
- Use that account if you need to log in to the SharePoint server to Push to STS.

You should use Standalone mode only for portal development. Your production environment must use Farm mode.

Required Accounts for SharePoint Farm Installation

Account	Suggested Name	Purpose	Requirements
Setup User Account	SPInstall	This account is used for all administrative tasks, including but not limited to: ■ Run SharePoint installation. ■ Run SharePoint Products Configuration Wizard. ■ Server farm configuration and management from SharePoint Central Administration. ■ Run feature activation. ■ Log on to the server from a remote desktop, if applicable. ■ Install the SyteLine portals and Portal Manager.	■ Domain account. ■ Must be assigned a SQL Server login with these security roles: sysadmin or securityadmin and dbcreator. ■ Must be a member of the Administrators group of the local machine and on SharePoint, SQL, Reporting Service, and Analysis servers. ■ As part of the SharePoint Products Configuration Wizard, this user is automatically made a farm administrator in SharePoint Central Administration. By default, all local administrators on the SharePoint server are also farm administrators. ■ During the portal installation, this user is also granted Site Collection Administrator privileges for the site that is installed.
Server Farm Account	SPFarm	Used to: ■ Act as the application pool identity for the SharePoint Central Administration Web site. ■ Run Microsoft SharePoint Foundation Workflow Timer Service jobs under this user context.	■ Domain account. ■ This user is automatically assigned the appropriate permissions by the SharePoint Products Configuration Wizard.
SharePoint Services Account	SPServices	Used to: ■ Act as the application pool identity for the SyteLine portal Web site(s). ■ Log in to Portal Manager for the first time, to activate content and configure portals. ■ Run Web applications.	■ Domain account.

Install SharePoint

Using the appropriate user account — the administrator account for a Standalone installation or SPInstall for a Farm installation — install SharePoint. Refer to SharePoint documentation for installation instructions.

NOTE: If you install SharePoint on the SyteLine utility server, both applications will have a binding on port 80. To resolve this conflict, you must delete the default SharePoint Web application. Follow these steps:

1. Log in to the SharePoint server using the account you used for installing SharePoint.

2. In SharePoint Central Administration, select **Application Management > Manage web applications**.
3. In the list of Web applications, select **SharePoint - 80** and then click **Delete**.

Create Account Profiles

On the machine you will use to install the SyteLine portals, you must log in to the machine using each of the SharePoint user accounts at least once, so the account profiles can be created.

Make Portal Application Pool Account a Managed Account

For a SharePoint Farm installation, you must make SPServices a managed account user. This account should **not** be a machine administrator of the SharePoint machine.

For a SharePoint Standalone installation, you must make the SharePoint machine administrator a managed account user, as explained in the note before the table.

1. Log in to the SharePoint server using the account you used when you installed SharePoint.
2. In SharePoint Central Administration, select **Security > Configure managed accounts > Register Managed Account**.
3. Specify the service account credentials. For **User name**, use this format: *domain\SPServices*.
4. Click **OK**.

Configure Service Accounts

When you install SharePoint with local accounts, the Farm Account privileges might not be set to an account that has administration privileges. To verify and change this:

1. In SharePoint Central Administration, select **Security > Configure service accounts**.
2. Select **Farm Account** from the drop-down list.

If the Farm Account is not an account with administrator privileges, change it to an account with administrator privileges. This could require that you register a new managed account.

Install Digital Certificates in IIS

If you want the portal to use a secured connection (SSL) between the users' browsers and the server, you must import and configure digital certificates in Microsoft Internet Information Services (IIS) on the SharePoint server. These digital certificates were mentioned in Chapter 1, "System Requirements and Prerequisites".

In IIS Manager, on the Server Certificates page, make a note of the **Issue To** name associated with your server certificate. (This might be referred to as the **Common Name** during the process used to create the digital certificate.) You will need this name during the portal installation.

Setting Up Accounts for Portal Administration

This section describes setup of the user accounts needed in SyteLine for portal configuration, testing, and user account management.

Set Up the Configuration Accounts

Two SyteLine user accounts are needed to configure the portals. One is an account that briefly logs in to SyteLine to validate other user accounts when portal users log in. We recommend using the SL_Internal account for this purpose, so multiple simultaneous logins do not become a problem. The second is a pre-login account used to auto-log in to the portal, so our custom login page can be displayed for portal users. To set up these accounts, complete the following tasks:

Update the SL_Internal User Account

The SL_Internal account already exists in SyteLine. You must update its settings in one SyteLine site for a single-site implementation or in each of your SyteLine sites that will be used with the portal(s) in a multi-site implementation.

On the **Users** form in each site used by the portal(s):

1. Ensure that the SL_Internal user has a password. The password does not have to be the same in each site.

   You will provide this user ID and password when you configure SyteLine data sources in Portal Manager, as described in “Configure Data Sources” on page 42.

   NOTE: If for any reason the SyteLine database has to be re-licensed, the password for the SL_Internal user has to be reset in SyteLine.

2. Select **Super User**.

   You do not have to assign groups or user modules to the account.

3. Save the record.

Create the Pre-Login User Account

On the **Users** form in each site used by the portal(s):

1. Create a new user record; for example, IPF_Prelogin.
2. Specify a password. This password must be the same in all sites.

   You will provide this user ID and password when you configure general settings in Portal Manager, as described in “Set General Configuration Options” on page 45.

3. This account should *not* be set to Super User.
4. No groups should be assigned to this user.
5. Click **User Modules** and select the appropriate license module(s), either SyteLinePortals or SyteLinePortals_MS. Refer to the *Infor SyteLine Licensing Guide* for important details.
6. Save the record.

Set Up the Portal Administrator User Account

All of your customers, vendors, and resellers who will access your portals must be set up as portal users in SyteLine. The User Account Management Utility is provided to help streamline the process of portal user account creation. In order to work with the utility, you must first be set up as a portal administrator user in SyteLine. This user account must be created in each site used by the portal(s).

You can set up more than one portal administrator user, but only one administrator at a time should work with this utility.

To set up a portal administrator user in SyteLine:

1. On the **Users** form in each site used by the portal(s), create a new user account record.
2. Specify a user ID and password for this user.
3. This account should *not* be set to Super User.
4. Click **User Modules** and select the appropriate license module, either SyteLinePortals or SyteLinePortals_MS. Refer to the *Infor SyteLine Licensing Guide* for important details.
5. Click the Groups tab and select the **Admin Portal** group from the drop-down list.
6. Save the record.

Do not associate the portal administrator user account with any customer or vendor record in SyteLine.

When a portal administrator user logs in to any one of the portals, the User Account Management Utility page is automatically displayed. This is the only page the administrator can access in the portals. To access other pages, this user would need to have an additional user account set up in SyteLine for the applicable portal, just like any customer, vendor, or reseller user. This is described in the next topic.

Set Up the Testing User Account(s)

In order to test your portal(s) after installation and configuration, you need to have a user account set up in SyteLine for the applicable portal — Customer, Vendor, or Reseller — just like the accounts you will set up for your end users. This user account must be created in each site used by the portal(s). Account setup can be performed manually or using the User Account Management Utility page in each portal.

You can set up user accounts for testing now or after you have installed and configured the portals.

Refer to the instructions in Chapter 7, “Setting Up and Managing SyteLine User Accounts for the Portal(s)” for creating your testing user account(s).

Determining the Public URL and Other Portal Settings

This section provides information to help you determine settings needed when you run the portal installation wizard. Review this section *before* using the wizard. Step-by-step instructions for using the wizard are provided in “Run the Installation Wizard” on page 36.

When you run the portal installation wizard, you will need to specify public URLs to be used for accessing your portal(s). For each portal you install, two different sites are created: one for internal access and one for external (Internet) access. Generally the internal site is used for portal administration tasks, and the external site is used on the Internet by your customers, vendors, and/or resellers. However, external sites can also be used by administrators, so account configuration and permissions must be set up correctly.

This section describes two scenarios to help you determine how to format the public URLs: one scenario for an internal test environment and one for a production environment. The scenarios are for the installation of **one** portal. Spaces are provided for you to jot down the public URLs and other settings for your implementation, so you can refer to this information when you run the installation wizard. Print the following pages — one set for each portal you will install — to fill in your information.

NOTE: We recommend that you install portals in both a test environment and production environment, so you can experiment with settings and personalizations on the test sites and then transfer those modified features to the production portal.

Internal Test Environment for a Single-Server Farm

Use the following guidelines to complete the specified wizard screens if you are installing the portal(s) for an internal test environment on a single-server farm. Although this example is for an internal test environment, a site is created for external (Internet) access.

New Web Application Screen

The settings on this screen apply to the internal portal site (typically, the portal administration site).

Public URL: In the simplest scenario, administrators navigate their browsers directly to the server, therefore, the specified URL should look like this: `<SharePoint Server Name>`**.**

Your Public URL: ______________________________

Use Secure Sockets Layer (SSL): SSL protects you from certain kinds of sophisticated security attacks and generally is not necessary for internal portal sites. For the internal site, you can leave the check box cleared.

Your Setting: ______________________________

Web Application Advanced Information Screen

The settings on this screen also apply to the internal portal site.

Internal Host Header: For this scenario, again specify the SharePoint server name used in **Public URL** on the previous screen: `<SharePoint Server Name>`.

NOTE: If you chose to use SSL (digital certificates) for secure connections, this host header name must match the “Issued To” or “Common Name” on the digital certificate.

Your Internal Host Header: ____________________

Internal IIS Web Site Port: In this scenario, each Web application must be configured to use a separate port. Generally, you can allocate a range of “high” port numbers to use for your various portal Web applications. (Many port numbers that are less that 1024 are pre-allocated by convention and may cause problems if they are used in an unexpected way.) For example, you could use port 8080.

Your Internal IIS Web Site Port: ____________________

Use Port Number on Public URL: Select this check box. In this scenario, you will be using the SharePoint server name for the **Public URL** on both the administration site and the Internet site, so you have to use the port number on the public URL. Otherwise, both public URLs will be the same, and IIS will not know to which portal to route a user’s browser.

Your Setting: ____________________

Extended Web Application Screen

The settings on this screen apply to the external portal site (Internet), except for **Site Name**, which applies to both the administration and external sites.

Site Name: This is used as the name of the Web application when it is created in SharePoint. It is visible in SharePoint Central Administration, the IIS Manager, and in shortcuts created for opening the portal internal and external sites. For the administration site, the word “Administration” is automatically added to the name. You can use any descriptive name that helps you clarify the purpose of your various portals, and it must be unique from all existing Web application names. For example, if you install all three portals, your site names might be Customer Portal, Vendor Portal, and Reseller Portal. The administration site names then becomes Customer Portal Administration, Vendor Portal Administration, and Reseller Portal Administration.

Your Site Name: ____________________

Public URL: In this scenario, portal users will also navigate their browsers directly to the server, therefore, the specified URL should look like this: `<SharePoint Server Name>`.

Your Public URL: ____________________

Use Secure Sockets Layer (SSL): Typically, this option should be selected for the external portal site, unless you are not using SSL. However, because this scenario is for an internal test environment, it probably is not needed.

Your Setting: ____________________

Extended Web Application Advanced Information Screen

The settings on this screen also apply to the external portal site.

Internal Host Header: Specify the SharePoint server name used in **Public URL** on the previous screen: `<SharePoint Server Name>`.

NOTE: If you chose to use SSL (digital certificates) for secure connections, this host header name must match the “Issued To” or “Common Name” on the digital certificate.

Your Internal Host Header: ____________________

Internal IIS Web Site Port: In this scenario, each Web application must be configured to use a separate port. For the external portal site, you could use port 8081.

Your Internal IIS Web Site Port: ____________________

Use Port Number on Public URL: Select this check box.

Your Setting: ____________________

In this scenario, if you install all three portals, you would end up with these test Web applications:

Portal	URL	User	Login Method
Customer Portal	<SharePoint Server Name>:8080	Portal Administrators	Windows or forms authentication
	<SharePoint Server Name>:8081	(Test) Customers	Portal pre-login site page
Reseller Portal	<SharePoint Server Name>:8082	Portal Administrators	Windows or forms authentication
	<SharePoint Server Name>:8083	(Test) Resellers	Portal pre-login site page
Vendor Portal	<SharePoint Server Name>:8084	Portal Administrators	Windows or forms authentication
	<SharePoint Server Name>:8085	(Test) Vendors	Portal pre-login site page

External Production Environment for a Multi-Server Farm

Use the following guidelines to complete the specified wizard screens if you are installing the portal(s) for an external production environment on a multi-server farm.

NOTE: Implementation of a multi-server farm requires the use of a load balancer. There are many options to achieve load balancing. One option is the Network Load Balancing feature available as part of Windows Server. You can read more about it here: http://technet.microsoft.com/en-us/library/cc770558.aspx.

The Infor Portal Framework requires client affinity to a single cluster host. If you are using the Windows Network Load Balancing feature, the Affinity setting would therefore be “Single”. This is the default setting.

New Web Application Screen

The settings on this screen apply to the internal portal site (typically, the portal administration site).

Public URL: Administrators navigate their browsers to the farm. Because of load balancing, they may be serviced by any machine in that farm. Set up a DNS record for your administration site, such as CustPortalAdmin, as part of your internal DNS domain. It should point to the farm's load balancer. The specified public URL should then look like this: `CustPortalAdmin` or `CustPortalAdmin.<internal domain>`.

Generally, you don't expect administrators to access the administration site from outside the firewall. However, if you do want to support this case, the DNS record also must be set up in your external DNS. In this case, the public URL entry would look like this: `CustPortalAdmin.<yourcompany>.com`.

Your Public URL: ______________________________

Use Secure Sockets Layer (SSL): If you are making the administration site visible from the Internet and you are using SSL, you should select the check box.

Your Setting: ______________________________

Web Application Advanced Information Screen

The settings on this screen also apply to the internal portal site.

Internal Host Header: Generally, this will be the same as the **Public URL** setting. Therefore, keeping with our example, it would look like this: `CustPortalAdmin` or `CustPortalAdmin.<internal domain>` or `CustPortalAdmin.<yourcompany>.com`. The **Internal Host Header** setting would be different from the public URL only when you use more sophisticated routing techniques, such as a Reverse Proxy or URL rewrite rules. Also, if you chose to use SSL (digital certificates) for secure connections, this host header name must match the "Issued To" or "Common Name" on the digital certificate.

Your Internal Host Header: ______________________________

Internal IIS Web Site Port: Generally, you should use the standard http port 80, or, if you are using SSL, the standard https port 443. You can have multiple Web applications on the same port number. IIS keeps them separate based on the unique internal host header. It is best to use the standard port numbers.

Your Internal IIS Web Site Port: ______________________________

Use Port Number on Public URL: In this scenario, you should leave this check box cleared. By not specifying the port number on the public URL, the Web browsers automatically route traffic to your site using the standard port numbers. This results in the best user experience. IIS then routes requests to the correct Web application or extended Web application by using the internal host header that you configured for it.

Your Setting: ______________________________

Extended Web Application Screen

The settings on this screen apply to the external portal site (Internet), except for **Site Name**, which applies to both the administration and external sites.

Site Name: This is used as the name of the Web application when it is created in SharePoint. It is visible in SharePoint Central Administration, the IIS Manager, and in shortcuts created for opening the portal internal and external sites. For the administration site, the word “Administration” is automatically added to the name. You can use any descriptive name that helps you clarify the purpose of your various portals, and it must be unique from all existing Web application names. For example, if you install all three portals, your site names might be Customer Portal, Vendor Portal, and Reseller Portal. The administration site names then become Customer Portal Administration, Vendor Portal Administration, and Reseller Portal Administration.

Your Site Name: ____________________

Public URL: Portal users also navigate their browsers to the farm. Because of load balancing, they may be serviced by any machine in that farm. Set up a DNS record for your portal site, such as CustomerPortal, as part of your external DNS domain. It should point to the farm's load balancer.The entry may look like this: `CustomerPortal.<your company>.com`.

Your Public URL: ____________________

Use Secure Sockets Layer (SSL): In this case, you should use SSL and the check box should be selected.

Your Setting: ____________________

Extended Web Application Advanced Information Screen

The settings on this screen also apply to the external portal site.

Internal Host Header: Generally, this will be the same as the **Public URL** setting. Therefore, keeping with our example, it would look like this: `CustomerPortal.<your company>.com`. The **Internal Host Header** setting would be different from the public URL only when you use more sophisticated routing techniques, such as a Reverse Proxy or URL rewrite rules. Also, because you should use SSL (digital certificates) for secure connections, this host header name must match the “Issued To” or “Common Name” on the digital certificate.

Your Internal Host Header: ____________________

Internal IIS Web Site Port: Generally, you should use the standard https port 443 if you are using SSL.

Your Internal IIS Web Site Port: ____________________

Use Port Number on Public URL: In this case, you should again leave this check box cleared.

Your Setting: ____________________

In this scenario, if you install all three portals, you would end up with these Web applications:

Portal	URL	Port Number	User	Login
Customer Portal	CustPortalAdmin or CustPortalAdmin.<internal domain> or CustPortalAdmin.<yourcompany>.com	80 or 443	Portal Administrators	Windows or forms authentication
	CustomerPortal.<yourcompany>.com	443	Customers	Portal pre-login site page
Reseller Portal	ResellerPortalAdmin or ResellerPortalAdmin.<internal domain> or ResellerPortalAdmin.<yourcompany>.com	80 or 443	Portal Administrators	Windows or forms authentication
	ResellerPortal.<yourcompany>.com	443	Resellers	Portal pre-login site page
Vendor Portal	VendorPortalAdmin or VendorPortalAdmin.<internal domain> or VendorPortalAdmin.<yourcompany>.com	80 or 443	Portal Administrators	Windows or forms authentication
	VendorPortal.<yourcompany>.com	443	Vendors	Portal pre-login site page

Installing the Portal(s) and Portal Manager

This section provides information about the installation wizard and steps for completing a portal installation. After installing a portal, we recommend that you configure it before installing another portal, if applicable. Configuration information is provided after this section.

IMPORTANT: Before installing the portals, you must check to make sure that the Internet Information Services (IIS) options for enabling 32-bit applications are set to False. Follow these steps:

1. On the machine where you will install the portal(s), open IIS Manager.
2. In the Connections pane, expand the machine node and select **Application Pools**.
3. In the Actions pane, click **Set Application Pool Defaults**.
4. In the General section, make sure **Enable 32-Bit Applications** is set to False.
5. Click **OK**.
6. In the list of Application Pools, select **SecurityTokenServiceApplicationPool**.
7. In the Actions pane, under Edit Application Pool, click **Advanced Settings**.
8. Again, in the General section, make sure **Enable 32-Bit Applications** is set to False.

9. Click **OK**.
10. Close IIS Manager.

About the Wizard

You must run the installation wizard one time for each portal you wish to install. Portal content is added each time, and individual installations are required to create the Web applications necessary for each portal. You will indicate which Web applications to create (Customer, Vendor, or Reseller) when you specify an applicable **Site Name** in the wizard.

The wizard makes these changes to your SharePoint installation:

- Creates a Web application with Claims Based Authentication, enabling both Windows and forms-based authentication. The installer sets the Membership provider name to SyteLineMembershipProvider v3.0.0.0 and the Role manager name to SyteLineRoleProvider v3.0.0.0. This is used as the administration site for the portal.
- Extends the new Web application to:
  - Enable Claims Based Authentication using only Forms Based Authentication (FBA). The installer sets the Membership provider name to SyteLineMembershipProvider v3.0.0.0 and the Role manager name to SyteLineRoleProvider v3.0.0.0. This is used as the external portal site on the Internet.
  - Enable a custom login page. This is the initial page for the external portal.
- Sets the service account for the Web application and the Primary Site collection administrator to the SharePoint user name specified in the wizard.
- Sets the URLs, ports, and SSL options as specified in the wizard.
- Deploys the portal solutions to the Web application and to SharePoint Central Administration.
- Deploys portal content.

The wizard also installs Portal Manager and Portal Diagnostics.

Run the Installation Wizard

Log in to the machine in your SharePoint farm that you will use to install the portals. Log in as an administrator on the machine. We recommend using the **SPInstall** account described in “SharePoint Setup” on page 25. Also see that topic for recommendations regarding a SharePoint Standalone installation.

NOTE: If you are using Terminal Services to access the machine where you are installing the portals, you should open your local group policy editor on the server (or an Active Directory GPO) and enable the setting to turn off Windows Installer RDS Compatibility. It can be found here: `Computer Configuration\Administrative Templates\Windows Components\Remote Desktop Services\Remote Desktop Session Host\Application Compatibility`.

For more information, see http://www.gearbytes.com/2010/11/looping-windows-installer-coordinator/.

Download the Infor SyteLine Portals installation wizard file (`SL 9.00 Portal Install IPF 3.1 Build 70.exe`) from the Infor Xtreme Support portal. You can request the location of the file from your SyteLine customer service representative. Follow these steps:

1. Double-click the .exe file.
2. On the **Welcome** screen, click **Next**.
3. For the first installation, review the **Pre-Requirements** screen and when ready, click **Next**.
4. Do one of the following:
   - If this is the first or only portal to be installed, on the **Select Features** screen, specify the features to install:
     - Portal Architecture: This installs the portal architecture. When you select this option, Portal Manager is also selected by default.
     - Portal Manager: The Portal Manager is required for content activation, management, and backup, and for portal diagnostics. Administrators can use Portal Manager from machines other than where SharePoint and portal content are located, so you can install the Portal Manager by itself on other machines.
     - Portal Content: This option installs our portal content.

     After making your selection(s), click **Next**.
   - If this is the second or third portal to be installed, on the **Program Maintenance** screen, make sure **Add or Remove Features** is selected, click **Next**, and then on the **Select Features** screen make sure **Portal Architecture** is selected. (If you clear it, the architecture from the previous installation will be removed.) Click **Next**.
5. On the **Destination Folder** screen, do one of the following:
   - If this the first or only portal to be installed, specify the folder where the files should be installed on the machine. We recommend that you use the default path. This folder is where the Portal Manager, content files, and .wsp files (solutions) that create the SharePoint applications are stored. Click **Next**.
   - If this is the second or third portal to be installed, this screen is skipped, because additional portals are installed to the same location. Go to the next step.
   - If you are installing only the Portal Manager, we recommend that you use the default path. Click **Next** and skip to step 12.
6. On the **Web Applications** screen, specify whether to create a new Web application or use an existing one:
   - If this is a new installation of this portal, select **Create a new Web Application**. Click **Next**.
   - If this is a reinstallation of an existing portal Web application, select **Use existing Web Application** and then on the **Select Web Applications** screen select the Web application to use. Previously created, empty portal Web applications for Infor Portal Foundation (IPF) 3.0 are shown in the box on the left. Select the one to use and then click the arrow to move it to the box on the right. Click **Next** and skip to step 12.

     NOTE: If you move a Web application from the box on the right to the box on the left, it will be uninstalled.

7. On the **Application Pool Logon Information** screen, specify the **SPServices** SharePoint account as described in the table on page 27. This is the security account for the application pools that are created. It must be a Managed Account in SharePoint. (If you are installing in a SharePoint Standalone environment, see the note in "Set Up User Accounts for SharePoint" on page 25.)
   - **User name**: Specify the name in the format *domain\user name*.
   - **Password**: Specify the password for the above user name.

   Click **Next**.
8. On the **New Web Application** screen, specify this information to create the Web application, site, and security zones. Refer to the notes you kept in "Determining the Public URL and Other Portal Settings starting on page 30.
   - **Public URL:** Specify the URL for the administration portal. In our test environment example, it is the SharePoint server name.
   - **Use Secure Sockets Layer (SSL)**: By default this check box is not selected. If the administrator should have Internet access to the site and you are using SSL, select the check box.

   Click **Advanced**.
9. On the **Web Application Advanced Information** screen, specify these values:
   - **Internal Host Header**: Specify the host header for the administration portal. In our test environment example, it is the SharePoint server name. For a production environment, it can vary. See "Determining the Public URL and Other Portal Settings" on page 30.
   - **Internal IIS Web Site Port**: Specify the port number. In our test environment example, port numbers must be different for each Web application. For a production environment, they can be the same.
   - **Use Port Number on Public URL**: Select this check box only if you want to use the above port number on the public URL. In a test environment, you should select this option. In most production environments, you will not select this option.

   Click **OK** to close this screen and then on the **New Web Application** screen, click **Next**.
10. On the **Extended Web Application** screen, specify this information to create the external portal Web application, site, and security zones:
    - **Site Name**: Specify the Web site name; for example, Customer Portal.
    - **Public URL**: Specify the URL for the external portal. In our test environment example, it is the SharePoint server name.
    - **Use Secure Sockets Layer (SSL)**: Typically, you should select this option for the external portal site, unless it is in the test environment.

    Click **Advanced**.

11. On the **Extended Web Application Advanced Information** screen, specify these values:
    - **Internal Host Header**: Specify the host header for the external portal. In our test environment example, it is the SharePoint server name. For a production environment, it can vary. See “Determining the Public URL and Other Portal Settings” on page 30.
    - **Internal IIS Web Site Port**: Specify the port number. In our test environment example, port numbers must be different for each Web application. For a production environment, they can be the same.
    - **Use Port Number on Public URL**: Select this check box only if you want to use the above port number on the public URL. In a test environment, you should select this option. In most production environments, you will not select this option.

    Click **OK** to close this screen and then on the **Extended Web Application** screen, click **Next**.
12. Click **Install** to start the installation.
13. Click **Finish** to complete the installation. After installation is complete, shortcuts for the installed portal and Portal Manager are displayed on your desktop.

    The Web site shortcuts should **not** be used until after the portal is configured. Portal Manager can be used immediately.
    - **<Site Name> Administration**: This opens a login page for the administration portal.
    - **<Site Name>**: This opens the login page for the external portal site.
    - **Infor Portal Manager 3.1**: This opens the Portal Manager.

    NOTE: If the installer fails to complete successfully and there is no entry for a SyteLine portal in the Control Panel Programs and Features area, see “Cleaning Up After Portal Installation Failure” on page 180.

As stated before, you must run the installation wizard for each portal you plan to set up; however, before installing the next portal, we recommend that you configure the one you have just installed.

Binding Digital Certificates to the Web Applications

If your portal will use SSL/HTTPS, you must bind your digital certificates to each of the IIS instances that support the Web application(s) that have been configured for SSL in the SharePoint server farm. See the IIS Manager online help for the steps to take. During the binding process:

- On the Site Bindings page in IIS Manager, select the entry for the port that you specified when creating the Web application
- When you edit the binding for that entry, select the appropriate SSL certificate for the SharePoint server from the names in the list.

NOTE: If you have to change protocol, host name, or port settings specified during portal installation, see “Changing IIS Site Bindings” on page 128.

Configuring the Portal(s)

Portal configuration includes activating portal content, configuring data sources, and specifying general configuration settings. All of these tasks are performed using the Portal Manager. This section provides instructions for connecting to a portal site and completing portal configuration.

After you complete these tasks for each installed portal, you will set up SyteLine for use with the portal(s). Separate chapters are provided with setup procedures.

Connect to the Portal Site in Portal Manager

Each time you open Portal Manager, you must connect to the portal site to work with. To connect:

1. Double-click the Portal Manager shortcut on your desktop.
2. In the form that opens, specify the portal URL. This is the URL you specified in **Public URL** during installation.

   For example, `http://<SharePoint Server Name>:8080` or `http://CustomerPortalAdmin.<internal domain>`.
3. Do one of the following:
   - For initial use of Portal Manager, we recommend that you specify the **SPServices** application pool user name and password you used in the wizard during portal installation, because this user has the required permissions in SharePoint. (If you are using a SharePoint Standalone environment, see the note in “Set Up User Accounts for SharePoint” on page 25.) In the **Credentials** field, select Windows Authentication and then click **Connect**.
   - For later use of Portal Manager, after you have configured and tested the portal(s), you have these options:
     - To use your current Windows session credentials, and if you have specified the **Workstation Domain/ID** on the SyteLine **Users** form and set the **Use Workstation Logon** option in preferences, you can select **Use Windows logon credentials** and then click **Connect**.
     - You can specify your portal user account user ID and password and then indicate in the **Credentials** field whether it is a Windows account or a Forms account. Forms Authentication means that the account is stored in the authentication data source. (This option can be used only after the authentication data source is configured and functioning and your user account has been created in SyteLine. Both are explained later in this document.)

Activate Portal Content

When you install a SyteLine portal, the standard portal content — including site pages, layouts, page sets, style families, and help topics — is loaded but not yet activated for use. To activate content for the portal you have just installed:

1. Open the Portal Manager and connect to the portal administration site of the new installed portal. The **Configuration > Content Activation** tab is displayed.

2. Depending on which portal you have installed, click in the grid to update **Priority** and **Active** settings as needed. The required settings are specified here:

   Customer Portal

Originator	Priority	Feature Name	Active
SL 9.00	20		
		Default	Yes
		Customer Portal	Yes
		Reseller Portal Additions	
		Vendor Portal	
IPF 3.1	10		
		Demo	
		Default	Yes

   Vendor Portal

Originator	Priority	Feature Name	Active
SL 9.00	20		
		Default	Yes
		Customer Portal	
		Reseller Portal Additions	
		Vendor Portal	Yes
IPF 3.1	10		
		Demo	
		Default	Yes

   Reseller Portal

Originator	Priority	Feature Name	Active
SL 9.00	20		
		Default	Yes
		Customer Portal	Yes
		Reseller Portal Additions	Yes
		Vendor Portal	
IPF 3.1	10		
		Demo	
		Default	Yes

3. Click **Apply**. The content for your installed portal is activated.

   Information about activating custom content is provided in “Enabling a Portal for Development” on page 110.

Configure Data Sources

Data sources must be defined using the Portal Manager, so each portal knows where to get data from. If you have a multi-site implementation, the SyteLine data source configurations must include data sources for each SyteLine site the portals will access. These should be the same sites specified in an existing site group or in a new site group you will create for the portal. See "Creating the Customer Portal Site Group (Optional)" on page 52. Also refer to the *SyteLine Multi-Site Planning Guide* and *SyteLine Multi-Site Implementation Guide* for important details.

Before you configure data sources, make sure the database servers to which you will connect are up and running.

To configure data sources for a selected portal:

1. In Portal Manager, select **Configuration > Data Sources**.
2. Click the New (+) icon next to the Data Sources grid to create a data source for each of your SyteLine sites. For example, if you have sites in Ohio, Indiana, and Michigan, you would make these entries:

Name	Type
Infor ERP SyteLine 9.0 Ohio	SyteLine
Infor ERP SyteLine 9.0 Indiana	SyteLine
Infor ERP SyteLine 9.0 Michigan	SyteLine

IMPORTANT: For multi-site, we recommend that you add your authentication data source first, because the first data source entered is set to **Default**, **Translator**, and **Authenticator** by default. When you apply the SyteLine data source(s), you are prompted to push the authentication data source to SharePoint. Any time you change this setting and click **Apply**, you are prompted to push again. So it is most efficient to enter the authenticator data source first, so you don't have to change it. The **Default** and **Translator** settings can be changed as needed. All settings are described further near the end of this step.

If you have only one site, you would make one entry:

Name	Type
Infor ERP SyteLine 9.0 Ohio	SyteLine

After you add a new data source and click **OK**, you must specify this information for the data source:

- **Config Server URL**: Specify the URL that points to the SyteLine utility/Web server. This URL is added by default: `http://{server name}/IDORequestService/ConfigServer.aspx`. Generally, you need to replace `{server name}` with your utility server name. Tab to the next field.

  NOTE: If the following error is displayed when you exit this field, you specified an **https** secure protocol, but you do not have a valid digital certificate installed and bound, so you cannot save the configuration.

```
Configuration Error: Error processing an IDO request.
(Status:TrustFailure The remote certificate is invalid according
to the validation procedure.)
```

See the information below for the **Ignore Invalid Security Certificate** field.

- **Config Name**: Select a SyteLine configuration from the drop-down list. This is the configuration that the portal will access.
- **User ID** and **Password**: Specify a SyteLine user ID that is defined as a superuser in the SyteLine configuration named above. This administrative user briefly logs into SyteLine to validate user accounts when portal users sign in. We recommend that you specify the **SL_Internal** multi-session user and password.

  NOTE: When there are multiple portal applications installed on a SharePoint system using the same SyteLine utility server and configuration (as specified in the **Config Server URL** and **Config Name** fields), the same administrator account settings must be used here for all of the portals.
- **Ignore Invalid Security Certificate**: In a test environment, you can use an SSL certificate that is self-signed or that is signed using the internal or private key. Select this check box if you want the system to ignore the lack of a valid certificate and trust relationship for the SSL/TLS secure channel.

  Selecting this check box is **not** recommended for a live environment. If you select this check box now, but later you install a valid digital certificate, at that time you must clear this check box and save the configuration again. You must also refresh the IIS server pool.
- **Paired MSSQL Data Source**: For MSSQL data sources only, this setting is provided for customers who experience performance issues when accessing BLOB data. By selecting this check box, you can bypass the utility server when fetching images and documents. This allows you to stream images and attached binary documents separate from the SyteLine data source. A typical SyteLine implementation does not require this setting.

Click **Apply**.

You can click **Test Connection** to test each SyteLine data source you have added. You may have to click the refresh icon above the New (+) icon to enable the **Test Connection** button.

If you receive errors and would like to review the log file, you can right-click in the log display at the bottom of the screen and select **Locate Log File**.

Additional settings for the data sources are **Default**, **Translator**, and **Authenticator**. You can apply these settings as you add each data source or after adding all data sources.

- **Default**: Select this check box if the data source should be used by default when the system does not find a collection in IPF Collection Definitions. The Infor portals require that PortalSiteGroup (created in step 4 below) is set as the default.
- **Translator**: Select this check box for the SyteLine data source that should be used by the system to find string IDs. One data source must be set as the Translator.

- **Authenticator**: Select this check box for the SyteLine data source should be used for portal user password validation. One data source must be set as the Authenticator.

  When you apply the authenticator setting, a message to push the entry to STS is displayed. Click the link to open SharePoint Central Administration, click **Push Config to STS**, click **OK**, and then close the browser window. Back in Portal Manager, click **OK** to close the message box.

  If you happen to close the pop-up window before clicking the link, see “Pushing Portal Configuration Changes for a New Server in the Farm” on page 127 for instructions to display the page where you can push STS changes.

  Also, if you need to change the authentication data source, refer to “Changing the Authentication Data Source” on page 127 for more information.

NOTE: For the next three data sources you add, the names must be specified exactly as shown in the examples, with regard to capitalization and spacing.

3. Add the PrimarySite data source, which is an alias data source. This points to the SyteLine site from which it gets portal-enabled items and item category information. If you have only one SyteLine site, that is your Primary Site. If you have multiple sites, your master site must be used for the PrimarySite data source.

Name	Type
PrimarySite (no space)	Alias

   Click **Apply**.

4. Add the PortalSiteGroup data source, which is a multiplexed data source. In the **List of Data Source Names** grid, add all SyteLine sites from which data should be exposed on the portals. If you have only one site, then the PortalSiteGroup data source will use only that site. At least one alias must be assigned to each data source in PortalSiteGroup.

   To add sites, click the New (+) icon next to the lower grid. On the form that opens, select a data source to add and then click the New icon on that form. Specify the alias and then click **OK**. The alias **must be** the site code as shown in the **Site** field on the **General Parameters** form in each SyteLine site.

   The PortalSiteGroup must be set as the **Default** data source, so the results from one or more sites can be multiplexed together to view in the portal

Name	Type
PortalSiteGroup (no spaces)	Multiplexed

Sample list of Data Source Names

Name	Alias*
Infor ERP SyteLine 9.0 Ohio	OH1
Infor ERP SyteLine 9.0 Indiana	IN1
Infor ERP SyteLine 9.0 Michigan	MI1
* These are sample aliases. Your alias for each SyteLine data source must be the site code from the **Site** field on the **General Parameters** form.	

Click **Apply**.

5. Add a data source for SharePoint:

Name	Type
Local SharePoint Portal (with spaces)	SharePoint

Click **Apply**.

If you need to delete a data source record you have added, select the row, click the Delete icon, and then click **Apply**.

When complete, your data source configuration may look similar to this:

Data Source Name	Type	Default	Translator	Authenticator
Infor ERP SyteLine 9.0 Ohio	SyteLine		X	X
Infor ERP SyteLine 9.0 Indiana	SyteLine			
Infor ERP SyteLine 9.0 Michigan	SyteLine			
PrimarySite	Alias			
PortalSiteGroup	Multiplexed	X		
Local SharePoint Portal	SharePoint			

Set General Configuration Options

To set general configuration options:

1. In Portal Manager, select **Configuration > General**.
2. Specify this information:
   - **Pre-Login Account** user ID and password: For each portal, specify the SyteLine user ID and password you created for the pre-login user account. See “Create the Pre-Login User Account” on page 28.

     After applying this setting, you can click **Test** to verify the ID and password that you have entered.
   - **Viewable Page Set**: Specify the page set that should be viewable by users of this portal. The provided page sets are Default, PreloginPages, and ModalPages. For Customer Portal, you should select PreloginPages if you want to provide pre-login browsing of your portal pages. Otherwise, leave the field blank. For Vendor Portal

and Reseller portals, you should leave this field blank, unless you have created your own page set to use. Refer to the *Infor Portals Customization Guide* for more information.

- **Locale Settings**: For each portal, select the default locale appropriate for your portal(s). This usually is the domestic language used in the SyteLine configuration accessed by the portal. If you do not select a locale, it defaults to en-US.

  Also select any locales that should be supported in your portal. Ensure that the SyteLine configuration includes the appropriate text strings, category descriptions, overviews, etc. for each locale you select here. Also make sure that in SyteLine there is only one LocaleID for each language that you select here. You can also provide translated online help for this locale, as described in "Adding a Help Collection for a Different Locale" on page 119.

  For more information about how the portal chooses a locale, see "Internationalization" on page 258.

- **User Authenticated Event Handler**: For Customer Portal, select SessionStartCustomer. For Vendor Portal, select SessionStartVendor. And for Reseller Portal, select SessionStartReseller. If you create a custom script to add logic for a user-authenticated event in your portal, you will use this field to apply your custom file. Refer to the *Infor Portals Customization Guide* for more information.
- **Default Style Family**: Select a style family for your portal. The style families included with your installation are named according to color scheme. The only difference among these style families is color.

3. Click **Apply**.

NOTE: The **Enable Portal for Development** settings are used for personalizing and customizing the portals. See "Enabling a Portal for Development" on page 110 for more information.

The **Reset Pre-Login Permissions** button is used when changes are made to an authentication data source or to user or group permissions in SharePoint. See "Resetting Pre-Login Permissions" on page 127.

Specify Selected Page Set Styles (Optional)

To configure certain pages in your portal to use a different style family than the default set on the General tab, you can use the Page Sets tab to do so. You can associate existing or custom style families with existing or custom page sets. To associate custom style families and page sets, they must be created by a portal content developer prior to using this tab.

To configure page sets:

1. In Portal Manager, select **Configuration > Page Sets**.
2. Click the New (+) icon.
3. Select a page set and a style family and then click **OK**.

Save the Portal Configuration (Optional)

In the event that you need to restore or replicate a portal configuration, you can save a completed configuration and later load that configuration using Portal Manager.

When you save a configuration, all settings needed to restore a portal can be saved, including:

- Content activations
- Data sources
- General properties
- Page set and style family associations

To save a completed portal configuration:

1. In Portal Manager, select **Configuration > Save**.
2. On the form that opens, select the options to save.
   - To save the entire configuration, select all four options: Content Activations, Data Sources, General, and Page Sets.
   - To save selected options, expand each node and choose the options to save.
3. Click **Save**.
4. Specify a name and location for your configuration file and then click **Save**.

To load a saved portal configuration:

1. In Portal Manager, select **Configuration > Load**.
2. On the form that opens, locate the configuration file and then click **Open**.
3. On the form that opens, you have these options:
   - To load a complete configuration into an empty portal, click **Select Options** and then select all four options: Content Activations, Data Sources, General, and Page Sets. These settings from the specified configuration file will be loaded, and the portal will be ready to use.
   - To load selected options into the portal, click **Select Options** and then select the options you need from the specified configuration file.
   - To load a complete configuration into a portal for which some configuration settings already exist, click **Clear and Reload**. This option clears any existing settings so you can load all settings from the specified configuration file.
4. Click **Load**.

Set User Group Permissions in SharePoint

After adding data sources, set permissions for the portal so all SyteLine users who are members of the Customer Portal group (for a Customer Portal or Reseller Portal installation) or Vendor Portal group (for a Vendor Portal installation) have read-only access. Also set permissions for users in the Admin Portal group, so they can access the User Account Management Utility.

To set group permissions:

1. Using the shortcut on your desktop, open the portal administration site and sign in using Windows authentication. The portal's Default.aspx page is opened in SharePoint.
2. Select **Site Actions > Site Permissions**.
3. Select **Grant Permissions**.
4. On the **Grant Permissions** screen, under the Users/Groups box, click the browse (book) icon.
5. On the **Select People and Groups** screen, select **Forms Auth**, specify **Customer Portal** in the Find box for a Customer or Reseller Portal installation or **Vendor Portal** for a Vendor Portal installation and then click the search icon. The search should find the Customer Portal or Vendor Portal group.

   NOTE: The portal has a custom membership provider and a custom role manager defined that hook SharePoint to the user names and groups defined in SyteLine.
6. Select the group and then click **Add**.
7. In the Find box, specify **Admin Portal** and then click the search icon. The search should find the Admin Portal group.
8. Select the group, click **Add**, and then click **OK**.
9. Select **Grant users permission directly**, click **Read**, and then click **OK**. This setting ensures that SyteLine user accounts that have been assigned to the Customer Portal or Vendor Portal group will have only read permission when they log in to the portal. It also allows portal administrators to use the User Account Management Utility.
10. Close the portal administration site.

IMPORTANT: Never give full control to any group in All Users. This creates a security hole in your implementation.

Applying Portal Patches

After you've installed and configured all portals that you need, download and install any necessary portal patches, which are provided in SyteLine Solution KB 1459104 found on the Infor Xtreme Support portal at http://www.inforxtreme.com.

Testing the Portal(s)

This section explains how to test the administration site and external site for the portal you have just installed and configured.

Portal Administration Site

To test the portal administration site:

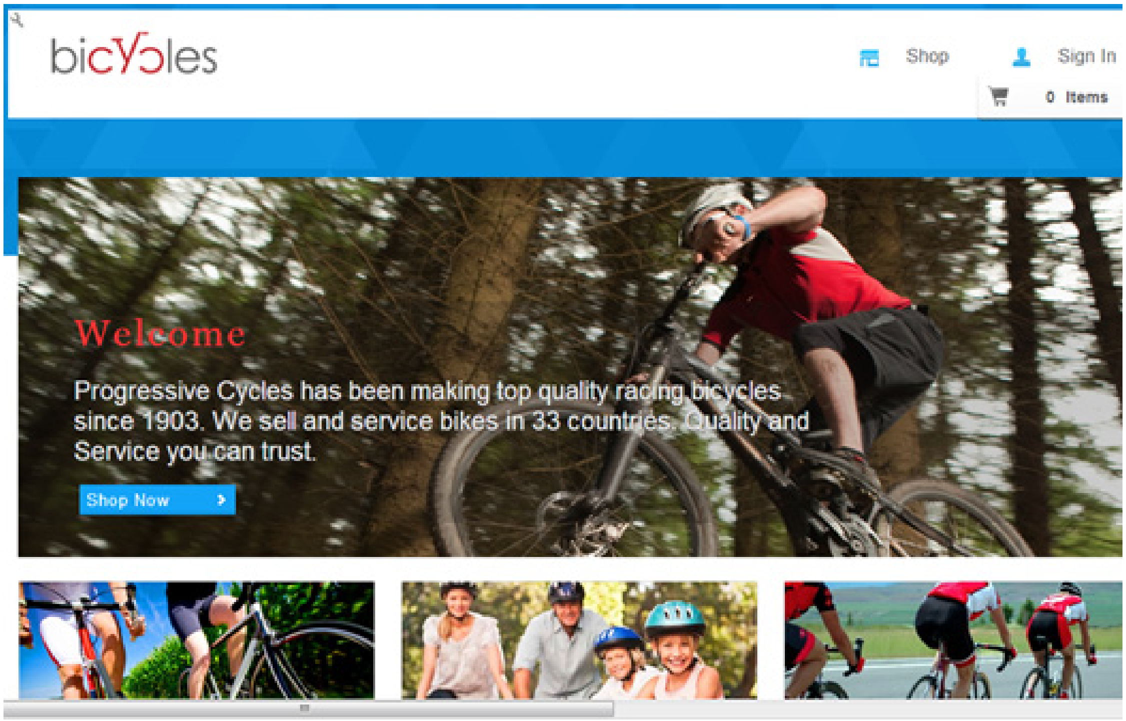
1. Using the shortcut on your desktop, open the portal administration site and sign in using Windows authentication. The portal's Default.aspx page is opened in SharePoint.
2. Select **Site Actions > View All Site Content**. You should see the following libraries and lists on the page:

Libraries	Lists
IPF Help Assets	Announcements
IPF Site Assets	FAQs
IPF Site Pages	IPF Collection Definitions
PressReleases	IPF Data Sources
Product Videos	IPF Feature Dependencies
Site Collection Help	IPF Field Display Formats
Style Library	IPF Installed Help Assets
Videos	IPF Installed Originators
White Papers	IPF Installed Site Assets
	IPF Installed Site Pages
	IPF Layouts
	IPF Menu Instances
	IPF Page Sets
	IPF Page Sets Style Families
	IPF Style Families

External Portal Site

With the necessary user account set up in SyteLine, as explained in “Set Up the Testing User Account(s)” on page 29, you can click the external portal site shortcut on the desktop to test your portal and see what your end users will see.

For Customer portal, the shortcut opens a pre-login Home page that allows you to browse the portal without logging in. Notice that there is no **Activity** menu at the top of the page:



You can sign in using the credentials for your test Customer Portal user account. After you sign in, a Home page that includes the **Activity** menu is displayed.

For the Vendor or Reseller portals, the shortcut opens a login page. You must sign in using the credentials for the test Vendor or Reseller Portal user account created in SyteLine.

Demo data is provided with the portals, so you can click on the various pages to see how they look. However, to test for specific data from your own database, you must set up SyteLine for each portal according to the information provided next in this guide.

If the portal shortcuts do not open the appropriate portal page, review the information in Chapter 15, “Troubleshooting”.

Setting Up SyteLine for the Customer Portal

3

This chapter provides steps for setting up SyteLine for use with the Customer Portal.

NOTE: For multi-site implementations, the table shows whether to perform each step in the Primary Site, all sites, or only desired sites. If your implementation has only one site, then that is the Primary Site.

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
1	Create a site group for the Customer Portal (optional).	Site Groups	Primary Site
2	Set up items and categories for your product catalog.	Items Item Categories Item Category Workbench Portal Parameters Related Item Reason Codes Multi-Lingual Items	Primary Site
3	Set up SyteLine to manage consigned inventory (optional).	Warehouses Item/Warehouse	All sites from which consigned inventory is provided.
4	Set up documents.	Groups Document Types Attached Documents	All sites
5	Add interaction topics in SyteLine.	Interaction Topics	All sites
6	Set up information about the customer's company.	Customers Customer Ship-Tos Customer Contracts	All sites, except for contracts and contract prices. See"Set Up Customer-Specific Items and Pricing (Optional)" on page 61 for more information.
7	Set up contact information for your company.	General Parameters Salespersons Employees or Vendors Customer Ship-Tos	All sites
8	Add portal-enabled user accounts.	See Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)"	All sites

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
9	Define replication rules. Required for multi-site implementations.	Replication Rules	All sites
10	Specify country codes for the Vertex tax system (optional).	Tax Interface Parameters	All sites
11	Allow portal users to reprint invoices.	Accounts Receivable Parameters Intranets Report Options	All sites
12	Set up language-independent aging bucket labels.	Accounts Receivable Parameters	All sites
13	Set up a default bank code.	Accounts Receivable Parameters	All sites
14	Set up ISO-based currency codes.	Currency Codes	All sites
15	Maintain ISO unit of measure codes.	Unit of Measure Codes	All sites
16	Set up event notifications.	Workflow Event Handler Activation Publication Subscribers	All sites
17	Configure order shipping alerts.	Event Triggers	All sites
18	Assign users to portal-related event global constants.	Event Global Constants	All sites
19	Enable viewing of service knowledge base entries.	Knowledge Base	All sites
20	Set up online ordering.	See Chapter 4, “Setting Up SyteLine for Online Ordering”	

Creating the Customer Portal Site Group (Optional)

If you have an existing site group on the **Site Groups** form in SyteLine, which contains all sites specified for your PortalSiteGroup during data source configuration, then you do not need to create a Customer Portal site group. You will simply select the existing site group when defining portal parameters. See “Specifying Portal Parameters” on page 73.

If your PortalSiteGroup data source contains sites other than those in an existing site group, you must create a new site group for the Customer Portal.

If you have only one site that is exposed to the Customer Portal and for which a site group does not exist, you still must create the Customer Portal site group and assign that site.

NOTE: If the Customer Portal site group contains different sites than your Accounts Receivable site group (as specified on the **Accounts Receivable Parameters** form), data on the portal Account Balance page will not equal that shown in SyteLine and may not represent accurate customer aging information. In this case, you may choose to hide the Account Balance page.

Setting Up Items and Categories

The following item and category information must be defined in SyteLine in order for the portal to work as expected.

NOTE: For multi-site implementations, items and categories must be specified in the Primary Site of the Customer Portal site group, even when an item is not manufactured in, shipped from, or priced at that site.

Standards for Pictures Used on the Portal

We recommend that you use image files of type PNG or JPG. PNG files are best for icons and simple vector-type images, which are typically stored in the Site Assets folder in SharePoint, while JPG files are best for photo images that are stored in SyteLine. Also, for best presentation and ease of adaptability to a change in theme background colors, we recommend that you use a transparent background for your icon image files.

Item Pictures

Ideally the item pictures you upload in SyteLine should be at least as large as the largest picture size displayed on the portal Product Details page, which is 800x600 pixels. For best viewing of this page, the picture should be at least this big; otherwise extra white space will surround the image, because the picture is not enlarged from what is stored in SyteLine, unless a specific style is used on the cell to zoom in on the image.

Also note that on devices that are retina-ready, the pixel ratio use is doubled, so for instance an 80x80 image is shown in a 40x40 space. The sharpness of the retina-ready image is achieved by doubling the amount of pixels used within the available image space. The portal is capable of intelligently determining if it is being displayed on a retina-ready device and will make the appropriate adjustment when necessary. Therefore, if you want your portal's images to look sharp when displayed on a retina-ready device, you should load pictures that are double the size that you need for the image when shown on a typical monitor, and then limit the display size by the height and width parameters on the image field display format.

On some pages, portal users can click a picture to display a pop-up window with a larger version of the selected item.

Category Pictures

Recommendations for category pictures are the same as for item pictures.

Banner Pictures

We recommend that banner pictures are 728X90 pixels, or 1456X180 pixels to support retina-ready devices.

NOTE: If a picture stored in SyteLine has a different aspect ratio than what is required by the field display format on the layout, the picture is scaled to fit inside the cell according to the height and width parameters of the field display format on that cell. Larger picture sizes are supported, but the user may have to scroll to see the whole picture, depending on the size of their browser window.

If no picture is stored with an item in SyteLine, then no picture can be displayed by the Image Field Display Format for that item. White space appears where the picture would normally display. However, the portal default is to put the style 'ItemImage' on all cells that should contain a SyteLine image, and the 'ItemImage' style has a background placeholder image to indicate when no image is returned from SyteLine.

Set Up Items and Pictures

On the **Items** form, you must enter all the required fields to describe an item in SyteLine. In addition, follow these steps to further define an item that is displayed on the portal:

1. On the Overview tab, specify a description of the item to be used as the default Item Overview text on the portal. (You will be able to enter the text in alternate languages later.)
2. Right-click in the **Item Picture** field to load a primary picture of the item into the database. This picture is displayed with the item on the Customer Portal.

   The primary picture is optional; however, if no picture is loaded, then the portal displays white space where that picture would normally display. See “Standards for Pictures Used on the Portal” on page 53 for information about standards to use when creating and loading pictures for use on the portal.
3. On the Pictures tab, load alternate views of the item. These views are displayed below the primary picture on the Customer Portal Product Details page, in the order used on the Pictures tab, **Sequence** grid. These pictures also are optional.
4. On the Overview tab, select **Active For Customer Portal** to display the item on the portal.

NOTE: Items that are marked **Active For Customer Porta**l are available through the Item search lists on the portal. However, if the item is not also assigned to an item category, as described in “Create the Item Category Hierarchy” on page 55, then it does not display in any category on the portal. Users can still find the item through the drop-down filters on the portal.

5. To include the item in the Featured Products section of the portal and on the Featured Products page, select **Featured Item**.
6. To include the item in the Top Sellers section of the portal and on the Top Sellers page, select **Top Seller**.

NOTE: To add items to categories for display on Customer Portal, we recommend that you use the **Item Category Workbench** form. The Item Categories tab on the **Items** form is intended for item category setup for the Vendor Portal.

Define Categories of Items

The portal can display items by category, so to use this feature you must define categories for your portal items using the **Item Categories** form. For example, if you are a bicycle parts manufacturer, you might have categories such as Headlights, Seats, Tires, etc.

After categories are defined, you can create an item category hierarchy, or category tree, to organize items for display on the portal.

NOTE: Categories are optional. If you do not set up any categories, then category search and browse features of the portal cannot be used. Customers can search only by item.

To define categories of items:

1. Open the **Item Categories** form.
2. Specify the category name and description.
3. Right-click in the **Category Banner** field to load a picture that applies to the category and should be displayed across the top of the Customer Portal Products page. The picture is shown when the You Searched For box on that page contains only one object: either a category or a category that includes a category set to **Is Category Heading**. The picture is not shown if there is nothing in the You Searched For box or if more than one category object is in the box. This picture is needed for only top-level categories in the category hierarchy.
4. Right-click in the **Category Picture** field to load a picture that applies to the category and is displayed on the Products page when multiple categories are shown.

   Category pictures are optional. If no picture is loaded, then the portal displays white space above the category title. See “Standards for Pictures Used on the Portal” on page 53 for information about standards to use when creating and loading pictures for use on the portal.
5. If the category is to be displayed on the portal, select **Active**.
6. If the category is to be a “container” for other categories, not items, in the item category hierarchy, select **Is Category Heading**. Category headings are displayed in larger and bold type on the portal.
7. Use the Translations tab to create category descriptions in different languages, to be displayed on the portal according to the user’s browser language setting.

NOTE: To add items to categories for display on Customer Portal, we recommend that you use the **Item Category Workbench** form. The Items tab on the **Item Categories** form is intended for item category setup for the Vendor Portal.

Create the Item Category Hierarchy

Using the **Item Category Workbench** form, you can add unlimited categories and subcategories to set up your item category hierarchy, and then associate items with the appropriate categories and subcategories. You also can remove categories and items as needed.

To create the item category hierarchy:

1. Open the **Item Category Workbench** form.
2. In the hierarchy tree on the left side of the form, select the category to which to add subcategories.
3. Make sure the **Display Current Search** field is cleared. All categories active for the portal and all items in the items table are displayed on the Categories and Items tabs.

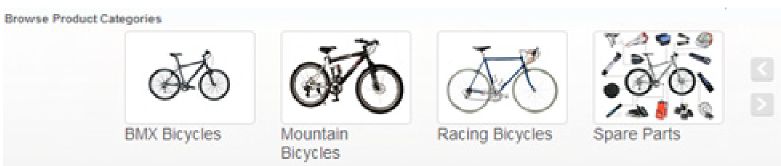
4. On the Categories tab, select subcategories to add to this category and then select **Actions > Save**.
5. Repeat steps 2 - 4 for as many categories and subcategories as needed for your structure.
6. In the hierarchy tree, select a category or subcategory to which to add items.
7. On the Items tab, select items to add and then select **Actions > Save**. The same item can be added to multiple categories.
8. Repeat steps 6 and 7 for as many categories and subcategories as needed. You can see how your item category hierarchy will appear to portal users by logging in to the Customer Portal and using the Products page to find items.

Enable Simplified Category Browsing (Optional)

You can choose whether to provide simple category browsing in addition to complex search functionality on your Customer Portal.

Complex searching is provided by default. Your customers can enter search criteria into **Category** and **Item** fields to find specific items in the catalog. Their search is tracked in a **You Searched For** box and an item category tree.

Simple browsing displays only a category menu with a slide-out subcategory menu. Two levels of categories can be displayed. Customers browse through the categories to find items.



To enable simplified category searching, select **Enable Category Browsing** on the SyteLine **Portal Parameters** form.

Add Reason Codes and Related Items (Optional)

You can link related items as “recommended items” that display when a user is looking at a particular item on the portal. To do this, you must first set up reason codes that indicate how the items are related.

On the **Related Item Reason Codes** form, specify a reason code and a description (for example, “Recommended Item”) for each relationship. The reason code and description are not displayed on the portal and are used only for reference. However, the reason code is required on the **Items** form if you add related items.

To add related items, on the **Items** form, Related Items tab, specify any items that should appear as “Recommended Items” when the selected item is displayed on the portal. Also select a reason code for the related items.

Add Language-Specific Information about Items (Optional)

In addition to the language-specific category descriptions you added with categories, you can specify language-specific item descriptions and item overviews.

1. On the **Multi-Lingual Items** form, select an item that is to be displayed on the portal and review the current overview text, as created and stored on the **Items** form in your domestic language.
2. Select a different language code.
3. Enter the Item Description and the Overview for the item in that language.
4. Repeat steps 2 and 3 for the item, for all languages in which the portal may be viewed.
5. Repeat all steps for all other items for the portal.

Setting Up Consigned Inventory (Optional)

SyteLine can track and process inventory that is consigned to a customer, and the customer can use the portal to review consigned inventory levels and submit used quantities.

If you provide consigned inventory to customers, you should set up the consignment warehouse, customer ship-to, and upper and lower boundaries for managing inventory replenishment in the consignment warehouse for all sites in the Customer Portal site group.

1. On the **Warehouses** form, select the warehouse to be used for inventory consigned to the customer, and set the **Consignment Type** to Customer. Also, in the **Customer** fields, select a customer and specific ship-to for the warehouse.
2. On the **Item/Warehouse** form, set the minimum and maximum consignment quantity for items in the consignment warehouse. These values are displayed on the portal's Consigned Inventory page. Alerts can be sent to portal subscribers when consignment quantity goes below the minimum or above the maximum requirement.

Setting Up Documents

The portal Documents function is used to provide controlled access to documents that are attached to specific records in SyteLine. Documents can be attached to item, order, estimate, incident, inventory, or service knowledge base records and viewed on the portal by users associated with those records. Documents can be added for the portal by a SyteLine user or they can be uploaded by a registered B2B portal user and then approved in SyteLine.

In order for portal users to access documents using the Customer Portal, you must perform the tasks in this section in all applicable sites in SyteLine.

Verify Group Requirements

These requirements can be verified using the SyteLine **Groups** form:

- SyteLine users who will work with documents must belong to the Standard Forms group, which gives them access to these forms:
  - Attached Documents
  - Documents
  - Document Objects Query
- SyteLine users must belong to groups that give them access to appropriate forms related to the documents used on the portal. For example, if SyteLine users are in a group that allows them to access the **Purchase Orders** form, then they will be able to add order documents in SyteLine and view and approve documents uploaded via the portal Order Status page.
- Customer Portal users must belong to the Customer Portal group, which is assigned during user account creation.

Create Document Categories

Use the **Document Types** form to create categories for the documents that can be attached to records, and also to assign groups to each document type, based on who should be able to access documents in the category.

The name you give a document type should be meaningful to B2B portal users, because they must select the type when uploading a document. For example, you might want to have Word documents (*.doc) attached to contracted inventory items. You can use the **Document Types** form to create a document type called "Item Docs" and associate the **File Extension** "doc" and **Media Type** "application/msword" with that type. This document type would then be used when attaching files to items in SyteLine or on the portal.

NOTE: You must provide a default extension for each document type, but documents with other extensions can be uploaded and downloaded for the category. For example, if you specify "txt" as the default extension, portal users can still upload a .pdf or .doc file for the category.

When you assign the Customer Portal group to this document type, you make documents in this category available to Customer Portal users. If you also assign the Inventory group to this document type, you make documents in this category available to users in the SyteLine Inventory group. See “Additional Portal Document Guidelines” on page 59.

Add Documents for Downloading

To add documents in SyteLine that can be downloaded on the portal:

1. Open a form that contains a collection for which to attach a document for downloading, such as **Items** or **Estimates**.

2. Select the record to which to attach a document and then select **Actions > Documents for Current**. This opens the **Attached Documents** form so you can attach the document.

   Specify the required information and then import the document. Do not select **Internal**, because then the document cannot be shared on the portal. Make sure to specify the **Document Type**. When you specify the **Document Type**, the groups assigned to this category are displayed in **Shared Groups**.

3. Save the record.

NOTE: Portal users must be subscribed to the CustomerDocumentUploadAlert publication to receive notifications when documents are added for them in SyteLine. They can subscribe themselves using a setting on the portal Account Management page, or you can subscribe them in SyteLine. See “Setting Up Customer Event Notifications” on page 64.

Approve Uploaded Documents

When a document is uploaded on the portal, its status must be changed from Pending to Approved in SyteLine, so it is accessible on the portal. This is an ongoing administrative task. See “Approving Uploaded Documents” on page 125.

Additional Portal Document Guidelines

Following are additional notes about documents and document types:

- Any document that is to be viewable on the Customer Portal must be associated with the Customer Portal group. As described above, this is accomplished by assigning the Customer Portal group to the document type and then assigning the document type to the document.
- At least one document type must be associated with the Customer Portal group, or no documents will be visible and no document can be uploaded via the portal.
- Document types must allow for shared groups to be included in the collection of groups. For example, an item document that is to be shared across the Customer Portal requires that, in addition to the Customer Portal group, the group maintaining the item in SyteLine is assigned to the document type. The Customer Portal group permissions would not allow a customer to update or delete the document, but due to its document type (category), the customer would be able to view the document.
- When adding a document, users cannot use a document type for which they are excluded from the group collection. The user must have insert permissions on a shared group.
- You can use the **Document Group Management** form to see documents associated by group and document type. This form displays only documents associated with the Customer Portal group or the Vendor Portal group, and it shows all the documents that customers or vendors can view on the portals.
- For multi-site implementations, on the Document Upload form that B2B customers use to upload a document from the portal, the **Upload Site** field displays the site to which the document will be uploaded. The site is based on the document object, which is determined by the page from which the user uploads a document:

- From the Customers page, the document is uploaded to the Primary Site.
- From the Order Status page header, the document is uploaded to the site where the order was created.
- From the Order Status page line item, the document is uploaded to the site from which the item was shipped.
- From the Estimates page header or line item, the document is uploaded to the site where the estimate was created.
- From the Product Details page, the document is uploaded to the Primary Site.

Viewing Documents on the Portal

The portal Documents page displays documents associated with customer records. Only documents for the logged-in customer are visible.

To view documents about other types of records, such as incidents or orders, portal users must click the Documents icon displayed with an individual record on the related portal pages.

Adding Interaction Topics

Portal users can create interactions to send you about various records on the portal, and to do so, they must select a predefined topic description. You must add these topic descriptions using the SyteLine **Interaction Topics** form.

When defining interaction topics for a multi-site implementation, the same topics should be defined in each site of the Customer Portal site group. Also, the topics should be translated to the same languages in each site. For more information, see “Creating the Customer Portal Site Group (Optional)” on page 52 and refer to the *Multi-Site Planning Guide*.

Setting Up Information about the Customer’s Company

For Customer Portal users who are employees of your customer’s company, you must have some basic information about the customer’s company set up in SyteLine before the customer user logs into your portal for the first time. This information is displayed in various sections of the Account Management page. Portal users can submit updates to some, but not all, of this information.

The following records for the customer should be created in all sites of the Customer Portal site group.

Set Up a Customer Record

On the **Customers** form, make sure this information is set up:

- Company Name
- Address (including County and Country)
- Language

- Currency
- Credit Limit
- Internet URL
- Order Contact Name, Phone, Fax, External E-mail and Internal E-mail
- Billing Contact Name and Phone

Set Up Ship To Addresses for the Customer

Set up at least one Ship To address for the customer on the **Customer Ship-Tos** form. Make sure this information is set up:

- Ship To Name (Customer Portal users can select different addresses by name)
- Ship To Address (including County and Country)
- Ship To Contact Name, Phone, Fax, and E-mail

Set Up Customer-Specific Items and Pricing (Optional)

If your customer refers to your items with a different item number, you can cross-reference their item numbers to your items on the **Customer Contracts** form. Then, when users from that customer company log into the portal, they can view or look up their item numbers.

Any special or contract pricing related to the customer for specific items, as specified on the **Customer Contracts** form, is displayed on the portal instead of the standard pricing for that item.

For a multi-site implementation, all customer contracts must be maintained in the Primary Site and in the item's portal pricing site. Customer contract prices must be maintained in the item's portal pricing site and, optionally, can also be maintained in the Primary Site.

Setting Up Contact Information for Your Company

In order to support the portal Contact Us page, you must set up these areas in SyteLine:

Specify Company Address, Phone and E-Mail

On the **General Parameters** form, specify company contact information on the Address tab. All of this information except the site and the e-mail address is displayed on the Contact Us page of the portal.

The e-mail address you specify on the **General Parameters** form is used when customers submit a question or comment from the Contact Us page. If no e-mail address is specified on the **General Parameters** form, then the **Send Questions or Comments** button is not displayed on the portal.

Specify Salesperson Name, Phone, and E-mail for Customer Ship-To Addresses

When customers log into the portal, the Contact Us page lists contact information for the salesperson who is assigned to each of that customer's Ship-To addresses.

You must specify the following information in every site of the Customer Portal site group:

1. On the **Salespersons** form, make sure each salesperson has a Reference Number (either an employee number or a vendor number) assigned. The salesperson's phone and e-mail address on the Contact Us page is taken from the appropriate Employee record for inside salespeople or Vendor record for outside salespeople.
2. On the **Employees** or **Vendors** form, as appropriate for the salesperson in the previous step, make sure that the **Business Phone** and **E-Mail Address** fields (on Employees) or **Contact Phone** and **External E-Mail** fields (on Vendors) are completed.
3. On the **Customer Ship-Tos** form, select a **Salesperson** code for each Ship To address for each portal customer. This is the salesperson whose information will appear on the Contact Us page. If you do not specify a **Salesperson** code, the "Salesperson: Contacts" information on the Contact Us page will be blank.

NOTE: For Customer Portal users who are assigned to a reseller, the **Salesperson** field is populated automatically with the reseller's salesperson ID when the customer is registered online. For more information, see "Adding Customers for a Reseller" on page 82 and "Creating Portal User Accounts with the User Account Management Utility" on page 102.

Adding Customer Portal User Accounts

Although portal users never see SyteLine forms, they do access SyteLine data through IDOs and so they must have a user account in SyteLine, with the appropriate licensing and permissions. The portal user logs in through SharePoint using this SyteLine user name and password.

Tasks for adding user accounts are provided in Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)".

After adding user accounts, you can complete the remaining tasks in this chapter.

Defining Replication Rules for the Customer Portal Category

This requirement is for only multi-site implementations.

In each site used by the portal, use the **Replication Rules** form to define replication rules for all sites that belong to the Customer Portal site group. Refer to SyteLine online help topics for more information about replication.

Specifying Country Codes for the Vertex Tax System (Optional)

If your **Customer/Vendor Tax Code** on the **Tax Systems** form is set to EXTRNL and your **Tax System** on the **Tax Interface Parameters** form is set to Vertex, then you must specify default country codes in the **US Country** and **Canada Country** fields on the Vertex

Parameters tab of the **Tax Interface Parameters** form. If these fields are not specified, an error is displayed on the portal when a user tries to register a new customer.

Allowing Customer Portal Users to Reprint Invoices

On the portal Invoices page, users may be able to request that a reprinted copy of an invoice be e-mailed to them. To set this up:

- On the **Accounts Receivable Parameters** form, **Use Preprinted Forms** must *not* be selected. If using preprinted forms is a requirement for your company, then you must hide the Invoices page, and all links to it, on your portal. See “Hiding Menu Options (Optional)” on page 116 for information about how to do this.
- Specify SMTP settings and select **Send Email Notification** on the SyteLine **Intranets** form for the intranet associated with the SyteLine site linked to the portal.
- The portal user must have an e-mail address associated with their SyteLine user account.

Also in SyteLine, a record for the portal user must be added to the **Report Options** form, with these fields specified and all other fields blank:

- User: The SyteLine user ID assigned to the portal user.
- Output Format: Acrobat Format
- E-mail Notification: Yes
- Attach Report: Yes
- Auto-View: No

  You can add these records manually in SyteLine, or a record will be added automatically the first time a portal user requests an invoice.

Setting Up Language-Independent Aging Bucket Labels

On the Account Balance page of the portal, the aging buckets you define on the SyteLine **Accounts Receivable Parameters** form are displayed. The titles for these buckets cannot be modified to accommodate different languages, so you must use language-independent titles.

On the **Accounts Receivable Parameters** form, Aging Report tab, set each of the titles to a language-independent label. For example, the title for the <= 30 Days bucket could be set to **<= 30** rather than **Current**.

You must set up aging buckets the same way in all sites associated with the Customer Portal site group.

Setting Up a Default Bank Code

New customers records added to SyteLine from the Customer Portal use the bank code specified on the SyteLine **Accounts Receivable Parameters** form, so you must ensure that a default bank code is set on that form.

Setting Up ISO-Based Currency Codes

In order for currency translations to work properly on the portal, you must use ISO currency codes, or map your non-ISO currency codes to ISO currency codes on the SyteLine **Currency Codes** form. See the SyteLine online help about “Currency Codes”.

Setting Up ISO Unit of Measure Codes

In order for item units of measure to be displayed on portal pages, you must maintain ISO unit of measure codes on the SyteLine **Unit of Measure Codes** form. See the SyteLine online help about “Unit of Measure Codes”.

Setting Up Customer Event Notifications

Most of the notifications, confirmations, and requests sent back and forth between the Customer Portal and SyteLine are handled by the SyteLine Application Event System. Some events use workflow event handlers and require subscription to a publication. Other events fire automatically based on a trigger in the system. In order to fully use the event system, you must activate the necessary workflow event handlers and subscribe users to appropriate publications, as described in the following topics.

Activate Workflow Event Handlers

Default versions of the event handlers, with predefined subject lines and messages, are already set up and can be used as-is. You must activate the appropriate handlers in all sites.

1. On the **Workflow Event Handler Activation** form, filter the form to show only event handlers where the **Application** field is set to **SyteLine Customer Portal**. Currently, these event handlers are available:
   - Alert Customer Portal Users of New Interaction
   - Alert on Order Shipping
   - Alert SyteLine Users of Customer Interaction
   - Alert Users of a New Customer Portal Document
   - Alert Users of a New Customer Document
   - Notify Portal Incident Created

- Notify Portal RMA Approved
- Notify Portal RMA Rejected
- Notify Portal RMA Request Created
- Notify Portal Unit Registration Approval
- Notify Portal Unit Registration Created
- Notify Portal Unit Registration Rejected
- Send Portal Question/Comment E-mail

2. For each of these event handlers, select the **Active for This Site** check box.
3. Optionally, you can also choose to customize the information that is sent in the notifications. Refer to the SyteLine online help about workflow event handlers.

Subscribe Users to Portal-Related Publications

In order for users to receive notifications for various portal events, they must be subscribed to the appropriate publications in all sites. These predefined Customer Portal publications can send notifications to subscribed users:

- CPConsignedInvLevelAlert
- CPVendorInteractionAlert
- CustomerDocumentUploadAlert
- OrderShippingAlert
- PortalIncidentAlert
- PortalOrderReceivedAlert
- PortalOrderRequestDateBeforeDueDateAlert
- PortalUnitRegistrationAlert
- SLCustomerInteractionAlert
- SpecialPromotionsAnnouncements
- TaxCodeEvaluationAlert

Use the **Publication Subscribers** form to subscribe appropriate Infor Service Management or portal users to publications. Refer to the summary on the next page for more information.

NOTE: On the portal Account Management page, all portal users can select check boxes to subscribe to the CPConsignedInvLevelAlert, CPVendorInteractionAlert, CustomerDocumentUploadAlert, OrderShippingAlert, and/or SpecialPromotionsAnnouncements publications. When a portal user selects a check box on the Account Management page, that user is automatically added to the **Publication Subscribers** form as a subscriber to the publication in all relevant sites. No setup is needed on your part. If a portal user clears a check box on the Account Management page, that user is removed from the **Publication Subscribers** form.

Summary of Event Setup

For user to get notification of:	Activate this workflow event handler in all sites:	Subscribe user to this publication in all sites:	Subscription can be set for:
Orders placed on the portal	N/A[††]	PortalOrderReceivedAlert	SyteLine users
Portal orders placed with request date before due date	N/A[††]	PortalOrderRequestDateBeforeDueDateAlert	SyteLine users
Interactions from the vendor	Alert Customer Portal Users of New Interaction	CPVendorInteractionAlert	Portal users*
Interactions from portal users	Alert SyteLine Users of Customer Interaction	SLCustomerInteractionAlert	SyteLine users
Shipped orders	Alert on Order Shipping	OrderShippingAlert	Portal users*
New customer documents added in SyteLine	Alert Users of a New Customer Document	CustomerDocumentUploadAlert	SyteLine and portal users*
New customer documents added on the portal	Alert Users of a New Customer Portal Document	CustomerDocumentUploadAlert	SyteLine users
Incidents entered on the portal	Notify Portal Incident Created	PortalIncidentAlert	SyteLine users**
RMA requests entered on the portal	Notify Portal RMA Request Created	N/A***	N/A
Portal RMA requests approved in SyteLine	Notify Portal RMA Approved	N/A***	N/A
Portal RMA requests rejected in SyteLine	Notify Portal RMA Rejected	N/A***	N/A
Units registered on the portal	Notify Portal Unit Registration Created	PortalUnitRegistrationAlert	SyteLine users[†]
Unit registrations approved in SyteLine	Notify Portal Unit Registration Approval	N/A***	N/A[†]
Unit registrations rejected in SyteLine	Notify Portal Unit Registration Reject	N/A***	N/A[†]
User submitted a comment or question from the portal	Send Portal Question/Comment E-mail	N/A***	N/A
The quantity of consigned inventory has gone above or below set limits	N/A[††]	CPConsignedInvLevelAlert	Portal users*
Announcements or promotions received	N/A[††]	SpecialPromotionsAnnouncements	Portal users*
A new customer has been created on the portal, and tax code defaulting is enabled, but there is no default tax code record associated with the new customer's ship-to address	N/A[††]	TaxCodeEvaluationAlert	SyteLine users

* Portal users can subscribe or unsubscribe using a check box on the portal Account Management page.

** Portal users do not have to be subscribed to alerts for this event. They receive e-mail confirmation if **Send External Notifications** is set for them and an e-mail address is provided on the **Users** form.

*** No publication is associated with these event handlers. Stored procedures and/or global constants are used to send messages for some event handlers.

† Portal users do not have to be subscribed to alerts for these events. They receive e-mail confirmation based on the e-mail address specified when registering a unit from the portal.

†† No event handler is associated with these publications. Stored procedures and/or global constants are used to send messages for some publications.

Configuring Order Shipping Alerts

The Alert on Order Shipping workflow event handler is set by default to check for new order shipments every day at 3:00 p.m. You can change this default value by updating the event trigger values:

1. Select the Alert on Order Shipping event handler on the **Workflow Event Handler Activation** form.
2. Click **Event Triggers**.
3. Change the Condition, Condition Retest Interval, and Trigger Reset Interval values. By default, the trigger fires daily at 3 p.m., sleeps for 23 3/4 hours and then awakens and checks each minute until 3 p.m. arrives again.

Assigning Users to Event Global Constants

When a Customer Portal user creates an order using the Consigned Inventory page, the notification sent from Customer Portal to SyteLine is handled by a SyteLine event global constant. You must add user IDs to this global constant for the users in SyteLine who should receive notification from the portal.

1. On the **Event Global Constants** form, filter the form to show only portal-related global constants. For example, specify **portal*** in the **Name** field and then click the filter icon.
2. Select the PortalCoCreatedManagerID global constant, and in the **Value** field, specify one or more user IDs for each SyteLine user who should receive notification from the portal. Separate user IDs with semi-colons (;) and no spaces.

Enable Viewing of Service Knowledge Base Entries

In order for a service knowledge base entry to be viewed by portal users, it must be set to **Available to Customers** in SyteLine.

1. Open the SyteLine **Knowledge Base** form.
2. Select the entry to enable for viewing on the portal, or create a new entry.
3. Select **Available to Customers**.
4. Save the record.

Setting Up SyteLine for Online Ordering

4

This chapter provides steps for setting up online ordering functionality for your customers. After this setup is complete, your registered customers will be able to browse your catalog, add items to an order, submit orders online, check order status, track shipments, and more.

NOTE: If you have installed the Customer and Reseller portals, these topics apply to both, because Reseller Portal includes Customer Portal functionality.

NOTE: For multi-site implementations, the table shows whether to perform each step in the Primary Site, all sites, or only desired sites. If your implementation has only one site, then that is the Primary Site.

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
1	Set up shipping charges.	Freight Charge Methods Ship Methods Ship Via Codes Multi-Lingual Ship Methods Ship Method Groups Customers Multi-Site Customers Items Multi-Site Items	All sites
2	Specify portal parameters.	Portal Parameters	Primary Site
3	Specify items, item categories, and the item category hierarchy, if not already completed.	Item Category Workbench	Primary Site
4	Specify portal pricing sites for items.	Items APS Sites and Alternative Management	Set the default pricing site for items in the Primary Site. Set pricing options in individual sites.
5	Activate prices for portal orders.	Portal Pricing Pre-Activation Portal Pricing Review Portal Pricing Activation	Perform pre-activation and review from individual sites. Perform activation from the Primary Site.
6	Activate currencies for the portals.	Currency Codes	All sites
7	Define all tax codes in every site of the Customer Portal site group.	Tax Codes	All sites

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
8	Add customer tax codes, by location, for all sites in the Customer Portal site group.	Address Tax Code Defaults	All sites
9	Add country codes to province and state records (optional).	Prov/States	Primary Site
10	Set up credit card processing (optional).	See the *Infor SyteLine – Credit Card Interface Implementation Guide*	

Before You Start

Before you begin setting up online ordering, read the following overview topics about how it works.

Pre-Login Functionality

Visitors to your portal can access some pages without being registered or logged in. They can browse your catalog and add items to the cart. Items not yet purchased can remain in the cart from prior visits in pre-login mode. The cart is identified by use of a cookie placed on the user's computer. Users can update this cart as needed. At this point, the cart is an estimate in SyteLine.

If the user logs in, the user login ID and the customer number associated with the user is updated on the pre-login cart, the cookie is cleared, and the cart is considered a post-login cart. If the user returns to the portal in pre-login mode, the cart will be empty. But if they log in, the un-placed post-login estimate, identified by their user ID and customer number, will be displayed in the cart.

If the user's browser is not set to accept cookies, any items added to the cart in pre-login mode are visible only during the current session, unless the user logs in. Upon login, the pre-login cart becomes a post-login cart.

It is possible for a user to have both a pre-login and a post-login cart. In this case, when the user logs in, the pre-login cart is copied to the post-login cart leaving only the post-login cart. The user can see their un-placed post-login cart on return visits after logging in.

Estimation of shipping charges is available in pre-login mode, however estimation of taxes cannot occur until a user has logged in.

NOTE: SyteLine users can purge older un-placed orders by removing order line items from an order one at a time.

Item Pricing

After you set up and activate prices in each site for the portal, each item's default price is displayed on the Products, Product Details, Featured Products, Top Sellers, Contract Order, and Place Order pages.

If pricing options exist for an item, that item's price has an asterisk next to it and a link to open the Pricing Options form. Pricing options from the item's default pricing site and based on the quantity ordered are available to all B2C users whether or not they are signed in to the portal. These pricing options are also available to B2B users when they are not signed in. Once a B2B user logs in to the portal, their pricing options are based instead on a customer contract or on an item that is priced out of multiple sites, if applicable. Other pricing site rules for B2C and B2B users are described here:

B2C	B2B	Rule
X	X	Sees pricing from item's default pricing site
X	X	The order line ship site is set to the default pricing site
X	X	Can see quantity-on-hand totals for the default pricing site
	X	Can see quantity-on-hand totals per pricing site
	X	Can see per site pricing
	X	Can select item prices from different pricing sites

User Registration and Login

B2C users who have not yet registered are required to do so on the Place Order page prior to submitting an order. The user is prompted to enter a user name, password, e-mail address, shipping information, and billing information. A customer record, customer address record, and customer user name record are added in SyteLine. The records are created in every site in the Customer Portal site group. Tax codes are added by default, if configured. The customer number is added to the order.

B2B users will already have been registered by a SyteLine user.

Both B2C and B2B users must log in prior to submitting an order.

Submitting Orders

Once all desired items are added to an order, users go to the Place Order page to verify and edit order details (and register and/or log in, if they haven't already). B2B users must select a payment method. B2C users can pay only by credit card, so they are not prompted for a payment method. If you do not provide the credit card interface for your portal, B2C users must call you to complete their order.

After all required data has been entered, the estimate order is copied to a customer order in SyteLine with a status of “Planned”. This allows taxes to be added. Tax, shipping, and order totals are calculated and displayed to the user. The order estimate status is changed to “History”.

After the user clicks **Submit**, the order status is changed to “Ordered”. An order confirmation page is displayed and an order verification report is e-mailed to the user.

Order Status and Shipping Confirmation

All users have access to the Order Status page after they are signed in to the portal. On this page, they can verify the status of their orders and view order tracking information.

Portal users who sign up to receive order shipping alerts (on the Account Management page, Profile Information section) are notified by e-mail when all or part of their orders have shipped.

Shipping, Invoicing, and Payment Application

Standard SyteLine processing is used for shipping, invoicing, and payment application. For credit card payments, the Credit Card Interface is used to apply the payment to related invoices.

Setting Up Shipping Charges for Portal Orders

When orders are placed using Customer or Reseller Portal, shipping charges must be calculated before the order is submitted, so shoppers know how much they will be charged.

To set up shipping charges for portal orders, follow these steps in all sites in the Customer Portal site group:

1. On the **Freight Charge Methods** form, create freight charge methods to be associated with portal ship methods.
2. On the **Ship Methods** form, create ship methods for business-to-consumer (B2C) users and for business-to-business (B2B) users whose method of payment is Credit Card. Be sure to select **Active For Customer Portal** for each method. Also select **International** if the method can be used for international shipments.
3. On the **Ship Via Codes** form, select **Active For Customer Portal** to activate ship via codes for B2B users whose method of payment is On Account. Also select **International** if the code(s) can be used for international shipments.
4. Optionally, on the **Multi-Lingual Ship Methods** form, create multi-lingual ship method descriptions.
5. On the **Ship Method Groups** form, create ship method groups.
6. On the **Customers** or **Multi-Site Customers** forms, specify a ship method group.
7. Optionally, on the **Items** or **Multi-Site Items** form, specify a freight amount that is to be charged for portal-enabled items that require special freight charges. This amount overrides the default **Charge Per Item** set on the **Freight Charge Methods** form.

For more information about using each of the forms in this task, review the form and field online help in SyteLine.

Specifying Portal Parameters

In the Primary Site, open the SyteLine **Portal Parameters** form and specify this information:

- **Site Group**: In the Customer and Reseller Portals section, select the site group containing sites that should provided data on the portal.

  As noted in "Creating the Customer Portal Site Group (Optional)" on page 52, in order for data on the portal Account Balance page to be accurate, this site group must be the same as the multi-site group used on the SyteLine **Accounts Receivable Parameters** form. It should be a group in which the customer table is replicated to all sites in the group.

- **Default Ship Method Group**: Specify the default ship method group to be used for new Customer Portal users who register online and for all existing Customer or Reseller Portal users whose payment method is credit card but who may not yet have a ship method group assigned.
- **Customer Prefix**: In the Primary Site only, specify a default prefix to be used for customers added from the Customer Portal, so you can distinguish these customers from customers added using SyteLine. If you leave this field blank, the SyteLine customer number prefix is used by default.
- **Order Prefix**: In the Primary Site only, specify a default prefix to be used for orders entered in Customer Portal, so you can distinguish them from orders added in SyteLine. If you leave this field blank, the SyteLine order number prefix is used by default.
- **Phone**: If B2C users log in to the Customer Portal to place orders, but the Credit Card Interface is not installed or is not active, a message is displayed instructing them to contact the vendor. In this field, specify the phone number to be included in that message. If this field is left blank, the phone number specified on the **General Parameters** form for the portal Primary Site is used in the message.
- **Validate Portal Address**: Select this check box to require that portal users' state and country entries for shipping information are validated against the state/country combinations specified on the SyteLine **Prov/State** form.

  When this check box is selected, a user must specify a state and country that are included in the drop-down lists presented to them. If the check box is cleared, a customer can specify any state and country name, whether or not they are in the lists.

- **Enable Category Browsing**: When this check box is selected, a category menu with a slide-out subcategory menu is included on the Products page for simplified catalog browsing. Two levels of subcategories can be displayed in the slide-out menu. When cleared, the categories menu is not displayed, and portal users must enter search criteria to find specific items in the catalog.

Specifying Items, Item Categories, and the Item Category Hierarchy

All portal-enabled items (items that are set to **Active For Customer Portal**), item categories, and the item category hierarchy must be entered in the Primary Site, even if the item is not manufactured in, shipped from, or priced from that site. Steps for adding item and category information are provided in “Setting Up Items and Categories” on page 53.

Specifying Portal Pricing Sites

A new field in the item table, **Portal Pricing Site**, is used to indicate the site from which each item’s pricing and customer contract pricing is to be retrieved by default. This field must be maintained in the Primary Site item table for all portal-enabled items. Item prices can be included from sites other than this Portal Pricing Site, however, by default the portal retrieves an item’s price from the site identified in this field. In the Primary Site, open the **Items** form and specify the **Portal Pricing Site** for each item that is active for the portals.

Item pricing from additional sites also can be shown on the portal for selected items, which gives customers pricing options. In each site from which to display a different price for the item, open the **Items** form and select **Portal Pricing Enabled**.

In order for expected ship dates to be calculated for portal users, you must also add to multi-site APS all sites within the Customer Portal site group that have portal-pricing-enabled items. In the Primary Site, open the **APS Sites and Alternative Management** form and add all applicable sites.

Activating Prices for the Portals

Prices must be pre-activated, by site, for each site included in the Customer Portal site group. These proposed prices can be reviewed and updated, and when they are final, they must be activated from the Primary Site for use on the Customer and Reseller portals. Depending on your business processes, a different person may perform pre-activation for each site in your Customer Portal site group; however, price activation should be controlled by one person who logs in to SyteLine for the Primary Site.

1. Log in to a site in the Customer Portal site group.
2. Make sure **Active For Customer Portal** is selected on the **Items** or **Multi-Site Items** form and **Currency Codes** form for each item and currency that should be available on the Customer Portal.
3. Open the **Portal Pricing Pre-Activation** form and specify a starting and ending item number for which to activate prices.

   NOTE: The first time you activate prices, you may prefer to leave the **Starting Item** and **Ending Item** fields blank, so prices are created for all items. Later, if you change pricing for a particular set of items, you can specify just that range of item numbers.

4. Click **Process**. A message is displayed indicating how many portal prices were created and if any errors were detected during the process.
5. Open the **Portal Pricing Review** form to review the pricing records and error messages if any problems occurred. It is recommended, but not required, that errors be corrected during pre-activation. Possible errors are described here:

Error Message	What To Do
Please review the tax in price errors found for (item number).	Check to make sure the **Include Tax In Price** field on the **Customers** form for a specific customer matches the **Include Tax In Price** field on the **Customer Contract Prices** form for that same customer and a specific item. Both must be selected or cleared.
Unable to determine List Price for (item number).	Evaluate the item and its price on the **Item Pricing** form. If there is no price for the item, create one, and then try running **Portal Pricing Pre-Activation** again. If the error remains, it is most likely a software error, and you will need to contact us for help.
Unable to determine Customer Price for (item number).	Verify the item on the **Items** form, the customer record on the **Customers** form, and that all needed conversion records exist on the **Unit of Measure Conversions** form between the customer's unit of measure for the item and the base unit of measure for the item.
Unable to determine Break Quantity and Break Prices for (item number).	Verify the break quantity pricing on the **Item Pricing**, **Price Formulas**, and **Customer Contract Pricing** forms for the given item.
List Price for (item number) could not be converted to customer currency.	Verify that valid rates exist on the **Currency Rates** form for all supported portal currencies and for the base currency of the current site.
Customer Price for (item number) could not be converted to base currency.	Verify that valid rates exist on the **Currency Rates** form for all supported portal currencies and for the base currency of the current site.

6. If you had errors, you should run the **Portal Pricing Pre-Activation** utility again. Repeat until no more corrections are needed.
7. When prices are ready for use on the Customer Portal, communicate to the person who activates prices that your site prices are ready. If you are that person, continue with the next step.
8. Log in to the portal Primary Site and open the **Portal Pricing Activation** form.
9. Do one of the following:
   - To activate prices for all sites at once, leave the **Site** field blank.
   - To activate prices for one site, select that site in the **Site** field.
10. Activation is prevented if any price configuration errors occur, so it is best to run the process in Preview mode first. Select **Preview** and then click **Process**.

    Errors are displayed in the grid and can include:

    - Pricing is not enabled for default pricing site. This means the **Portal Pricing Enabled** field on the **Items** form has not been selected for the item in its default pricing site.

- Default pricing is not defined. This means the **Portal Pricing Site** field on the **Items** form has not been selected for the item in the Primary Site. All items that are active for the Customer Portal must have a default pricing site.

11. Correct any errors found and run the preview again until no more corrections are needed.
12. When prices are ready for activation, select **Commit** and then click **Process**.

    Prices are activated for use on Customer Portal and their status is changed from N (Next) to C (Current) on the **Portal Pricing Review** form.

Activating Currencies

Open the **Currency Codes** form and select **Active For Customer Portal** for each currency that is supported on the portal.

For multi-site implementations, you must select this setting for the same supported currencies in all sites of the Customer Portal site group.

The domestic currency, which is the currency code specified on the **General Parameters** form, must be marked as active for Customer Portal in all sites as well.

Defining Tax Codes

Use the SyteLine **Tax Codes** form to define all tax codes in every site of the Customer Portal site group. For example, tax code OH must exist in every site in the Customer Portal site group and refer to the same taxing entity.

Adding Customer Tax Codes

Tax code defaults based on the customer's ship-to address are used for Customer Portal orders. The codes must be set up using the **Address Tax Code Defaults** form in SyteLine. You can enter tax codes all at once or as needed to do business with customers in different locations. At least one address tax code for each country to which a sale or purchase can occur should be created for each site in the Customer Portal site group.

If someone registers online to use the Customer Portal, but a tax code is not available in SyteLine for their shipping address, their orders are automatically placed on hold. A **Ship Hold** field is selected automatically on the **Customer Ship-Tos** form for each ship-to record and on the **Customer Orders** form for all new orders created for that customer. This prevents orders from being shipped until the check box is manually cleared. An alert is published for subscribers to TaxCodeEvaluationAlert. When you receive the alert, you must enter a tax code for the customer on the **Address Tax Code Defaults** form and clear the **Ship Hold** check box in SyteLine.

For more information, review the form and field online help in SyteLine.

Adding Country Codes to Province and State Records (Optional)

If you have set the portal parameter to **Validate Portal Address**, then you must add a country code for each province and state record in SyteLine. In the Primary Site, open the **Prov/States** form and specify codes in the **Country** field.

Setting Up Credit Card Processing (Optional)

In order for your customers to pay for online orders using a credit card, you must complete the following tasks. More information about these tasks is provided in the *Infor SyteLine - Credit Card Interface Implementation Guide*.

- Install the Infor SyteLine Credit Card Interface (CCI) add-on product.
- Install the CCI gateway software. Currently, CCI supports two gateway providers: TGATE and Intrix.
- Configure the CCI parameters in SyteLine to connect to the gateway.
- Establish a relationship with a credit card processor.
- Test credit card authorizations.

If you do not provide for credit card orders, your customers must call in to complete a Customer Portal order.

When customers do pay by credit card using the Customer Portal, a **Paid By Credit Card** field on the **Customer Orders** form is selected automatically for their orders. Also on this form and the **Estimates** form, the **Portal Order** field is selected automatically for any order or estimate received from the Customer Portal.

Setting Up SyteLine for the Reseller Portal

5

This chapter provides steps for setting up SyteLine for use with the Reseller Portal.

NOTE: The Reseller Portal provides Web pages and functionality for your customers who are set up as resellers in SyteLine. This portal includes all of the pages from the Customer Portal, which the reseller can use as your customer or for reseller tasks. Therefore, the setup tasks required here are in addition to setup tasks performed for Customer Portal.

NOTE: For multi-site implementations, the table shows whether to perform each step in the Primary Site, all sites, or only desired sites. If your implementation has only one site, then that is the Primary Site.

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
1	Set up reseller records.	Vendors Salespersons Commission Table Maintenance Customers or Multi-Site Customers Customer Ship-Tos or Multi-Site Customer Ship-Tos Partners	All sites
2	Add portal-enabled user accounts.	See Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)"	All sites
3	Add customers for the reseller.	Customers Customer Ship-Tos	All sites
4	Associate existing customers with a reseller.	Customer Ship-Tos	All sites
5	Set up SyteLine Service portal parameters.	Service Parameters	All sites
6	Set up event notifications.	Workflow Event Handler Activation	All sites

Setting Up Resellers

In SyteLine, resellers are SyteLine customers that are also distributors. To make a SyteLine customer a reseller, the customer must be set up as the following:

- A Vendor, to get paid for commissions earned when the reseller’s customers place orders.
- A Salesperson, to associate other existing SyteLine customers that belong to this reseller.
- A Customer Portal and Reseller Portal user, to log in to the Customer and/or Reseller portals.
- A SyteLine Service Partner, to submit and get paid for service request order (SRO) transactions from the portal.

Follow these steps:

1. In the Customer Portal site group’s Primary Site, which may be your only site, complete these tasks to create the reseller:
   a. On the **Vendors** form, select an existing vendor record or create a record to represent this reseller. The reseller’s commission checks will be sent to the header address, or remit-to address if one exists, on this form.
   b. On the **Salespersons** form, create a Salesperson record for this reseller. Select **Outside** and **Portal Reseller**, and specify the **Ref Num** of the vendor record from step 1.
   c. On the **Commission Table Maintenance** form, specify the commission percentage for the reseller’s salesperson ID. You must enter an asterisk (*) in the **Product Code** field, so the commission percentage is the same for all product codes. Enter the percentage in only the first **Commission** field.
2. On the **Customers** or **Multi-Site Customers** form, create a customer record for this reseller. In the **Reseller’s Salesperson** field, specify the salesperson ID from step 1b. For multi-site implementations, this must be completed in every site of the Customer Portal site group, using the same customer number in each site.
3. Optionally, on the **Customer Ship-Tos** or **Multi-Site Customer Ship-Tos** form, select the customer record from step 2 and in the **Salesperson** field, specify the same salesperson ID. This allows the reseller to receive commissions for his or her own purchases. For multi-site implementations, this must be completed in every site of the Customer Portal site group, using the same salesperson ID in each site.
4. On the SyteLine Service **Partners** form, set up the reseller as a partner and be sure to specify this information:
   - **Type:** Select Customer.
   - **Ref Num**: Select the reseller’s customer number from step 2.
   - **Active**: Select this option to make the record active.
   - **Default Payment Type**: Specify the default payment type to use when the reseller enters a new SRO Miscellaneous transaction on the portal.

- **User**: If the partner needs to be associated with a specific SyteLine user account, select the user ID. Once the user ID is specified, then SRO transactions against this partner ID can be submitted from the portal by only this user account. No other SyteLine user account can submit SRO transactions against this partner, even if the user is associated with the reseller. If a partner record needs to be shared by multiple SyteLine user accounts, leave the **User** field blank so any SyteLine user associated with the reseller can submit SRO transactions against this partner.
- **Reimburse Material**: Select this option so the reseller can be reimbursed for SRO material transactions.
- **Reimburse Labor**: Select this option so the reseller can be reimbursed for SRO labor transactions.

NOTE: For resellers in a multi-site implementation, a Customer, Salesperson, Commission, and Vendor record must exist in each site of the Customer Portal site group and they must be kept in sync with each other between sites. The Reseller's Salesperson must reference the same Salesperson. The Salesperson must reference the same Vendor. The Commission record must have the correct commission percentage for the Salesperson.

The User Account Management Utility helps to put these tables in sync; however, the utility does not create customer records. All customer records must be created manually in SyteLine. The utility can create the Salesperson, Commission, and Vendor records when missing in sites where the customer record of the reseller exists. See "About the User Account Management Utility" on page 102.

Adding SyteLine User Accounts for Resellers

Although Reseller Portal users never see SyteLine forms, they do access SyteLine data through IDOs and so they must have a user account in SyteLine, with the appropriate licensing and permissions. The portal user logs in through SharePoint using this SyteLine user name and password.

Tasks for adding SyteLine user accounts are provided in Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)".

Adding Customers for a Reseller

After a reseller has been set up correctly in all sites of the Customer Portal site group, new customers for that reseller can be added in these ways:

- You can create a Customer record and all of the customer's Ship-To records in the Customer Portal Primary Site using SyteLine. Set the **Salesperson** on each Ship-To record to the salesperson that represents the reseller (this is the **Reseller's Salesperson** on the reseller's Customer record).

  Next, create the SyteLine user account and associate it to the new Customer record.This can be done manually or using the portal User Account Management Utility. See Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)". If done manually, you will need to create these records in every site in the Customer Portal site group.

- The reseller can provide his or her portal redirect link to a potential customer, and that customer can go to the Customer Portal and register for an account. For more information, see "Customers" on page 153. Also, the reseller can use the Reseller Portal to register new customers.

  In these cases, no additional SyteLine user setup is needed. The Customer, Customer Address, Customer Username, User, User E-mail, and User Group records are created automatically in every site in the Customer Portal site group. An alert is published for SyteLine and Reseller Portal subscribers to the NewCustomerCreatedAlert to let them know a customer record has been created.

Associating Existing Customers to a Reseller

To assign a reseller to an existing customer account:

On the **Customer Ship-Tos** form, select the existing customer and then set the **Salesperson** field to the salesperson that represents the reseller (this is the **Reseller's Salesperson** on the reseller's Customer record). Do this for each of the customer's Ship-To records across all sites in the Customer Portal site group.

Next, create the SyteLine user account and associate it to the existing Customer record.This can be done manually or using the portal User Account Management Utility. See Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)". If done manually, you will need to create these records in every site in the Customer Portal site group.

Setting Up SyteLine Service Portal Parameters

In addition to entering partner default settings in SyteLine Service, you must also specify service parameter defaults. On the SyteLine Service **Service Parameters** form, Portal tab, specify this information:

- **Default SSR**: The service support representative to be used by default for incidents created on the portal.
- **Default Status Code**: The status to be used by default for incidents created on the portal.
- **Default Owner**: The owner to be used by default for incidents created on the portal.

Also indicate if resellers should be allowed to set incident priority when submitting an incident from the portal.

Refer to form and field online help for more information.

Setting Up Reseller Event Notifications

In addition to the event notifications described in “Setting Up Customer Event Notifications” on page 64, these event notifications must be set up for the Reseller Portal:

For user to get notification of:	Activate this workflow event handler in all sites:	Subscribe user to this publication in all sites:	Subscription can be set for:
New customers created on the portal	N/A	NewCustomerCreatedAlert*	SyteLine users and Reseller Portal users
Orders placed on the portal	N/A	PortalOrderReceivedAlert*	SyteLine users and Reseller Portal users
Portal orders placed with request date before due date	N/A	PortalOrderRequestDateBeforeDueDateAlert	SyteLine users
SRO labor transactions entered on the portal	Notify Portal SRO Labor Transaction Created	PortalSROLaborTransactionAlert	SyteLine users**
SRO material transactions entered on the portal	Notify Portal SRO Matl Transaction Created	PortalSROMatlTransactionAlert	SyteLine users**
SRO miscellaneous transactions entered on the portal	Notify Portal SRO Misc Transaction Created	PortalSROMiscTransactionAlert	SyteLine users**

* If a reseller wants to receive e-mails for these alerts, the reseller users should be subscribed to this publication with Key Value set to their salesperson ID (for example, Key Value = JAR). When any customer with slsman = JAR is registered or places an order in the portal, the reseller is notified by e-mail. SyteLine users who want to receive these alerts should subscribe with Key Value set to Null, so they get e-mail when any customer is created or order is placed from the portal.
** Portal users do not have to be subscribed to alerts for these events. They receive e-mail confirmation if **Send External Notifications** is set and an e-mail address is provided on the **Users** form.

Setting Up SyteLine for the Vendor Portal

6

This chapter provides steps for setting up SyteLine for use with the Vendor Portal.

NOTE: For multi-site implementations, the table shows whether to perform each step in the Primary Site, all sites, or only desired sites. If your implementation has only one site, then that is the Primary Site.

Step	Description	SyteLine Forms	For Multi-Site, Perform In...
1	Create a site group for the Vendor Portal (optional).	Site Groups	Primary Site
2	Specify portal parameters.	Portal Parameters	Primary Site
3	Set up SyteLine to manage consigned inventory (optional).	Warehouses Item/Warehouse	All sites
4	Set up documents.	Groups Document Types Attached Documents	All sites
5	Set up item price requests.	Items Item Categories or Vendors	All sites
6	Set up planned orders.	Purchasing Parameters Vendor Contracts Vendors Multi-Site Vendors Report Options	All sites
7	Add interaction topics.	Interaction Topics	All sites
8	Set up information about the vendor’s company.	Vendors Vendor Contracts	All sites
9	Set up contact information for your company.	General Parameters Vendors	All sites
10	Add portal-enabled user accounts.	See Chapter 7, “Setting Up and Managing SyteLine User Accounts for the Portal(s)”	All sites
11	Set up a default bank code.	Accounts Payable Parameters	All sites
12	Maintain ISO unit of measure codes.	Unit of Measure Codes	All sites
13	Set up event notifications.	Workflow Event Handler Activation Publication Subscriptions	All sites
14	Assign user to portal-related event global constants.	Event Global Constants	All sites

Creating the Vendor Portal Site Group (Optional)

If you have an existing site group on the **Site Groups** form in SyteLine, which contains all sites specified for your PortalSiteGroup during data source configuration, then you do not need to create a Vendor Portal site group. You will simply select the existing site group when defining portal parameters in the next task.

If your PortalSiteGroup data source contains sites other than those in an existing site group, you must create a new site group for the Vendor Portal.

If you have only one site that is exposed to the Vendor Portal and for which a site group does not exist, you still must create the Vendor Portal site group and assign that site.

Specifying Portal Parameters for Vendor Portal

In the Primary Site in the Vendor Portal site group, open the SyteLine **Portal Parameters** form and select the site group containing sites that should provided data on the Vendor Portal.

Setting Up Consigned Inventory (Optional)

SyteLine can track and process inventory consigned by a vendor, and the vendor can use the portal to review consigned inventory levels and evaluate past consumption.

If you get consigned inventory from vendors, you should set up the consignment warehouse and upper and lower boundaries for managing inventory replenishment in the consignment warehouse.

1. On the **Warehouses** form, select the warehouse to be used for inventory consigned from the vendor, set the consignment type to Vendor, and specify the vendor and the location from which consignment inventory will be consumed.
2. On the **Item/Warehouse** form, set the minimum and maximum consignment quantity for items in the consignment warehouse. These values are displayed on the portal’s Consigned Inventory page. Alerts can be sent to portal subscribers when consignment quantity goes below the minimum or above the maximum requirement.

Setting Up Documents

The portal Documents function is used to provide controlled access to documents that are attached to specific records in SyteLine. Documents can be attached to purchase order and product price contract records and viewed on the portal by users associated with those records. Documents can be added for the portal by a SyteLine user or they can be uploaded by a portal user and then approved in SyteLine.

In order for portal users to access documents using the Vendor Portal, you must perform the tasks in this section in all applicable sites in SyteLine.

Verify Group Requirements

These requirements can be verified using the SyteLine **Groups** form:

- SyteLine users who will work with documents must belong to the Standard Forms group, which gives them access to these forms:
  - Attached Documents
  - Documents
  - Document Objects Query
- SyteLine users must belong to groups that give them access to appropriate forms related to the documents used on the portal. For example, if SyteLine users are in a group that allows them to access the **Purchase Orders** form, then they will be able to add order documents in SyteLine and view and approve documents uploaded via the portal Purchase Orders page.
- Vendor Portal users must belong to the Vendor Portal group, which is assigned during user account creation.

Create Document Categories

Use the **Document Types** form to create categories for the documents that can be attached to records, and also to assign groups to each document type, based on who should be able to access documents in the category.

The name you give a document type should be meaningful to portal users, because they must select the type when uploading a document. For example, you might want to have Word documents (*.doc) attached to POs. You can use the **Document Types** form to create a document type called "PO Docs" and associate the **File Extension** "doc" and **Media Type** "application/msword" with that type. This document type would then be used when attaching files to POs in SyteLine or on the portal.

NOTE: You must provide a default extension for each document type, but documents with other extensions can be uploaded and downloaded for the category. For example, if you specify "txt" as the default extension, portal users can still upload a .pdf or .doc file for the category.

When you assign the Vendor Portal group to this document type, you make documents in this category available to Vendor Portal users. If you also assign the Purchasing group to this document type, you make documents in this category available to users in the SyteLine Purchasing group. See “Additional Portal Document Guidelines” on page 88.

Add Documents for Downloading

To add documents in SyteLine that can be downloaded on the portal:

1. Open the form that contains a collection for which to attach a document for downloading, such as **Purchase Orders** or **Vendor Contracts**.
2. Select the record to which to attach a document and then select **Actions > Documents for Current**. This opens the **Attached Documents** form so you can attach the document.

   Specify the required information and then import the document. Do not select **Internal**, because then the document cannot be shared on the portal. Make sure to specify the **Document Type**. When you specify the **Document Type**, the groups assigned to this category are displayed in **Shared Groups**.
3. Save the record.

NOTE: Portal users must be subscribed to the VendorDocumentUploadAlert publication to receive notifications when documents are added for them in SyteLine. They can subscribe themselves using a setting on the portal My Profile page, or you can subscribe them in SyteLine. See “Setting Up Vendor Event Notifications” on page 93.

Approve Uploaded Documents

When a document is uploaded on the portal, its status must be changed from Pending to Approved in SyteLine, so it is accessible on the portal. This is an ongoing administrative task. See “Approving Uploaded Documents” on page 125.

Additional Portal Document Guidelines

Following are additional notes about documents and document types:

- Any document that is to be viewable on the Vendor Portal must be associated with the Vendor Portal group. As described above, this is accomplished by assigning the Vendor Portal group to the document type and then assigning the document type to the document.
- At least one document type must be associated with the Vendor Portal group, or no documents will be visible and no document can be uploaded via the portal.
- Document types must allow for shared groups to be included in the collection of groups. For example, a purchase order document that is to be shared across the Vendor Portal requires that, in addition to the Vendor Portal group, the group maintaining the PO in SyteLine is assigned to the document type. The Vendor Portal group permissions would not allow a vendor to update or delete the document, but due to its document type (category), the vendor would be able to view the document.
- When adding a document, users cannot use a document type for which they are excluded from the group collection. The user must have insert permissions on a shared group.
- You can use the **Document Group Management** form to see documents associated by group and document type. This form displays only documents associated with the Customer Portal group or the Vendor Portal group, and it shows all the documents that customers or vendors can view on the portals.

- For multi-site implementations, on the Document Upload form that vendors use to upload a document from the portal, the **Upload Site** field displays the site to which the document will be uploaded. The site is based on the document object, which is determined by the page from which the user uploads a document:
  - From the Purchase Orders page header or line item, the document is uploaded to the site where the PO was created.
  - From the Product Price Contracts page, the document is uploaded to the site where the contract was created.

Viewing Documents on the Portal

The portal Documents page displays documents associated with vendor records. Only documents for the logged-in vendor are visible.

To view documents about other POs or pricing contracts, portal users must click the Documents icon displayed with an individual record on the related portal pages.

Setting Up Item Price Requests

To set up item price request functionality, you must add items to item categories using the SyteLine **Items** form and then associate vendors with the item categories using the SyteLine **Item Categories** form or **Vendors** form. This should be done in all sites in the Vendor Portal site group.

With this information set, users can enter an item price request using the SyteLine **Item Price Requests** form, or create the request from an existing planned order or PO requisition line.

When an item price request is made, only vendors tied to the same category or categories with which that item is associated will see the request on the portal.

Setting Up Planned Orders

On the Vendor Portal Planned Orders page, vendors can review planned orders generated during your latest planner run for the items they supply.

You can also allow them to confirm planned orders online, which converts them to purchase orders or purchase order requisitions in your system.

To set up this functionality:

1. On the SyteLine **Purchasing Parameters** form, specify a vendor-created PO and/or PO requisition prefix. These prefixes are used when a vendor creates a purchase order or purchase order requisition by firming a planned order using Vendor Portal.
2. Set the **Allow to Firm PLNs** option in SyteLine:
   - Use the SyteLine **Vendors** or **Multi-Site Vendors** form to set this option by vendor. This allows the vendor to firm planned orders for all of their contracted items displayed on the portal.

- Use the SyteLine **Vendor Contracts** form to set this option by item. This allows the vendor to firm planned orders for only the items you specify.

3. After selecting the **Allow to Firm PLNs** option for the vendor or item, on the same form, specify this information:
   - **Firm PLN Target**: Indicate whether planned orders should be firmed to purchase order requisition lines or purchase order lines.
   - **Firmed PO Line Status**: If you selected PO lines as the target, indicate whether the created PO line should be set to a status of "Planned" or "Ordered".
   - **Replenishment PO**: Optionally, you can select a replenishment PO, so that any firmed planned orders are attached to this replenishment PO. If you specify a replenishment PO at the vendor and/or item level, the planned order firming process may not use it if the pending planned order count would push the PO line numbers to exceed the limit for that PO. In this case, a new PO is created, and it uses the vendor-created PO prefix defined on the SyteLine **Purchasing Parameters** form.
4. In order for portal users to receive PO and PO requisition reports as attachments, a record for the portal user must be added to the **Report Options** form, with these fields specified and all other fields blank:
   - User: The SyteLine user ID assigned to the portal user.
   - Output Format: Acrobat Format
   - E-mail Notification: Yes
   - Attach Report: Yes
   - Auto-View: No

   You can add these records manually in SyteLine, or a record will be added automatically the first time a portal user confirms a planned order.

Adding Interaction Topics

Portal users can create interactions to send you about various records on the portal, and to do so, they must select a predefined topic. You must add these topics using the SyteLine **Interaction Topics** form.

When defining interaction topics for a multi-site implementation, the same topics should be defined in each site of the Vendor Portal site group. Also, the topics should be translated to the same languages in each site. For more information, see "Creating the Vendor Portal Site Group (Optional)" on page 86 and refer to the *Multi-Site Planning Guide*.

Setting Up Information about the Vendor's Company

The Vendor Portal user is an employee of your vendor's company. You must have some basic information about the vendor's company set up in SyteLine before the vendor user logs into your portal for the first time. This information is displayed on the My Company Profile page. The portal user can submit updates to some, but not all, of the information on the profile page.

Set Up a Vendor Record

On the **Vendors** form, make sure this information, which is displayed on the portal, is set up:

- Company Name
- Internet URL
- Language
- Currency
- FOB (free on board location)
- LCR (letter of credit required or not)
- Address (including County and Country)
- Remit To Address
- Vendor Contact Name, Phone, Fax, External E-mail and Internal E-mail

Set Up Vendor Items and Pricing (Optional)

If your vendor refers to your items with a different item number, you can cross-reference their item numbers to your items on the **Vendor Contracts** form. Then, when users from that vendor company log into the portal, they can view or look up their item numbers.

Any special or contract pricing related to the vendor for specific items, as specified on the **Vendor Contracts** form, is displayed on the portal instead of the standard pricing for that item.

Setting Up Contact Information for Your Company

In order to support the Contact Us page of the portals, you must set up these areas in SyteLine.

Specify Company Address, Phone and E-Mail

On the **General Parameters** form, specify company contact information on the Address tab. All of this information except the site and the e-mail address is displayed on the Contact Us page of the portals.

The e-mail address you specify on the **General Parameters** form is used when vendors submit a question or comment from the Contact Us page. If no e-mail address is specified on the **General Parameters** form, then the **Send Questions or Comments** button is not displayed on the portal.

Specify a Buyer

When vendors log into the portal, the Contact Us page lists the name and e-mail address for the buyer who is assigned to that vendor.

On the **Vendors** form, specify the SyteLine user who is normally the buyer for each Vendor Portal user.

Adding Vendor Portal User Accounts

Although Vendor Portal users never see SyteLine forms, they do access SyteLine data through IDOs and so they must have a user account in SyteLine, with the appropriate licensing and permissions. The portal user logs in through SharePoint using this SyteLine user name and password. Tasks for adding user accounts are provided in Chapter 7, “Setting Up and Managing SyteLine User Accounts for the Portal(s)”.

After adding user accounts, you can complete the remaining tasks in this chapter.

Setting Up a Default Bank Code

New vendor records added to SyteLine from the portals use the bank code specified on the SyteLine **Accounts Payable Parameters** form, so you must ensure that a default bank code is set on that form. Vendor records are created in SyteLine in these cases:

- When a portal administrator is logged in to the Vendor Portal and running the User Account Management Utility to copy vendor portal user accounts from the Primary Site to other sites.
- When a portal administrator is logged in to the Reseller Portal and running the User Account Management Utility to copy a reseller account from the Primary Site to other sites.
- When a portal administrator is logged in to the Customer Portal and running the User Account Management Utility to copy a reseller’s customer user account from the Primary Site to other sites.

Setting Up ISO Unit of Measure Codes

In order for item units of measure to be displayed on portal pages, you must maintain ISO unit of measure codes on the SyteLine **Unit of Measure Codes** form. See the online help for “Unit of Measure Codes” for information about how to do this.

Setting Up Vendor Event Notifications

Most of the notifications, confirmations, and requests sent back and forth between the Vendor Portal and SyteLine are handled by the SyteLine Application Event System. Some events use workflow event handlers and require subscription to a publication. Other events fire automatically based on a trigger in the system. In order to fully use the event system, you must activate the necessary workflow event handlers and subscribe users to appropriate publications, as described in the following topics.

Activate Workflow Event Handlers

Default versions of the event handlers, with predefined subject lines and messages, are already set up and can be used as-is. You must activate the appropriate handlers in all sites.

1. On the **Workflow Event Handler Activation** form, filter the form to show only event handlers where the **Application** field is set to **SyteLine Vendor Portal**. Currently, these event handlers are available:
   - Alert on Item Price Request Creation
   - Alert on Item Price Response Creation
   - Alert SyteLine Users of Vendor Interaction
   - Alert Users of a New Vendor Document
   - Alert Users of a New Vendor Portal Document
   - Alert Vendor Portal Users of New Interaction
   - Alert When Price Response is Accepted
   - Approve Vendor Portal Address Change
   - Approve Vendor Portal Company General Change
   - Approve Vendor Portal Contact Change
   - Notify Portal Contract Price Created
   - Notify Portal Contract Price Rejected
   - Notify Portal PO Requisition Line Approval/Rejection
   - Notify Vendor Portal PO Line Promise Date Change
2. For each of these event handlers, select the **Active for This Site** check box.
3. Optionally, you can also choose to customize the information that is sent in the notifications. Refer to the SyteLine online help about workflow event handlers.

Subscribe Users to Portal-Related Publications

In order for users to receive notifications for various portal events, they must be subscribed to the appropriate publications in all sites. These predefined Vendor Portal publications can send notifications to subscribed users:

- ItemPriceRequestAlert
- ItemPriceResponseAlert
- ItemPriceResponseAcceptedAlert

- SLVendorInteractionAlert
- VendorDocumentUploadAlert
- VPConsignedInvConsumptionAlert
- VPConsignedInvLevelAlert
- VPCustomerInteractionAlert

Use the **Publication Subscribers** form to subscribe appropriate SyteLine or portal users to publications. Refer to the summary on the next page for more information.

NOTE: On the portal My Profile page, all portal users can select check boxes to subscribe to the VPConsignedInvConsumptionAlert, VPConsignedInvLevelAlert, VendorDocumentUploadAlert, VPCustomerInteractionAlert, and/or ItemPriceRequestAlert publications. When a portal user selects a check box on the Account Management page, that user is automatically added to the **Publication Subscribers** form as a subscriber to the publication in all relevant sites. No setup is needed on your part. If a portal user clears a check box on the Account Management page, that user is removed from the **Publication Subscribers** form.

Summary of Event Setup

For user to get notification of:	Activate this workflow event handler in all sites:	Subscribe user to this publication in all sites:	Subscription can be set for:
New item price requests	Alert on Item Price Request Creation	ItemPriceRequestAlert	Portal users*
New item price responses	Alert on Item Price Response Creation	ItemPriceResponseAlert	SyteLine users
Acceptance of item price responses	Alert When Price Response is Accepted	ItemPriceResponseAcceptedAlert	Portal users
Interactions from the customer	Alert Vendor Portal Users of New Interaction	VPCustomernteractionAlert	Portal users*
Interactions from portal users	Alert SyteLine Users of Vendor Interaction	SLVendorInteractionAlert	SyteLine users
New vendor documents added in SyteLine	Alert Users of a New Vendor Document	VendorDocumentUploadAlert	SyteLine and portal users*
New vendor documents added on the portal	Alert Users of a New Vendor Portal Document	VendorDocumentUploadAlert	SyteLine users
Address change requests from the portal	Approve Vendor Portal Address Change	N/A**	N/A
General information change requests from the portal	Approve Vendor Portal Company General Change	N/A**	N/A
Contact change requests from the portal	Approve Vendor Portal Contact Change	N/A**	N/A
Contract price requests from the portal. Also notifies portal users when their request is received.	Notify Portal Contract Price Created	N/A***	N/A
Rejected (deleted) contract price requests	Notify Portal Contract Price Rejected	N/A***	N/A
Approved or rejected PO requisition lines	Notify Portal PO Requisition Line Approval/Rejection	N/A***	N/A
Changes to PO line promise dates on the portal. Also notifies portal users when their change request is received and whether it is approved or rejected.	Notify Vendor Portal PO Line Promise Date Change	N/A***	N/A
Quantity on hand of a vendor consigned item has been reduced through consumption or return	N/A†	VPConsignedInvConsumptionAlert	Portal users*
Consigned inventory has gone above or below the limit	N/A†	VPConsignedInvLevelAlert	Portal users*

* Portal users can subscribe or unsubscribe using a check box on the portal Account Management page.

** No publication is associated with these event handlers. Stored procedures and/or global constants are used to send messages for some event handlers. Also, these event handlers prompt for a Yes/No response to approve the change. Based on the response, an approval or rejection notification is sent to portal users if **Send External Notifications** is set for them and an e-mail address is provided on the **Users** form.

*** No publication is associated with these event handlers. Notification is sent to portal users if **Send External Notifications** is set for them and an e-mail address is provided on the **Users** form.

† No event handler is associated with these publications. Stored procedures and/or global constants are used to send messages for some publications.

Assigning Users to Event Global Constants

Several notifications sent from Vendor Portal to SyteLine are handled by SyteLine event global constants. You must add user IDs to these global constants for the users in SyteLine who should receive notifications from the portal.

1. On the **Event Global Constants** form, filter the form to show only portal-related global constants. For example, specify **portal*** in the **Name** field and then click the filter icon.
2. For each global constant, specify one or more user IDs in the **Value** field for each SyteLine user who should receive notifications from the portal. Separate user IDs with semi-colons (;) and no spaces.

   These are the Vendor Portal global constants and the notifications they control:

   - PortalPOLineCreatedManagerID: Sends notification to SyteLine users when a PO line is created using the Planned Orders page in Vendor Portal.
   - PortalPOLinePromiseDateChanged: Sends notification to SyteLine users when a PO line promise date is changed using the Purchase Orders page in Vendor Portal.
   - PortalPORequisitionCreatedManagerID: Sends notification to SyteLine users when a PO requisition is created using the Planned Orders page in Vendor Portal.
   - PortalVendorContractPriceCreatedManagerID: Sends notification to SyteLine users when a price break request has been created using the Product Price Contracts page in Vendor Portal.

Setting Up and Managing SyteLine User Accounts for the Portal(s)

7

Although portal users never see SyteLine forms, they do access SyteLine data through IDOs and so they must have a user account in SyteLine, with the appropriate licensing and permissions. The portal user logs in through SharePoint using this SyteLine user name and password.

In past versions of the portals, steps for setting up these user accounts were all manual and involved multiple SyteLine forms. Beginning with SyteLine 9.0, a User Account Management Utility is provided in each of the portals to streamline the process of creating SyteLine user accounts for portal users. The utility is especially helpful for multi-site implementations, because it automatically creates many of the records needed for user accounts across sites.

You may still prefer to set up some user accounts manually, and steps for doing so are included in this chapter. However, we recommend that you use the User Account Management Utility for most user setup and management.

These topics are provided:

NOTE: The information in this chapter explains creating new portal logins for your external customers and vendors. It assumes that you have not already set up logins for them to another SharePoint site. If you do have existing logins to a SharePoint site, you may be able to use them with our portals, rather than creating all new ones. Contact Infor Professional Services for help.

Setting Up SyteLine Accounts for Portal Users

This section describes requirements for setting up SyteLine accounts for portal users.

Required SyteLine Records

In order to set up a SyteLine user account for a portal user, either manually or with the User Account Management Utility, certain records must already exist in SyteLine.

- For creating Customer Portal user accounts, the Customer record (on the **Customers** form) with which the portal user's account is to be associated must exist in all sites.
- For creating Vendor Portal user accounts, the Vendor record (on the **Vendors** form) with which the user account is to be associated must exist in the Primary Site.
- For creating Reseller Portal user accounts, the Customer and Reseller's Salesperson records (on the **Customers** form) must exist in all sites. The Salesperson (on the **Salespersons** form), Commissions (on the **Commission Table** form), and Vendor (on the **Vendors** form) records with which the user account is to be associated must exist in the Primary Site.
- For creating Customer Portal user accounts that reference a reseller, the Customer record (on the **Customers** form) must exist in all sites. Also, the associated reseller records must exist in all sites prior to creating new reseller customer accounts.

Tasks for creating these required records for each portal are explained in the "Setting Up SyteLine"chapters of this guide.

Multi-Site Considerations

In multi-site implementations, you can use the User Account Management Utility to copy required records from the Primary Site to all other sites in your portal site groups. The process is described in "Copying Portal User Accounts with the User Account Management Utility" on page 104. The following rules apply:

Customer Portal

- A customer ID must represent the same customer across all sites in the Customer Portal site group.

Reseller Portal

- A customer can be associated with only one reseller across all sites in the Customer Portal site group.
- A customer is either associated or not associated with a reseller. This must be true across all sites and ship-to records.
- A reseller customer must use the same reseller salesperson ID across sites.
- Salesperson IDs used for reseller association must reference the same vendor ID across sites.

Vendor Portal

- A vendor ID must represent the same vendor across all sites in the Vendor Portal site group.

Exceptions for Customer Portal User Accounts

For all three portals, you can set up user accounts manually or with the utility after required customer, reseller, and vendor records are created. For Customer Portal, there are additional ways for users to be added:

- Existing users for whom you have set the **Can Create Users** permission on the **Customer Users** form can add new users to their own customer account from the Customer Portal Account Management page. All the necessary records are created in SyteLine.
- New business-to-consumer (B2C) customers can register their own user accounts from Customer Portal before submitting an order. All the necessary records are created in SyteLine. If these customers received a portal redirect link from a reseller, then when they register, their accounts are automatically associated with the reseller. An alert is published for SyteLine and Reseller Portal subscribers to NewCustomerCreatedAlert, to let them know a customer record has been created.
- Resellers for whom you have set the **Can Create Users** permission on the **Customer Users** form can register new customers from the Reseller Portal Account Management page and Customers page. All the necessary records are created in SyteLine, and these customers are automatically associated with the reseller who adds them. Again, the alert is published for SyteLine and Reseller Portal subscribers.

  For more information about adding customers for a reseller, see “Adding Customers for a Reseller” on page 82 and “Associating Existing Customers to a Reseller” on page 82.

Adding User Accounts Manually

In the event that you need to set up SyteLine user accounts manually for Customer, Reseller, or Vendor portal users, this section describes the required tasks.

If you have a multi-site implementation, all user account records must be created in all sites.

Create SyteLine User Records

1. On the **Users** form, create a new user record. The record must include:
   - **User ID**
   - **Password**
   - **Super User**: This option must *not* be selected. This user cannot be a super user.
   - **User Modules**: Add the appropriate portal license module, either SyteLinePortals or SyteLinePortals_MS. Refer to the *Infor SyteLine Licensing Guide* for important details
   - On the Groups tab, do one of the following:
     - For a Customer Portal or Reseller Portal user, select the Customer Portal group from the drop-down list.
     - For a Vendor Portal user, select the Vendor Portal group from the drop-down list.

NOTE: If the portal user is both a vendor and customer, the user can be assigned to both groups.

- On the E-Mail Address tab, specify the **Primary E-mail Address** and select **Send External Notifications** if you want the user to receive e-mail confirmation of their actions on the portal.

  These settings also can be controlled by the **E-mail Address** and **Confirmation** settings the user makes on the portal Account Management page. However, if you do set the **Primary E-mail Address** here in SyteLine, you should also select **Send External Notifications** in SyteLine rather than waiting for it to be set on the portal.

  Also, in order to support the use of **Send External Notifications**, the **Forms Database Name** field on the SyteLine **Sites/Entities** form must be set to a default forms database name from which to retrieve translated strings for messages sent from and within each application database. Refer to the SyteLine online help for more information.

Add the User to the Necessary User List

Row-level authorizations (IDO filters) are already set up that limit the access portal users have to SyteLine. The filters expect each Customer or Reseller Portal user to be associated with only one customer number and each Vendor Portal user to be associated with only one vendor number.

Do one of the following:

- For a Customer Portal or Reseller Portal user, on the **Customer Users** form, specify the customer number associated with the portal user and the SyteLine user name (user ID) that you gave the portal user.
- For a Vendor Portal user, on the **Vendor Users** form, specify the vendor number associated with the portal user and the SyteLine user ID that you assigned to the portal user.

Set "Can Create Users" (Optional)

This task is for only Customer Portal or Reseller Portal user accounts.

On the **Customer Users** form, the **Can Create Users** setting controls an option for adding new users from the portal. This option can be provided to customer or reseller users; however, only customer users can be added from the portal.

The **Can Create Users** setting also controls an option to register new customers from the portal. This option can be provided to only reseller users.

The difference between creating new users and registering new customers is that new users are associated with an *existing* customer record in SyteLine, and registering a new customer creates a *new* customer record in SyteLine.

To give customer users the ability to add users, select this option.

To give reseller users the ability to add users and register new customer, select this option.

Adding Users: How it Works for Customers

If this setting is selected for a Customer Portal user, the **Add a New User** button and **User** drop-down list are displayed at all times on that user's Account Management page in the portal.

The customer can click the button to open the **Create User Account** form, where new user information is entered. Once submitted, new records are created in SyteLine, in all sites of the portal site group, on the **Users** and **Customer Users** forms. The new user is automatically associated with the customer record of the customer who created the user.

An alert is published for subscribers to the NewCustomerCreatedAlert to let them know an account has been created in SyteLine.

The customer who created the user must communicate the user ID, password, and portal URL to the new user, and then that user can access the portal.

The customer can edit or inactivate any new user account he or she created by selecting it in the **User** list on the Account Management page and then using the options provided.

Adding Users: How it Works for Resellers

If this setting is selected for a Reseller Portal user, the reseller must first choose a company from the **Customer** list on the Account Management page and then click **Filter**. The **Add a New User** button and **User** list are displayed.

When the reseller enters and submits new user information, new records are created in SyteLine, in all sites of the portal site group, on the **Users** and **Customer Users** forms. The new user is automatically associated with the active customer record.

An alert is published for subscribers to the NewCustomerCreatedAlert to let them know an account has been created in SyteLine.

The reseller must communicate the user ID, password, and portal URL to the new user, and then that user can access the portal.

The reseller can edit or inactivate any new user account he or she created by first selecting the associated customer and then the user on the Account Management page.

Registering New Customers

When you select the **Can Create Users** setting for any Reseller Portal user, the **Register a New Customer** button is automatically included on that reseller's Account Management page and Customers page in the portal.

The reseller can click the button to open the **Register a New Customer** form, where new customer information is entered. Once submitted, new records are created in SyteLine, in all sites of the portal site group, on the **Users** and **Customer Users** forms.

About the User Account Management Utility

The SyteLine Portals User Account Management Utility automates many parts of user account setup and management. This utility is displayed to only users set up as portal administrators (see “Set Up the Portal Administrator User Account” on page 29) and is available in all three portals. It can be used to:

- Create new portal-enabled SyteLine user accounts for one site or across all sites in the portal site group.
- Analyze existing portal-enabled SyteLine user accounts to see if they are set up properly for one site or across all sites in the portal site group.
- Copy portal-enabled user accounts from the Primary Site to all other sites in the portal site group. This applies to only multi-site implementations.

  NOTE: The Copy function can be used to help with user account setup and for fixing problem accounts, across sites. It is not meant for copying a single valid account to use as a template for creating a new account.

For Customer Portal or Reseller Portal users, the utility assigns or validates accounts in the Customer Portal group. For Vendor Portal users, the utility assigns or validates accounts in the Vendor Portal group.

You must ensure that the utility is used by only one session per portal at a time.

Creating Portal User Accounts with the User Account Management Utility

Use the following procedure to create SyteLine portal-enabled user accounts using the User Account Management Utility.

1. Log in to the appropriate portal with your portal administrator credentials. The User Account Management Utility page is displayed.
2. In the User Account Creation section, specify this information:
   - **Account Type**: This field is enabled for use in only Customer and Reseller portals, so you can specify whether to create a customer or reseller portal user account.
   - **User ID**: Specify the user ID that the user must enter to log in to the portal.
   - **Password**: Specify the password the user must enter to log in to the portal.
   - **Retype Password**: Type the password again for confirmation.
   - **Nam**e: Specify the user’s first and last name.
   - **E-mail**: Specify the user’s primary e-mail address. Any messages coming from the portal will be sent to this address.
   - **Customer** or **Vendor**: **Customer** is enabled for use in only Customer and Reseller portals. Specify the customer ID to be associated with this portal user account. **Vendor** is enabled for use in only the Vendor Portal. Specify the vendor ID to be associated with this portal user account.

- **Salesperson**: This field is enabled for use in only Customer and Reseller portals. When the account type is Customer, specify the Salesperson ID of the reseller who is to get credit for sales to this customer. When the account type is Reseller, specify the reseller's Salesperson ID.
- **Vendor**: This field is enabled for use in only Customer and Reseller portals when the account type is Reseller. Specify the reseller's vendor ID.
- **Reseller Commission**: This field is enabled for use in only Customer and Reseller portals when the account type is Reseller. Specify the commission percentage the reseller is to receive from purchases made by associated customers.

3. To automatically send the user an e-mail message containing their user ID, password, and portal URL, select **Notify User**. This step is optional.
4. Click **Create**. This portal user account is created in all sites in the portal site group.

Analyzing Portal User Accounts with the User Account Management Utility

This task describes analyzing portal-enabled user accounts after they have been added in SyteLine, either manually or using the utility.

In the User Account Analysis and Copy section, do one of the following:

- To analyze all user accounts, leave the User ID field blank and click **Analyze**.
- To analyze a specific user account, specify the user ID and then click **Analyze**.

  Color-coded results are displayed.

  Red means the issue must be fixed before the user can access the portal.

  Yellow means the issue does not prevent the user from accessing the portal, but it may cause undesirable results.

  Green means the account is set up properly and is ready for accessing the portal.

  To fix a problem account, you may be able to copy an existing account from the Primary Site, as described in the next topic. If the problem is with an account in the Primary Site, you must fix that account manually.

NOTE: Once you analyze accounts, the results are stored and shown in the grid every time you log in to the utility. To purge old records, you must run Analyze again.

Copying Portal User Accounts with the User Account Management Utility

This task describes copying all valid portal user accounts from the Primary Site to all other sites in the portal site group. Accounts can be copied to help with user account setup or to fix a problem account in a site other than the Primary Site.

To copy portal user accounts, the following SyteLine conditions must be met:

- For Customer Portal user accounts, the Customer record (on the **Customers** form) must exist in all sites and the Customer User record (on the **Customer Users** form) must exist in the Primary Site.
- For Vendor Portal user accounts, the Vendor record (on the **Vendors** form) and Vendor User record (on the **Vendor Users** form) must exist in the Primary Site.
- For Reseller Portal user accounts, the Customer and Reseller's Salesperson records (on the **Customers** form) must exist in all sites. The Customer User (on the **Customer Users** form), Salesperson (on the **Salespersons** form), Commissions (on the **Commission Table** form), and Vendor (on the **Vendors** form) records must exist in the Primary Site.
- For Customer Portal user accounts that reference a reseller, the Customer record (on the **Customers** form) must exist in all sites. Also, the associated reseller records must exist in all sites prior to creating new reseller customer accounts.
- For all portals, the User Name, User E-mail, and User Group records (on the **Users** form) must exist in the Primary Site.

To copy accounts, first run Analyze to make sure you have current records. Then in the User Account Analysis and Copy section, do one of the following:

- To copy all user accounts that have been set up in the Primary Site, click **Copy all accounts from Primary Site to all sites**. This option is next to the user account condition summary. This process can take some time if there are many accounts to copy.
- To copy a single user account, find the account in the user grid section and then click **Copy Account from Primary Site to All Sites** for that account.

If errors occur after copying an account, you will need to verify the original account and set up the new account manually. See "Adding User Accounts Manually" on page 99.

Managing Portal Content

8

The content management function of the Portal Manager provides an efficient method for backing up and transferring portal content.

Backups are needed for simple content changes, such as the basic personalizations described in this guide, and also for advanced customizations like those explained in the *Infor Portals Customization Guide*.

Backups are made by using Portal Manager to export SharePoint content to a target folder on your local hard drive. If you need to restore backup content, you can use Portal Manager to import it back into SharePoint.

You also can transfer reusable content from one SharePoint portal to another. For example, when you personalize the portal in a test environment, you can transfer the completed content to your production portal. Also, if you use both the Customer and Vendor portals, you could modify the login page in one portal and then transfer that page to also be used in the other, rather than making the same changes in both portals. If you add a new page, you can create the page in one portal and transfer it to the other.

This chapter explains how to use the Portal Manager to export, import, and transfer content. These topics are provided:

Exporting Modified Portal Content

When you modify portal components, they are locked in Portal Manager and cannot be edited by other users. To unlock and back up the components, you must export them.

NOTE: When you lock a component using Portal Manager, the corresponding file is also locked in SharePoint. When you export the component using Portal Manager, the file is unlocked in SharePoint. If you edit a file in SharePoint, then after saving your changes, the file is locked. You must export the component using Portal Manager in order to retain the latest version in your backup location. This applies to components in the IPF

Installed Site Pages, IPF Installed Site Assets, and IPF Installed Help Assets lists in SharePoint.

To export modified portal content:

1. Open the Portal Manager and connect to the site from which to export content.
2. Select **Content Management > Enable Version Control** to start version control.
3. Select **Content Management > Export**. All folders are displayed, but only your locked components are included in them.

   To see components locked by all users, select **Show All Locked Components**. You can export these too, if you have the appropriate permissions in SharePoint.
4. Select the check box next to each type of content to back up. You can expand the folders to select individual components.
5. Select **Export files to Folder for check-in**.
6. Specify the target folder to which to export the content. This is the root folder of where you will store modified portal content, for example `C:\SyteLine Portals`. Even if you have selected only one component to export, you should specify the root folder. Otherwise the entire folder structure will be built again inside of any other folder you select.
7. Click **Export**. A summary form is displayed, showing the content you have chosen to export. You have these options:
   - To save the summary information to a file, right-click the form and then select **Save to File**.
   - To change your selections, click **Cancel** and make your selections again.
   - To start the process, click **Start**. Your content is exported to the backup folder. You can see export progress on the progress bar and status in the log display at the bottom of the form. If you need to cancel the process, click **Cancel** on the progress bar.
8. If you use a version control system, you can check in the exported content.

Generating a CRC File

To make sure components have not been changed manually, you can have a CRC file generated each time you export content using Portal Manager.

To generate the CRC file, select **Content Management > Generate CRC File**. Now, each time you export components, a CRC file is created for each one and added in the same location. When you import content, if a CRC file exists, it is checked to see if the component has been changed manually.

Importing Portal Content

To import content using Portal Manager:

1. Open the Portal Manager and connect to the site to which to import content.
2. Select **Content Management > Import**.
3. Specify the folder from which to import (this is the root folder to which you exported portal content). You can also select to import a single component.
4. Select the check box next to each type of content to import. You can expand the folders to select individual components.
5. Click **Import**. A summary form is displayed, showing the content you have chosen to import. You have these options:
   - To save the summary information to a file, right-click the form and then select **Save to File**.
   - To change your selections, click **Cancel** and make your selections again.
   - To start the process, click **Start**. Your content is imported into SharePoint. Existing content is overwritten, unless it is the same or an older version. Then it is skipped. You can see import progress on the progress bar and status in the log display at the bottom of the form. If you need to cancel the process, click **Cancel** on the progress bar.

Transferring Portal Content

To transfer content from one portal to another:

1. Open Portal Manager and connect to the site from which to transfer content.
2. Select **Content Management > Transfer**.
3. Select the check box next to each type of content to transfer. You can expand the folders to select individual components.

   NOTE: If you select components that are locked in Portal Manager, the previous unlocked version is transferred, unless none is found. Then the component is skipped.
4. Specify and connect to the portal to which to transfer the content.
5. Click **Transfer**. A summary form is displayed, showing the content you have chosen to transfer. You have these options:
   - To save the summary information to a file, right-click the form and then select **Save to File**.
   - To change your selections, click **Cancel** and make your selections again.
   - To start the process, click **Start**. Your content is copied from the source portal to the target portal. Existing content is overwritten, unless it is the same or an older version. Then it is skipped. You can see transfer progress on the progress bar and status in the log display at the bottom of the form. If you need to cancel the process, click **Cancel** on the progress bar.

Clearing or Saving the Log Display

The Portal Manager log display collects data continuously as you export, import, and transfer portal content.

To save logged data to a file, right-click the log display area and select **Save As**.

To locate the log file, right-click the log display area and select **Locate Log File**.

To clear the log display, right-click the log display area and select **Clear**.

Personalizing the Portal(s)

9

This chapter provides steps for personalizing the portal(s) with your own company logo, pictures, text, and more.

Step	Description	See Page
1	Set SharePoint design permissions for users who will personalize the portal.	109
2	Enable the portal for development.	110
3	Learn about the Home page layout.	111
4	Change the sample company logo.	112
5	Change the sample Home page pictures.	112
6	Change the sample Home page text.	113
7	Enable bottom menu links (optional).	114
8	Change the portal color scheme (optional).	115
9	Hide menu options (optional).	116
10	Update or hide online help topics (optional).	116
11	Back up personalized components.	120

You can perform basic personalizations as needed. Most changes are made in the Portal Manager and its Layout Editor. If you choose to set links to new content for existing menu options, you also will need a version of Microsoft Visual Studio. See Chapter 1, “System Requirements and Prerequisites”.

In order to make personalizations, your account must have Design level permissions in SharePoint.

For information about making more complex changes, refer to the *Infor Portals Customization Guide.*

NOTE: We generally recommend that you make personalizations in an internal test environment and then transfer those modified features to your external portal.

Setting SharePoint Design Permissions

During portal configuration, you set SharePoint Read permissions for all SyteLine user accounts belonging to the Customer Portal and/or Vendor Portal group, so they can see but not change content on your portal(s). Similarly, you must set Design permissions for any user who should be able to modify portal pages.

When users with Design permissions sign in to the external portal Web site, a maintenance (wrench) icon is displayed in the upper left corner of most portal pages. Users can click this icon to enable the SharePoint ribbon for working on portal content.

You can assign Design permissions to individual users in SharePoint, or you can create a special group of users and assign Design permissions to the group. See “Set User Group Permissions in SharePoint” on page 48.

NOTE: Some modal pages in the portal, or new pages added during portal customization, may not include the maintenance icon even if you have Design permissions. This can happen if the page doesn’t include the ToggleAdmin Web Part or field display format. In these cases, you can still access the SharePoint ribbon by adding this to your page URL: `?IPFDisplayRibbon=1`. For example: `<SharePoint Server Name>:8084/IPFSitePages/NewPage.aspx?IPFDisplayRibbon=1`. Refer to the *Infor Portals Customization Guide* for more information.

Enabling a Portal for Development

Before you can make personalizations, you must enable the portal for development. Follow these steps:

1. Open Portal Manager and connect to the site to work with.
2. Select **Configuration > General**.
3. Click **Enable Portal for Development**.
4. On the dialog box that opens, specify this information:
   - Originator: This originator indicates the organization, product, or project that created the component. In most cases, you will specify your company name as the originator for components you add or personalize in the portals.
   - Feature Name: Select the feature to personalize. The Default feature is for content that is available to all portal users.
   - Priority: The priority is set to 30 by default. Because the SL 9.00 and IPF 3.1 originators were set to priorities of 20 and 10 during portal configuration, this new originator is now set at the highest priority, so only components of this originator are edited.
5. Click **OK**.
6. Back on the General tab, click **Apply**. The selected portal is ready for development and the specified feature and originator are automatically activated.

Additional information about activating custom portal content is provided in the *Infor Portals Customization Guide*.

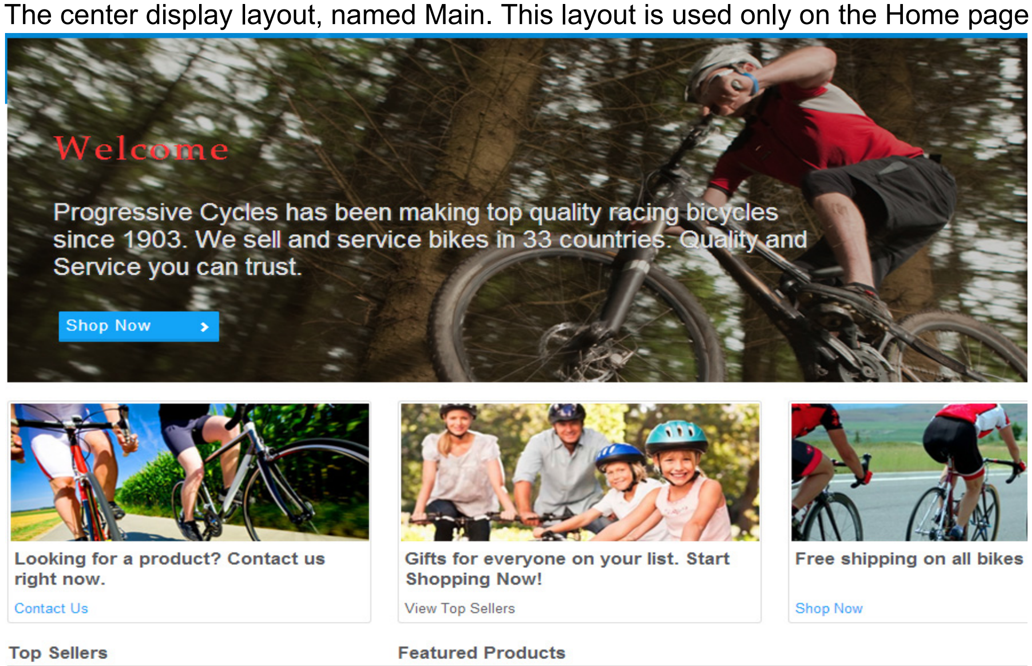
Understanding the Home Page Layout

The Home page for SyteLine portals is made up of these editable parts:

- The header display layout, named MasterTopHeader_MenuBar. This display layout is included on a portal master page, so any changes you make are applied to all portal pages that use this master page.

- The footer display layout, named MasterBottomHeader_FooterMain. This display layout is also included on a portal master page, so any changes you make are applied to all pages that use this master page.

- The center display layout, named Main. This layout is used only on the Home page.



NOTE: It is helpful to have the Home page open while you make personalizations, because after you make a change in Portal Manager or the Layout Editor, you can refresh the Home page to see your change immediately.

Changing the Company Logo

The portal is set up with a sample logo that you must replace with your own company logo. The logo file, which is used in the top left corner of the portals, is added to the MasterTopHeader_MenuBar layout and is contained in this SharePoint library: `/IPFSiteAssets/Images`.

The simplest way to change the sample logo is to give your company logo the same file name, which is DemoTitleBarImg.png, and then add this new file to your portal using Portal Manager.

A field display format of 'ImageSP165x60Click' has been used for the logo file. For best results, we recommend that your logo file be similar in size to 165 x 60 pixels. However the field display format does adequately constrain the proportions of any sized image while maintaining its aspect ratio. For information about images for retina-ready devices, see “Standards for Pictures Used on the Portal” on page 53.

To replace the sample company logo file:

1. Save your company logo file as a .png file to your workstation with the name DemoTitleBarImg.
2. In Portal Manager, select **Content Development > Components**.
3. Expand IPF Installed Site Assets and then expand the Images folder.
4. Open the folder where your own company logo file is saved, and drag that file to the Images folder in Portal Manager. At the bottom of the list of image files, the new file is added in a locked state. (The file is unlocked after you export content, as described in “Exporting Modified Portal Content” on page 105.)
5. Open or refresh your external portal Web site to review the change.

Changing Pictures on the Home Page

The portal is set up with sample Home page marketing images that should be replaced with pictures appropriate for your company. These images files are added to the Main layout and are contained in this SharePoint library: `/IPFSiteAssets/Images`.

The simplest way to change the sample Home page images is to give your images the same file names, which are HomePageMarketingImage1.png, HomePageMarketingImage2, and so on, up to Image6. Then add these new files to your portal using Portal Manager.

A field display format of ImageSP1000x340 pixels has been used for the images 1, 2, and 3, which are revealed one at a time in the center of the Home page. A field display format of ImageSP316x136 pixels has been used for images 4, 5, and 6, which are displayed below the center images. For best results, we recommend that your files be similar in size to these field display formats.

To replace the sample Home page pictures:

1. Save six Home page.png image files to your SharePoint server with the names HomePageMarketingImage1 through HomePageMarketingImage6.
2. In Portal Manager, select **Content Development > Components**.
3. Expand IPF Installed Site Assets and then expand the Images folder.
4. Open the folder where your own images are saved, and drag those files to the Images folder in Portal Manager. At the bottom of the list, the new files are added in a locked state.
5. Open or refresh your external portal Web site to review changes.

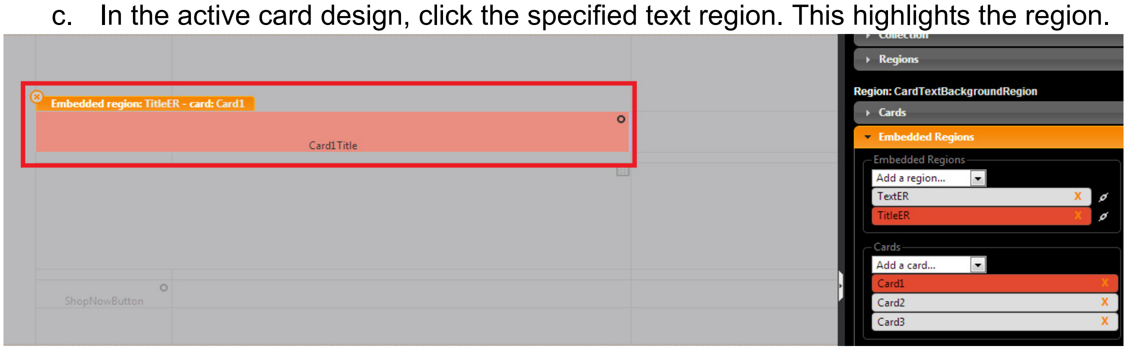
Changing Text on the Home Page

To change text on the Home page, you must edit data in the Main layout.

IMPORTANT: This topic explains how to change the current translatable text strings to literal text that cannot be translated. If you need to use translatable text on your portal(s), do not make the changes specified here. Instead, refer to the *Infor Portals Customization Guide.*

To change text on the Home page:

1. In Portal Manager, select **Content Development > Layouts**.
2. Scroll down and find the Main layout.
3. Right-click in the UI column for that row and select **Edit Layout UI**. This opens a new browser window for the portal Layout Editor and creates a new copy of the layout with your specified originator.
4. In the Layout Editor, you will need to do the following for each text string you want to change. The table below explains further:
   a. In the right pane (layout tools), expand the Regions section and select the region the text is in.
   b. Expand the Embedded Regions section and select the embedded region and card, if applicable. The center of the page shows the card design for the selected region.
   c. In the active card design, click the specified text region. This highlights the region.



   d. In layout tools, expand the Cell section and change the text in the **Data** field.

e. Click the Save icon in the upper right corner to save your changes.

This table shows what to select and edit for all regular text on the Home page:

Home Page Sample Text	Region	Embedded Region	Card	Data String to Change
Welcome	CardTextBackground Region	TitleER	Card1	sWelcome
Fitness-X	CardTextBackground Region	TitleER	Card2	sFitnessX
Cross Country	CardTextBackground Region	TitleER	Card3	sCrossCountry
Progressive Cycles has been making...	CardTextBackground Region	TextER	Card1	sPortalHomePage MarketingText
Our hybrid bicycle for fitness rides...	CardTextBackground Region	TextER	Card2	sPortalHomePage MarketingText2
Designed for strong climbing...	CardTextBackground Region	TextER	Card3	sPortalHomePage MarketingText3
Looking for a product...	Main	ContactUsMarketing ER	N/A	sPortalPromotion ContactUs
Gifts for everyone...	Main	TopSellersMarketing ER	N/A	sPortalPromotion TopSeller
Free shipping on all...	Main	ShopNowMarketing ER	N/A	sPortalPromotion ShopNow

5. Open or refresh your external portal Web site to review changes.

Enabling Links in the Bottom Menu (Optional)

In the bottom menu of all portal pages, there are links for **Privacy Policy**, **Terms of Use**, and **Purchase Terms and Conditions**. The links are included in the MasterBottomHeader_FooterMain layout.

When the portals are first installed, these links do not work, because they need to open content specific to your company. You can enable these options by linking to your own content, either new site pages or existing content. (Instructions for creating a new site page are provided in the *Infor Portals Customization Guide*.)

You may also choose to hide the links, as explained in “Hiding Menu Options (Optional)” on page 116.

To enable the links, you will need a version of Microsoft Visual Studio, so you can edit the script for these links. See Chapter 1, “System Requirements and Prerequisites”.

To enable a menu link:

1. In Portal Manager, select **Content Development > Layouts**.
2. Scroll down and find the MasterBottomHeader_FooterMain layout.
3. Right-click in the UI column for that row and select **Edit Layout UI**. This opens a new browser window for the portal Layout Editor and creates a new copy of the layout with your specified originator.
4. In the active card design in the center of the page, click the cell for the link to enable. For example, click the TermsOfUseLabel cell.
5. In the right pane (layout tools), expand the Cell section.
6. Under Style, in the **Field display format** field, select TextClick and then save your change. This makes the link clickable.
7. In Portal Manager, right-click the Server Script column for this layout and select **Edit Server Script**. This opens the script in Visual Studio.
8. Locate the OnLayoutInitialized event and add a line at the end to associate the selected clickable link with your content.

   In the following example, we have associated the link with the Infor.com URL. You can add a URL or a new site page if one has been created. Review the existing entries to see how to complete your new entry.

```
Public Sub OnLayoutInitialized(ByVal context As GridLayoutInitializedContextI, ByVal parms As GridLayoutInitializedParmsI)

    context.UnboundComponents("HomeLabel").NavigateToURLOnClick = context.NavigateToSitePageAsURL("Main.aspx")
    context.UnboundComponents("AllProductsLabel").NavigateToURLOnClick = context.NavigateToSitePageAsURL("Products.aspx")
    context.UnboundComponents("ContactUsLabel").NavigateToURLOnClick = context.NavigateToSitePageAsURL("ContactUs.aspx")
    context.UnboundComponents("VendorHomeLabel").NavigateToURLOnClick = context.NavigateToSitePageAsURL("Main.aspx")
    context.UnboundComponents("VendorContactUsLabel").NavigateToURLOnClick = context.NavigateToSitePageAsURL("VendorContact
    context.UnboundComponents("TermsOfUseLabel").NavigateToURLOnClick = "http://infor.com"
End Sub
```

9. Save your change in the script.
10. Open or refresh your external portal Web site to review the change.

Changing the Portal Colors (Optional)

We provide five different style families you can choose from to change the background, menu icon, and page title colors in your portal.

To change the style family:

1. In Portal Manager, select **Configuration > General**.
2. In the **Default Style Family** field, select a style family.
3. Click **Apply**.
4. Open or refresh your external portal Web site to review the change.

Hiding Menu Options (Optional)

The portal menu bars are included in the top and bottom layouts of the custom master page, so they are displayed on most pages in the portal. You can hide any menu option that you do not want to use in your portal.

The top menu bar provides links in three regions of the MasterTopHeader_MenuBar layout: Menu1A, the Shop menu; Menu2A, the Activity menu; and Menu3A, the Account Menu. The bottom menu bar provides links in the MasterBottomHeader_FooterMain layout.

This example explains how to hide a menu option in the top menu bar. You can follow this example to hide any menu option in either the top or bottom menu bar; however, repositioning of cells may be necessary to hide some links, to avoid creating an empty space. Refer to the *Infor Portals Customization Guide* in these cases.

To hide a top menu option:

1. In Portal Manager, select **Content Development > Layouts**.
2. Scroll down and find the MasterTopHeader_MenuBar layout.
3. Right-click in the UI column for that row and select **Edit Layout UI**. This opens a new browser window for the portal Layout Editor and creates a new copy of the layout with your specified originator.
4. In the right pane (layout tools), expand the Regions section.
5. Select the menu region that contains the link to hide. For example, to hide the Contract Order link, click Menu1A. The center of the page shows the card design for the selected region.
6. In the active card design, click the cell that contains the link to hide.

7. In the layout tools, expand the Cell section.
8. Clear the **Rendered?** check box.
9. Click the Save icon in the upper right corner to save your change.
10. Open or refresh your external portal Web site to review the change.

Updating or Hiding Online Help (Optional)

Help topics for portal pages and components on pages are optional. If there is a help file linked to a page or component, the help icon (?) is displayed on the page. If there is no help file linked to the page or component, the help icon is not displayed.

There is also a Help link in the bottom menu of each page, which displays a help contents page. If you choose not to provide online help, this link must be hidden. If you add topics to the help set, you can also update the help contents page.

Infor has provided help topics, in English with a 1033 locale value, that you can use as-is, remove, or personalize. You also may want to provide translated help topics for your portal's supported locales. We suggest that you match our standard naming convention for your help files, and place the source topics in folders by locale, so they are easy to find and update.

Modifying Help Topics

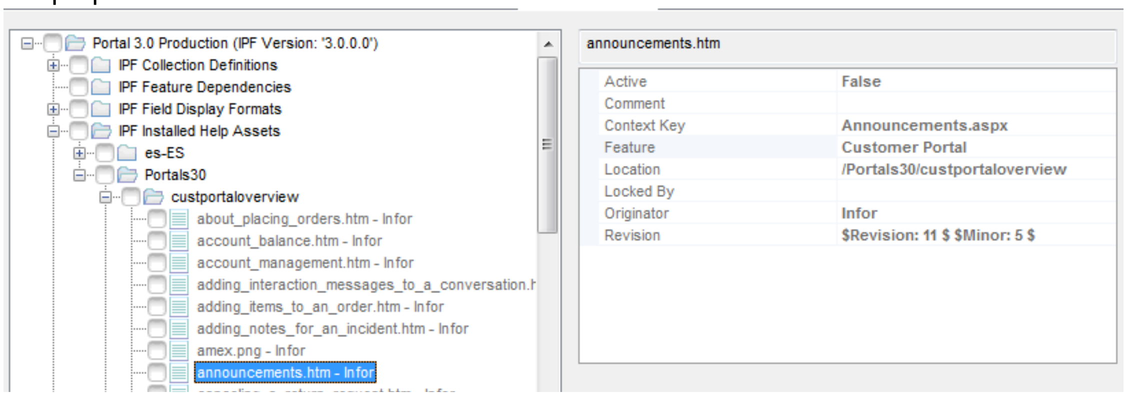
In the event that you make a change to any of the existing portal pages, you may need to update the provided online help topic(s). For example, if you hide the Contract Orders link in the Shop menu, then you would need to change any help topics that refer to that page or that provide a hypertext cross-reference to the page topic.

You can use most HTML editors or Notepad to modify help topics. Do not use Microsoft Word to edit the files.

To modify an existing help topic:

1. In Portal Manager, select **Content Development > Components**.
2. In the components tree, find the help file to modify by expanding IPF Installed Help Assets > Portals30 > <help collection (custportaloverview, vendportaloverview, or resellerportaloverview)>. Click the desired topic from that collection and drag it to your desktop or another location on your workstation.
3. Right-click the file and select **Open with**. Choose your HTML editor or Notepad. Do not open with Microsoft Word.
4. Edit the topic as needed and save your changes. Do not change the file name.
5. Drag the file back to its collection in Portal Manager, and click **Yes** when prompted to overwrite the existing version. A copy of the file with your specified originator is added in a locked state.

6. Next you must add the Context Key, if applicable, and Feature name properties for this new file. The best way to determine what to add is to check the properties grid for the original help file. For example, if you have modified the Announcements.htm help topic in the custportaloverview help collection, then you should click the original file to see its properties.



In this example, the properties are:

- Context Key = Announcements.aspx. This maps the help topic to the appropriate portal page and causes the help (?) icon to be displayed on that page. Not all help topics are mapped to a portal page, so this field is not required.
- Feature = Customer Portal. This specifies the portal to which the help topic applies. This field is required.

To edit the properties for your new file:

a. Select your new file in the list.
b. Click the Edit (pencil) icon.
c. Specify the Context Key and/or Feature.
d. Click the Save icon.

7. To review the change, open or refresh your external portal Web site, go to the page for which you have added a modified help topic, and click the help icon in the upper right corner.

Hiding Help Topics

If you do not wish to provide help topics for certain pages of your portal, you can hide all links to the topics so users cannot access the content. This includes removing the Context Key, if one is provided, and removing hypertext links in any of the other help topics. You will need to carefully review all help topics in a collection to find hypertext links that may need to be removed.

Follow the steps in "Modifying Help Topics" on page 117 to remove hypertext links and add your edited files.

To remove the Context Key from a help topic file:

1. In Portal Manager, select **Content Development > Components**.
2. Expand IPF Installed Help Assets and select the help file to work with.
3. Next to the properties grid, click the Edit icon.

4. Remove the Context Key entry.
5. Click the Save icon. A copy of the file with your specified originator is added in a locked state.
6. To review the change, open or refresh your external portal Web site and go to the page whose topic no longer has a Context Key. Make sure there is no help icon in the upper right corner.

Adding a Help Collection for a Different Locale

If you do not provide a translated help collection for a locale, then when portal users click the help icon, they will see the help for the default locale (usually English). To add a help collection for a different locale, follow these steps:

1. Name the folder that contains your translated .htm files. Your folder name must match the existing help folder name:

Portal	Folder Name
Customer Portal	custportaloverview
Vendor Portal	vendportaloverview
Reseller Portal	resellerportaloverview

2. In Portal Manager, select **Content Development > Components**.
3. In the components tree, expand IPF Installed Help Assets.
4. Click and drag your help collection folder and drop it under IPF Installed Help Assets. The New Help Assets window is displayed.
5. Specify this information:
   a. **Locale**: Specify the locale for your help collection. (This locale must also be selected during portal configuration, so it can be provided as an option in the language field on your portal.)
   b. **Product Name**: Specify Portals30. This name must match the existing help product name.
   c. Click **OK**. The new help collection is added.
6. Next you must add the Context Key, if applicable, and Feature name properties for all help files in the collection. The best way to determine what to add is to check the properties grid for the help files in the original Portals30 help collections. Refer to step 6 in "Modifying Help Topics" on page 117 for details.
7. Add a style sheet file to the Portals30 folder in your translated collection. You can copy the existing style sheet or add your own.
8. To test your new help collection, open or refresh your external portal Web site and in the bottom menu, select the applicable language. Next, click the help icon in the upper right corner to see the help topic in the selected language.

Backing Up Your Personalized Components

At any point during the process of personalizing the portal(s), you can export your new components so they are backed up and also unlocked in Portal Manager. For more information, see Chapter 8, “Managing Portal Content”.

Administration Tasks

10

This chapter provides information about SyteLine and SharePoint portal administration tasks that are performed either occasionally or on a regular basis.

Task	Tool to Use	See Page
Provide customers, resellers, and/or vendors with login information.	E-mail or phone	121
Add or update information on the portal (optional).	SharePoint	122
Approve uploaded documents.	SyteLine	125
Check for messages sent from the portal Contact Us page.	E-mail	
Clear the portal cache.	Portal Manager	126
Clear the Portal Manager log.	Portal Manager	126
Use the Communication Wizard to send promotions or announcements to portal subscribers.	SyteLine	126
Push portal configuration changes when you add another server to your SharePoint farm.	SharePoint	127
Reset pre-login permissions when you change authentication data sources or SharePoint user/group permissions.	Portal Manager	127
Change the authentication data source.	Portal Manager and SharePoint	127
Change IIS Site Bindings.	SharePoint	128

Providing Login Information

You will need to provide this information to each new portal user that you create in SyteLine:

- The portal URL
- The browsers and versions that are supported
- The user's login and initial password

Adding or Updating Information on the Portal(s) (Optional)

Using our provided SharePoint libraries and lists, you can add these types of information to the portal:

- Announcements
- FAQ
- Knowledge Base items
- Videos or White Papers
- Press Releases

If you later reinstall the portal over the existing Web application, this information is preserved. If you uninstall the Web application, this information is lost, so you should store backup copies on another computer. There are several ways to back up the data in lists. One simple way is to export the data to Microsoft Excel. You also can use the Portal Manager. See “Exporting Modified Portal Content” on page 105.

Translation

These page names and column headers are translated into different languages based on the portal user’s language selection.

You can translate and add content (the list or library items) in different languages. However, the portal does not mark entries for a particular language or display only items that match the portal user’s selected language. The portal users will see all items in all languages and must find the ones in their language, so we suggest that you specify the language as part of the filename or description.

Known Limitation for Customization

You can add custom data collections to your portal — similar to our White Papers, Videos, FAQs, etc. — using SharePoint lists and libraries. When you create a new list or library, SharePoint does not require that column display names are unique. However, the Infor Portal Foundation (IPF) architecture refers to each column by its display name, so if names are not unique, IPF cannot function correctly. To resolve this issue, you should use unique column display names when you add a new SharePoint list or library to your portal.

Add Announcements

Announcements are displayed on the portal’s Announcements page (`/IPFSitePages/Announcements.aspx`).

To add your announcements to the Announcements list in SharePoint:

1. Using the shortcut on your desktop, open the portal administration site and sign in using Windows authentication. The portal’s Default.aspx page is opened in SharePoint.
2. In the Lists menu, click **Announcements**.
3. Click **Add new item**.

4. On the **Announcements - New Item** form, add the title and text of the announcement. Announcements can contain text, hyperlinks, HTML code, attachments, pictures, and tables.
5. Specify the date. On the portal Announcements page, the list of announcements is sorted by date, with the most recent announcement first.
6. Click **Save**.

The default list layout has Date, Title, and Announcement columns. In SharePoint, you can add, remove, and modify the columns.

If you do not want to use the Announcements page, hide the Announcements link on the Activity menu, as described in “Hiding Menu Options (Optional)” on page 116.

NOTE: Remember to remove out-of-date announcements from the list on the portal administration site.

Add FAQs

To create or add to the list of frequently asked questions that portal users can access:

1. In the Lists menu, click **FAQs**.
2. Click **Add new item**.
3. On the **FAQs - New Item** form, add a title, the question, and the answer. You can format the answer text to include steps, bullets, bold, italics, and so on.
4. Click **Save**.

The questions and answers you add become part of the searchable Knowledge Base.

FAQs can contain text, hyperlinks, HTML code, attachments, pictures, and tables. The default layout has Question and Answer columns. You can add, remove, and modify the columns. The most recently added FAQ is shown at the bottom of the portal FAQs page.

If you do not want to include a link to FAQs, hide the link on the Knowledge Items menu, as described in “Hiding Menu Options (Optional)” on page 116.

Update the Knowledge Base

The portal’s Knowledge Base is a search built over the FAQs and White Papers. The landing page for the Knowledge Base (`/IPFSitePages/Knowledgebase.aspx`) by default contains a search box, a FAQs section, and a White Papers section.

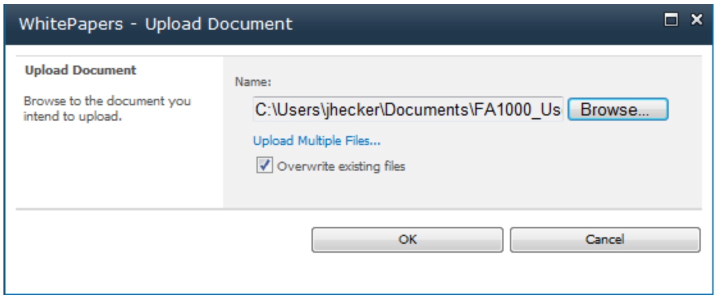
The FAQs and White Papers sections contain the top five entries on the FAQs and White Papers pages. You can change this layout or add other pages to those being searched. Up to 10 results are shown per page.

If you do not want to link to a knowledge base, hide the Knowledge Base link on the Knowledge Items menu, as described in “Hiding Menu Options (Optional)” on page 116.

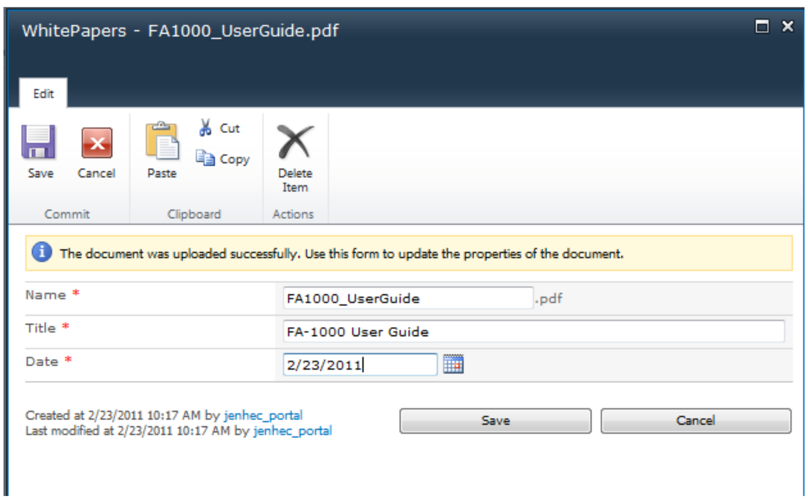
Add to the Video or White Paper Libraries

To add videos or white papers to your portal site, add them to the appropriate libraries in SharePoint.

For example, when you add a white paper, you browse to the location of the file:



Then you specify information to describe it on the portal page:



Supported video types are:

- HTML5 Video: If the data value has a file extension of OGV, the video will be formatted as an Ogg Video. This requires that the client browser supports HTML5 video.
- QuickTime Video: If the data value has a file extension of MOV, the video will be formatted as a QuickTime Video. This requires that the client browser has the Apple QuickTime add-in.
- Flash Video: If the data value has a file extension of SWF, the video will be formatted as a Flash Video. This requires that the client browser has the Adobe Flash Player add-in.
- YouTube Video: If the data value has the extension .youtube, the video will be formatted as a YouTube video. In this case, the contents of the document must be either the YouTube video URL or ID as assigned by YouTube.

Video descriptions can contain text, hyperlinks, HTML code, attachments, pictures, and tables. The default list layout has Name and Description columns. In SharePoint, you can add, remove, and modify the columns. Videos are listed with the newest one first.

White papers can include any file type that is supported by SharePoint. The default list layout has Type, Name, and Date columns. Through SharePoint, you can add, remove, and modify the columns. White papers are listed with the newest one first

If you do not want to include links to videos or white papers, hide the links on the Knowledge Items menu, as described in “Hiding Menu Options (Optional)” on page 116.

Add Press Releases

We created a portal page using a standard SharePoint library for press releases. Add items in the Press Releases page on the portal administration site the same way you add a white paper.

Press releases can contain text, hyperlinks, HTML code, attachments, pictures, and tables. The default list layout has Type, Date, Title, and Overview columns. In SharePoint, you can add, remove, and modify the columns.

If you do not want to include a link to press releases, hide the link on the Knowledge Items menu, as described in “Hiding Menu Options (Optional)” on page 116.

Approving Uploaded Documents

When a document is uploaded on the portal, its status must be changed from Pending to Approved in SyteLine, so it is accessible on the portal.

SyteLine users who are subscribed to the CustomerDocumentUploadAlert publication receive notifications when portal users upload documents, so they know when a document needs approval.

To approve a document that a portal user has uploaded:

1. Open the **Documents** form and select the uploaded document record.
2. Set the status to Approved.
3. Save the record.

Responding to "Contact Us” Requests

When a portal user sends a message from the portal Contact Us page, the message is sent to the company e-mail address listed on the SyteLine **General Parameters** form. You must ensure that someone is monitoring and promptly responding to e-mails sent to that address.

NOTE: For multi-site implementations, if no e-mail address is specified on the **General Parameters** form in the Primary Site, but it is entered on the **General Parameters** form in other sites, then the **Send Questions or Comments** button is not displayed on the Contact Us page; however, the e-mail address present in other sites is displayed on the page.

Clearing the Portal Cache

For better performance, pictures and translated labels are cached in the Web application on the SharePoint server. The first time a label or picture is retrieved, it is added to the cache so that subsequent access to the picture or label is faster.

Cached objects remain on the server indefinitely. If you change a picture or update a label, you must force a reload of the cache so that the change takes effect immediately.

To clear the cache, open Portal Manager, select **Configuration**, and on the General tab, click **Clear Portal Server Farm Cache**.

If the portal Web application is restarted, the cache is cleared automatically. A low memory condition on the server can also cause objects to be cleared from the cache.

Clearing the Portal Manager Log

The Portal Manager log display collects data continuously as portal content is exported, imported, and transferred. You should clear the log occasionally, so it does not use up space unnecessarily.

To clear the log display, open Portal Manager, right-click the log display area, and select **Clear**.

Using the Communication Wizard to Send Promotions/Announcements to Portal Users

To send out a promotion or announcement to all subscribed portal users, use the SyteLine **Communication Wizard** form to quickly set up and distribute the information.

1. On the first page of the wizard, select the Communication Type (New, Promotion or Other).
2. Select **Portal Users** so the communication will be sent to all portal users who have subscribed to this type of publication. This automatically sets the Communication Method to E-mail.
3. On the next page of the wizard, enter the subject and the message to send to portal users. Be aware that there is no special formatting (fonts, emphasis, etc.) allowed in this e-mail.
4. Click **Finish** to send the e-mail.

Pushing Portal Configuration Changes for a New Server in the Farm

If a new server is added to your SharePoint server farm, you must push the portal configuration changes to STS again. This applies the STS configuration to the new server in the farm. To do this manually:

1. Log in to the SharePoint server using the SPFarm user account credentials. (For a SharePoint Standalone installation, see “Set Up User Accounts for SharePoint” on page 25 for log in information.)
2. In SharePoint Central Administration, select **Application Management > Infor Portal Foundation Configuration v3.0.0.0**.
3. Click **Push Config to STS**.
4. Click **OK**.
5. Close the browser window.

Resetting Pre-Login Permissions

When you install an Infor portal, a membership provider named SyteLineMembershipProvider v3.0.0.0 is added in SharePoint. When you configure data sources and push to STS to register the authentication data source, a suffix is added to the membership provider name; for example, v3.0.0.0**s1**. And when you set user or group permissions in SharePoint, they are assigned to the membership provider with the same suffix.

A unique membership provider entry is created in SharePoint for each portal configuration you set up, so for example, if you install and configure portals in a test environment and in a production environment, you will have two membership providers registered with STS.

If you change an authentication data source in Portal Manager and push to STS or if you make changes to user or group permissions assigned in SharePoint, you must then reset pre-login permissions, to keep the configuration’s membership providers in sync.

To reset permissions, select **Configuration > General** in Portal Manager and click the **Reset Pre-Login Permissions** button. More steps for changing the authentication data source are provided in the next topic.

Changing the Authentication Data Source

In the event that you need to change your authentication data source, follow these steps:

1. In Portal Manager select **Configuration > Data Sources**.
2. Select **Authenticator** for the appropriate data source and then click **Apply**. A message to push the change to STS is displayed

3. In the message, click the link to open SharePoint Central Administration, click **Push Config to STS**, click **OK**, and then close the browser window. Back in Portal Manager, click **OK** to close the message box.
4. In the portal administration site, remove and then reset all permissions. See “Set User Group Permissions in SharePoint” on page 48.
5. In Portal Manager, select **Configuration > General**.
6. Click **Reset Pre-Login Permissions**.

Changing IIS Site Bindings

If you change protocol, host name, or port settings that were specified during portal installation, you must use the following procedure to change site bindings for digital certificates.

NOTE: Review the Explanation and Options sections of the following article for more information: `http://blogs.msdn.com/b/russmax/archive/2013/02/27/how-to-properly-change-the-host-header-url-of-a-web-application-in-sharepoint-2010.aspx`

1. In SharePoint Central Administration, select **Application Management > Manage web applications**.
2. Select the Web application to work with.
3. Select **Authentication Providers** and then select the Zone to change, either Default for the administration site or Internet for the production site.
4. Save off the values in:
   - ASP.NET Membership provider name; for example, SyteLineMembershipProvider v3.0.0.0s1
   - ASP.NET Role manager name; for example, SyteLineRoleProvider v3.0.0.0s1

   If you are in the settings for the Internet Zone, also save off the value for **Sign In Page URL**; for example, /_layouts/IPF.Manager_v3.0.0.0/IPFLogin.aspx).
5. Close the Edit Authentication window.
6. With the correct Web application still selected, click the down arrow on the **Delete** button and select **Remove SharePoint from IIS Web Site**.
7. Select the correct zone from the drop-down list and save off the name; for example, Infor Portal - Internet or Infor Portal - Administration.
8. Select **Yes** to delete IIS Web sites and then click **OK**.
9. Back on the Web Applications tab, select the Web application again and then click **Extend**.
10. Select **Create a new IIS web site** and use the name saved in step 7.
11. Specify the new Port and Host Header information. This is the new binding information.
12. If this is the Internet Zone, clear the **Enable Windows Authentication** check box.
13. Select **Enable Forms Based Authentication (FBA)** and enter values saved in step 4.
14. For the Internet Zone, select **Custom Sign In Page** and enter the URL saved in step 4.

15. Specify the Public URL.
16. Select the correct zone, matching the one that was removed.
17. Click **OK**.

Customer Portal Users and Pages Overview

11

This chapter describes the different types of Customer Portal users and explains and shows examples of Customer Portal pages after the portal is set up.

About Customer Portal Users

There can be three types of users of your Customer Portal after it is set up:

- Visitors: Customers who do not register or sign in to the portal can search or browse your catalog, see featured products and top seller lists, review your company contact information, and access announcements and knowledge item pages. They also can add items to the cart and see the Place Order page, but they cannot submit the order online or access any other portal pages.
- Registered B2B users: Customers who have a pre-established account with you, who sign in to the portal after being registered by you, and whose method of payment is On Account are considered to be registered business-to-business users. They may also be able to pay by credit card, depending on how you set them up in SyteLine. They can access all standard Customer Portal pages and functions.
- Registered B2C users: Customers who are registered (either by you or by themselves using the portal), who sign in to the portal, and whose only method of payment is Credit Card are considered to be registered business-to-consumer users. They can access all standard Customer Portal pages and functions, with these exceptions:
  - B2C users cannot add an item to an order on the Place Order page. This feature is referred to as Quick Order, and is provided for only B2B users.
  - B2C users cannot specify a Requested Ship Date on the Place Order page. This feature is provided for only B2B users.
  - B2C users cannot upload documents in the portal.
  - B2C users can check for break prices on qualifying items, but they cannot select items from alternate sites or add items to an order using the Pricing Options form.
  - B2C users do not have access to these pages: Contract Order, Account Balance, Invoices, Estimates, Inventory, or Consigned Inventory.

NOTE: Information about setting up portal users is provided in Chapter 7, “Setting Up and Managing SyteLine User Accounts for the Portal(s)”.

About Customer Portal Pages

The Web pages provided in the Customer Portal are listed in the following table and grouped by function when applicable. A column is provided to indicate which types of users can access each page.

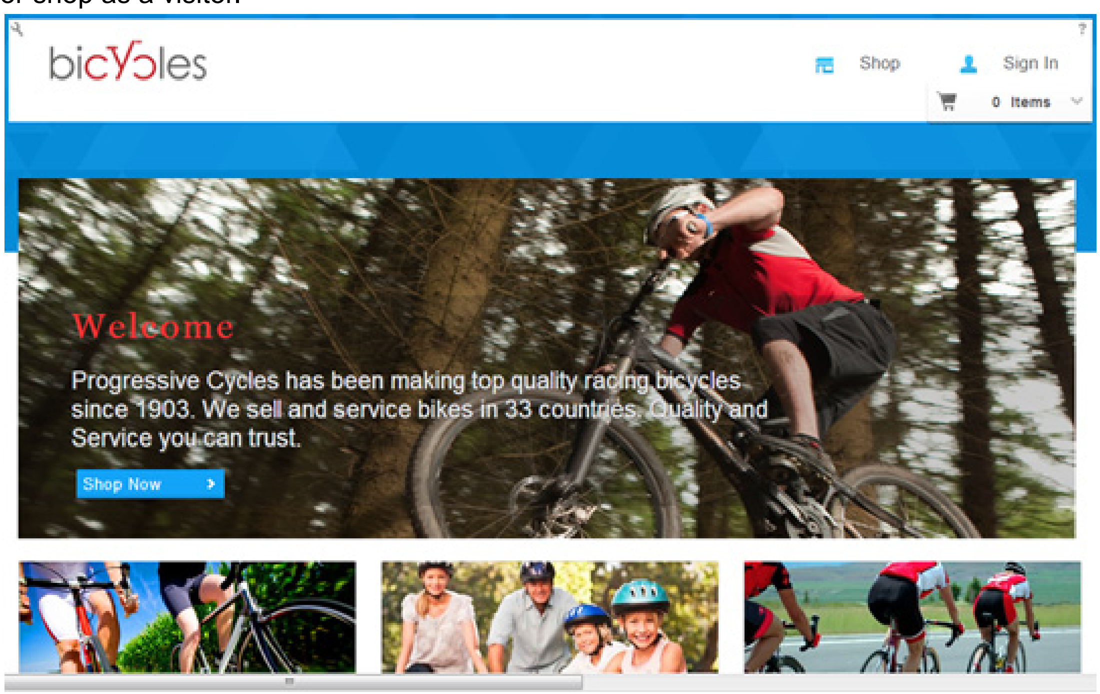
Portal Page	Users Who Have Access	Described on Page
Pre-Login Home page	All	133
Register	All	134
Home page and portal menus	All	134
Pages for Finding Items to Order		
Products	All	137
Top Sellers	All	138
Featured Products	All	138
Pages for Adding Items to an Order		
Products	All	137
Product Details (accessed from item links on other pages)	All	139
Contract Order	B2B	140
Place Order (only B2B users can add items using this page)	All	140
Page for Reviewing and/or Placing the Order		
Place Order	All	140
Activity Pages		
Estimates	B2B and B2C	141
Order Status	B2C and B2B	141
Returns	B2C and B2B	142
Documents	B2C and B2B	142
Interactions	B2C and B2B	143
Announcements	All	143
Account Balance	B2B	144
Invoices	B2B	144
Inventory	B2B	145
Consigned Inventory	B2B	145
Knowledge Item Pages (under Activity menu)		
Press Releases	B2C and B2B	145
Video Library	B2C and B2B	145
Knowledge Base	All	146
White Papers	B2C and B2B	146
FAQ	All	146
Service Pages (under Activity menu)		
Unit Registration	B2C and B2B	146

Portal Page	Users Who Have Access	Described on Page
Service Incidents	B2C and B2B	147
Service Knowledge Base	B2C and B2B	147
Account Pages		
Inbox	B2C and B2B	148
Contact Us	All	148
Account Management	B2C and B2B	149

The remaining sections in this chapter show and briefly describe each portal page. Instructions for using each page are provided as online help topics in the Customer Portal. You can click the help icon in the upper right corner of each portal page to review the instructions. If the content provided isn't suitable for your portal, you can personalize your online help as described in "Updating or Hiding Online Help (Optional)" on page 116.

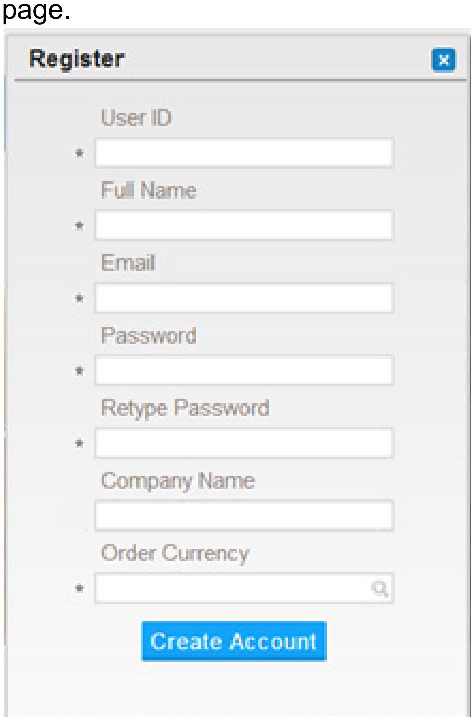
Accessing the Portal

To access the portal, users open their favorite supported browser and enter the portal URL. The portal pre-login Home page is displayed, where users can choose to sign in, register, or shop as a visitor.



Register

This form is displayed if users choose **Sign In > Register Here** on the pre-login Home page.



Home Page and Menus

The menu bars at the top and bottom of the Home page are available on all pages of the Web site. Links provided in each menu are described below.

Top Menu Bar

On this menu bar, users can:

- Click the Web site logo to return to the Home page.
- Click the help icon to access a help topic about the current page. The icon is displayed only if help is available for the page.
- View shopping cart status and click the cart for additional options.
- Access the **Shop**, **Activity**, or **Account** menus. You must be signed in to see the **Activity** and **Account** menus.

Shop Menu

Options on this menu are used to browse or search the product catalog. A category browser menu may be displayed, so users can scroll through product categories and click a category or subcategory to see available products.

Options include:

- All Products: To find items to order from the entire catalog.
- Top Sellers: To find items in a list of top selling products.
- Featured Products: To find items in a list of featured products.
- Place Order: For placing an order after adding products. Registered business-to-business customers can also add items to the order on this page using “quick order” fields, if the item number is known.
- Contract Order: For registered business-to-business customers to add contracted items to an order.

Activity Menu

For customers who sign in, this menu is used to access these pages:

- Order Status: To view order status.
- Returns: To request to return an item.
- Documents: To download relevant documents. Registered business-to-business customers can also upload documents using this page.
- Interactions: To enter messages to send us and respond to messages we send you.
- Announcements: To view company announcements.
- Knowledge Items: For accessing additional pages, including Press Releases, Video Library, Knowledge Base, White Papers, and Frequently Asked Questions (FAQ).
- Service: For accessing Unit Registration, Service Incidents, and Service Knowledge Base pages.

If you are a registered business-to-business customer, you may have these additional options on the **Activity** menu:

- Account Balance: To get account balance information.
- Invoices: To request reprints of invoices.
- Estimates: To look up estimates.
- Inventory: To see contracted inventory items.
- Consigned Inventory: To check replenishment needs for consigned inventory items, and submit used quantity.

Account Menu

For customers who sign in, this menu is used to access these pages:

- Inbox: For receiving messages on the Inbox page.
- Contact Us: To contact our company.
- Account Management: For adding to or updating account information. Some users may also have the option to add new users to their account.

Click **Sign Out** to log out of the portal.

Bottom Menu Bar

On this menu bar, users can:

- Select a language for Web site content.
- Click links to access the Home page, Products page, or Contact Us page.
- Click the **Help** link to access a list of help topics.
- Click links to access the Privacy Policy, Terms of Use, and Purchase Terms and Conditions pages.
- Search the product catalog.

Finding Items to Order

Click **Shop** to access pages for finding items to order. A category browser menu with a drop-down submenu may also be provided.

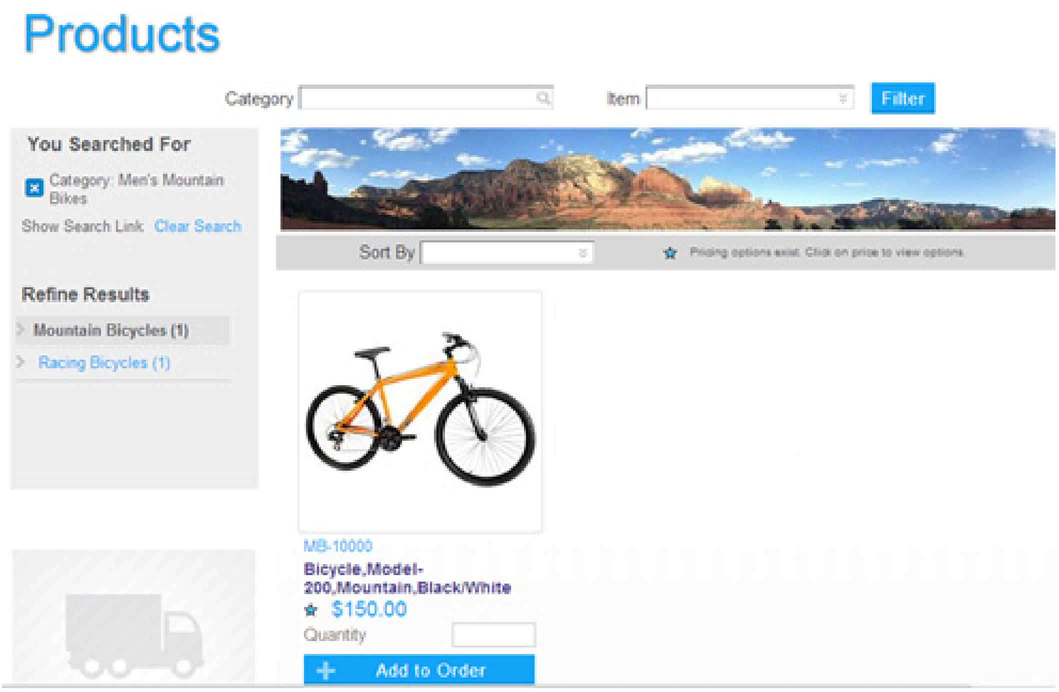
A keyword search bar is included at the top of the Products page. The search bar allows users to search for categories of items, if available, or individual items.

Users also can find items to order using the Top Sellers and Featured Products pages.

When users find an item of interest, they can click the item number, picture, or name to see its Product Details page.

Products

Click **All Products** on the **Shop** menu to display the Products page.



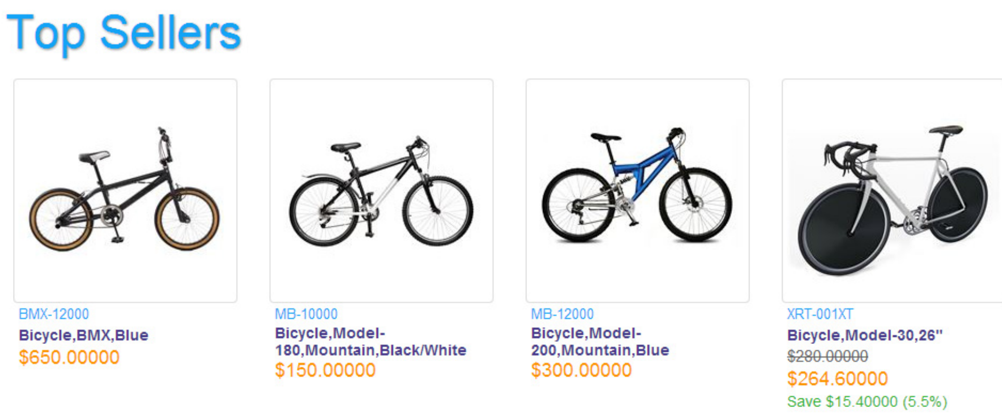
On this page, users can search for items to order, filter and sort items to refine their search, add items to an order, and check for pricing options.

For customers who register and sign in, your company's discounted price and savings is displayed, if applicable.

When users open this page from the **Shop** menu, all products in the catalog are displayed. If users open this page by clicking a category in the browser menu or by clicking a category from a category search, all products in the selected category are displayed.

Top Sellers

Click **Top Sellers** on the **Shop** menu to display the Top Sellers page.

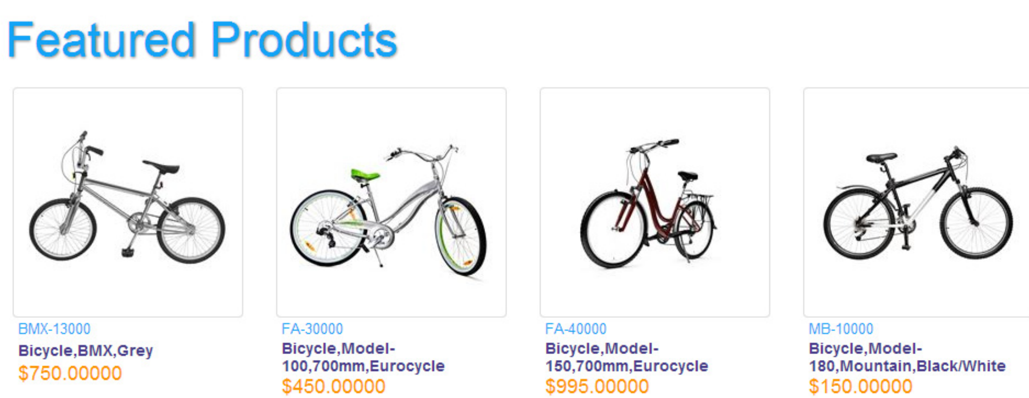


Top selling items are displayed on this page, along with the product picture, number, and name, and the discounted price for the product.

Click a product picture, number, or name to go to the Product Details page. Users can see more information and add the product to an order from the Product Details page.

Featured Products

Click **Featured Products** on the **Shop** menu to display the Featured Products page.

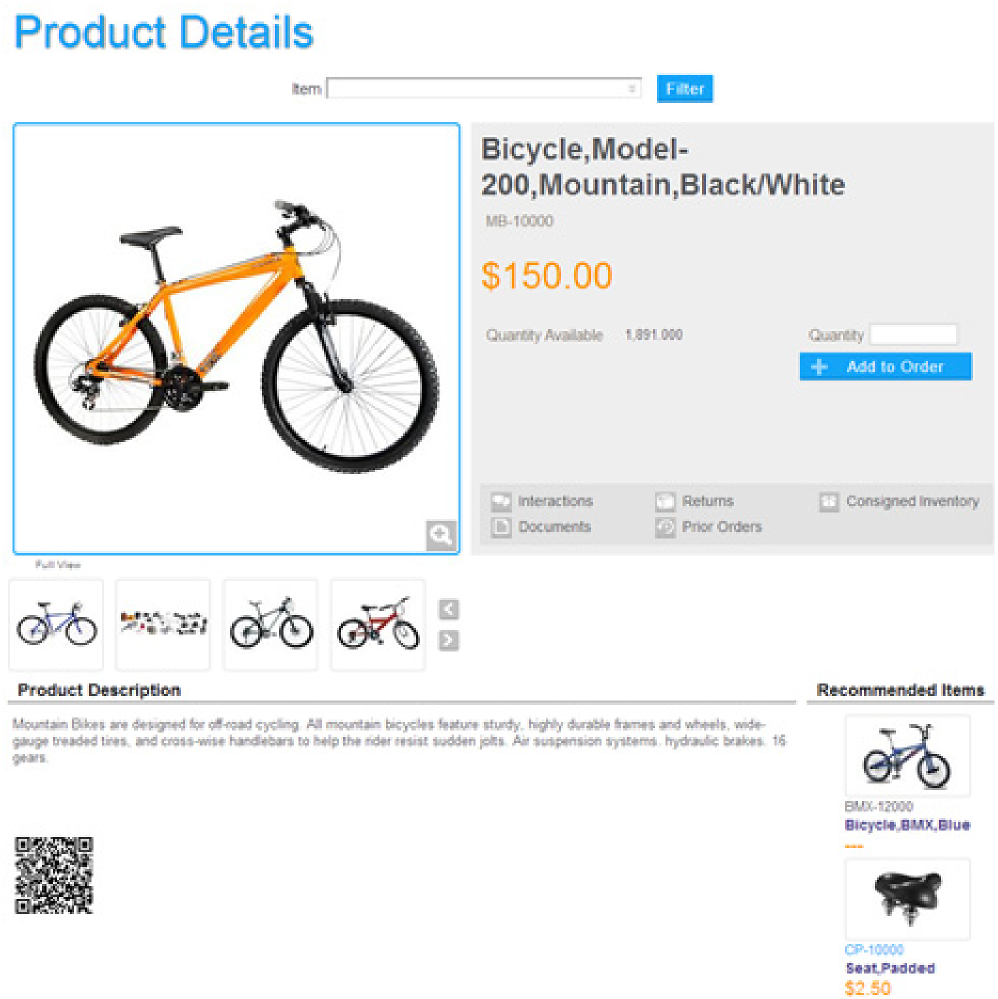


Featured products are displayed on this page, along with the product picture, number, and name, and the discounted price for the product.

Click a product picture, number, or name to go to the Product Details page. Users can see more information and add the product to an order from the Product Details page.

Product Details

Access this page by clicking the product picture, number, or name on other pages.

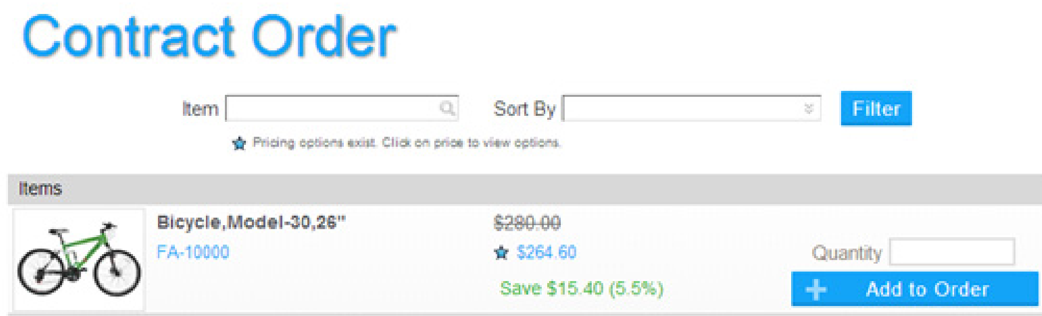


This page is used to view details about an item in the online store. Users can also add the item to an order using this page.

Contract Order

Click **Contract Order** on the **Shop** menu to display the Contract Order page.

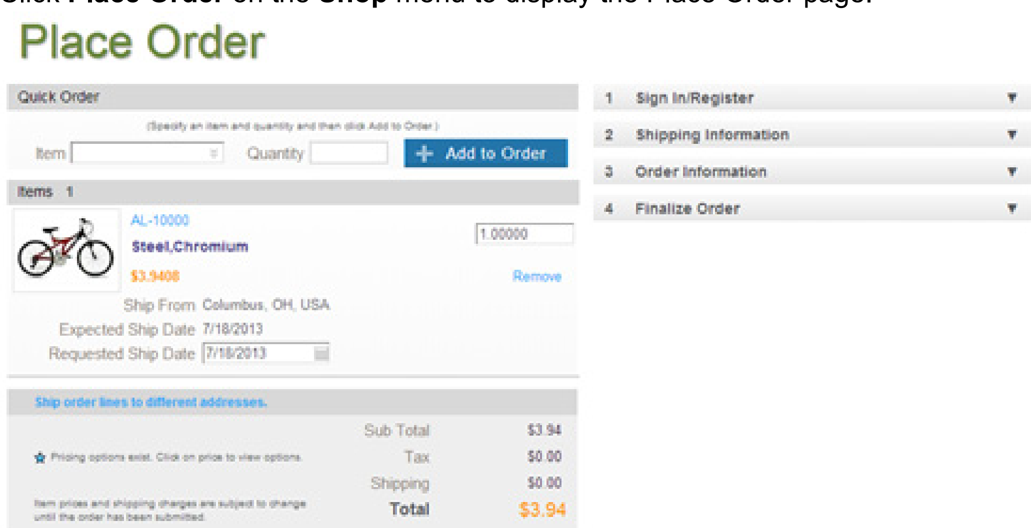
This page is provided for only registered business-to-business customers who contract with you for certain items.



This page is used to add contracted items to an order.

Place Order

Click **Place Order** on the **Shop** menu to display the Place Order page.

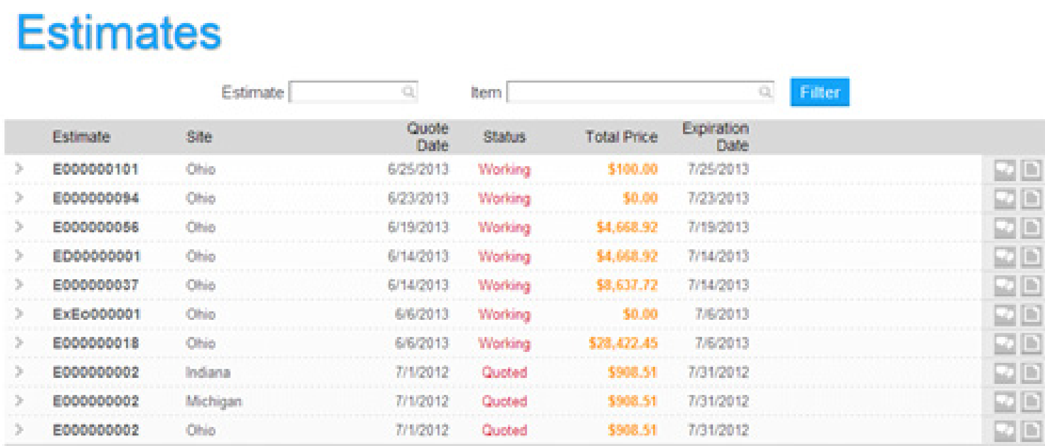


This page is used to submit an order for products added from other pages in the online store.

Estimates

Click **Estimates** on the **Activity** menu to display the Estimates page, where customer Estimates are displayed.

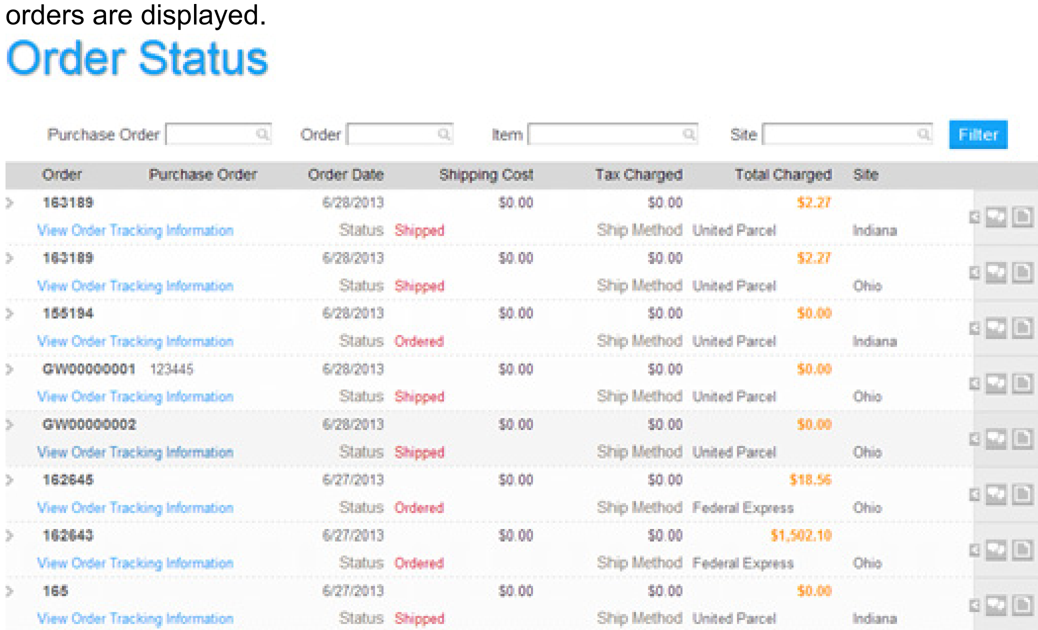
This page is available for only registered business-to-business customers.



Estimate	Site	Quote Date	Status	Total Price	Expiration Date
E000000101	Ohio	6/25/2013	Working	$100.00	7/25/2013
E000000094	Ohio	6/23/2013	Working	$0.00	7/23/2013
E000000056	Ohio	6/19/2013	Working	$4,668.92	7/19/2013
ED00000001	Ohio	6/14/2013	Working	$4,668.92	7/14/2013
E000000037	Ohio	6/14/2013	Working	$8,637.72	7/14/2013
ExEo000001	Ohio	6/6/2013	Working	$0.00	7/6/2013
E000000018	Ohio	6/6/2013	Working	$28,422.45	7/6/2013
E000000002	Indiana	7/1/2012	Quoted	$908.51	7/31/2012
E000000002	Michigan	7/1/2012	Quoted	$908.51	7/31/2012
E000000002	Ohio	7/1/2012	Quoted	$908.51	7/31/2012

Order Status

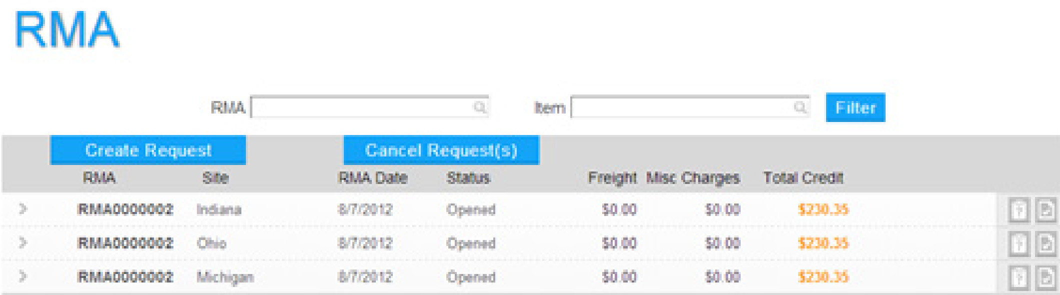
Click **Order Status** on the **Activity** menu to display the Order Status page, where customer orders are displayed.



Order	Purchase Order	Order Date		Shipping Cost	Tax Charged		Total Charged	Site
163189		6/28/2013		$0.00	$0.00		$2.27	
View Order Tracking Information		Status	Shipped		Ship Method	United Parcel		Indiana
163189		6/28/2013		$0.00	$0.00		$2.27	
View Order Tracking Information		Status	Shipped		Ship Method	United Parcel		Ohio
155194		6/28/2013		$0.00	$0.00		$0.00	
View Order Tracking Information		Status	Ordered		Ship Method	United Parcel		Indiana
GW00000001	123445	6/28/2013		$0.00	$0.00		$0.00	
View Order Tracking Information		Status	Shipped		Ship Method	United Parcel		Ohio
GW00000002		6/28/2013		$0.00	$0.00		$0.00	
View Order Tracking Information		Status	Shipped		Ship Method	United Parcel		Ohio
162645		6/27/2013		$0.00	$0.00		$18.56	
View Order Tracking Information		Status	Ordered		Ship Method	Federal Express		Ohio
162643		6/27/2013		$0.00	$0.00		$1,502.10	
View Order Tracking Information		Status	Ordered		Ship Method	Federal Express		Ohio
165		6/27/2013		$0.00	$0.00		$0.00	
View Order Tracking Information		Status	Shipped		Ship Method	United Parcel		Indiana

Returns

Click **Returns** on the **Activity** menu to display the Returns page, where customer return material authorizations are displayed.



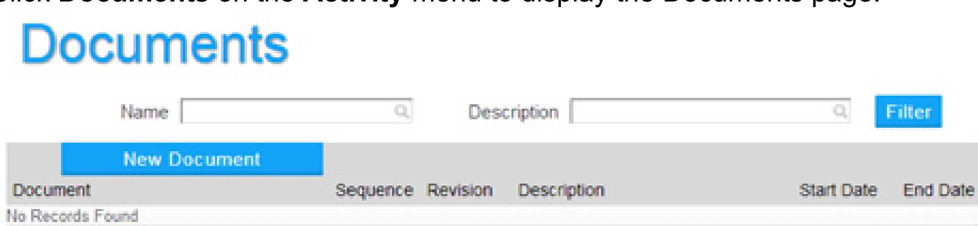
This page is used to:

- View existing return material authorizations (RMAs).
- Create a request for an RMA so that you can return an item.
- Cancel a request for an existing RMA.

Documents

Documents are image, text, PDF, or other types of files that are attached to customer, order, item, and estimate records, to provide additional information. Documents can provide general information, such as material specifications and material safety data sheets, and be made available to all Web site users. Documents also can provide specific information, such as contractual requirements and shipping instructions, and be made available to individual customers. Registered business-to-business customers can attach documents by uploading them on the Web site.

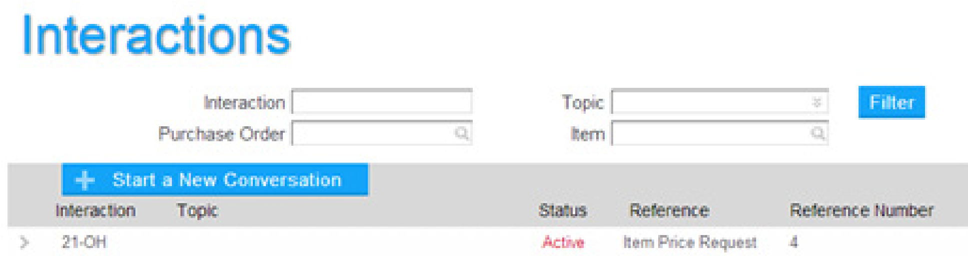
Click **Documents** on the **Activity** menu to display the Documents page.



Interactions

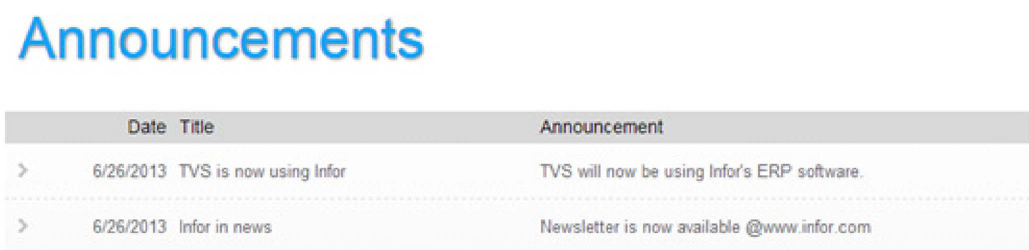
Interactions are messages sent back and forth about a particular order, estimate, item, or consigned item. Interactions specific to these records can be accessed from the Order Status, Product Details, Estimates, and Consigned Inventory pages, respectively. Or users can search through all interactions, listed by date, on the Interactions page.

Click **Interactions** on the **Activity** menu to display the Interactions page.



Announcements

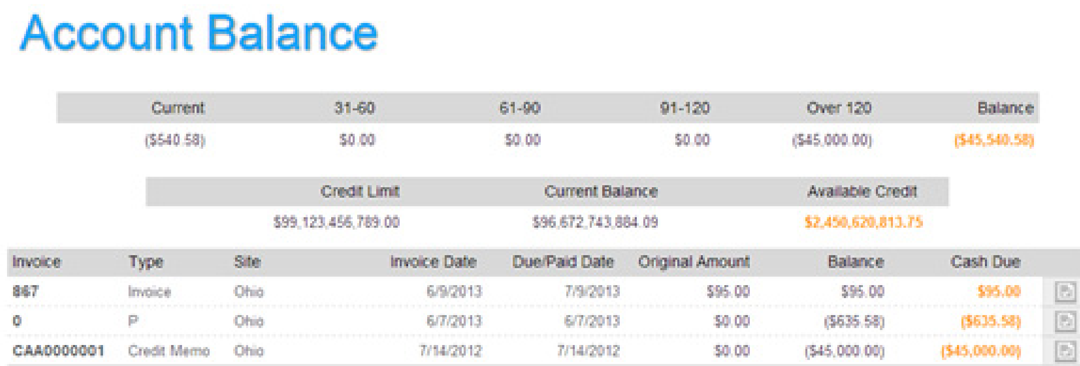
Click **Announcements** on the **Activity** menu to display the Announcements page, where company announcements are displayed for customers.



Account Balance

Click **Account Balance** on the **Activity** menu to display the Account Balance page, where customer account balances are displayed.

This page is provided for only registered business-to-business customers whose payment method is On Account.


Account Balance

Current	31-60	61-90	91-120	Over 120	Balance
($540.58)	$0.00	$0.00	$0.00	($45,000.00)	($45,540.58)

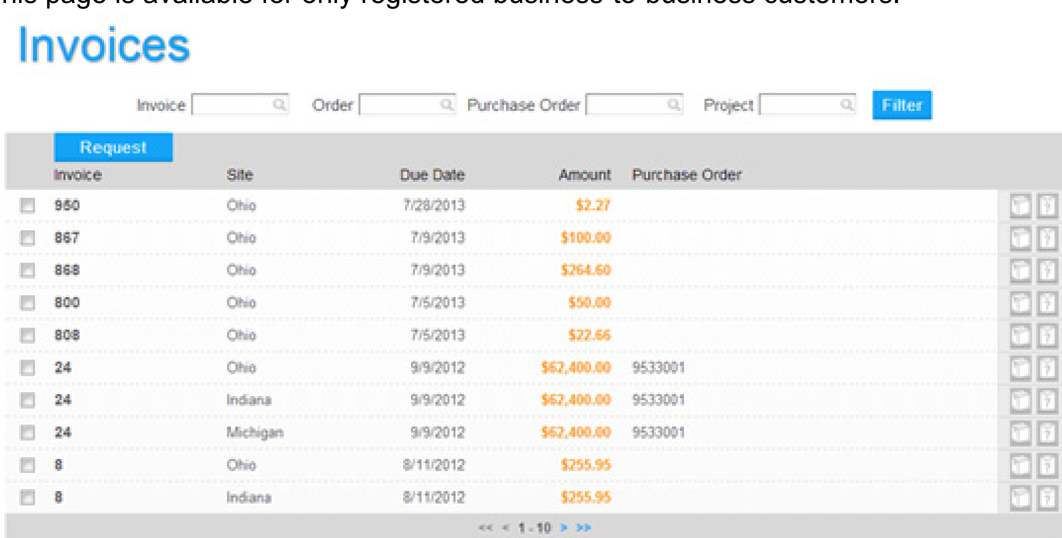
Credit Limit	Current Balance	Available Credit
$99,123,456,789.00	$96,672,743,884.09	$2,450,620,813.75

Invoice	Type	Site	Invoice Date	Due/Paid Date	Original Amount	Balance	Cash Due
867	Invoice	Ohio	6/9/2013	7/9/2013	$95.00	$95.00	$95.00
0	P	Ohio	6/7/2013	6/7/2013	$0.00	($635.58)	($635.58)
CAA0000001	Credit Memo	Ohio	7/14/2012	7/14/2012	$0.00	($45,000.00)	($45,000.00)

Invoices

Click **Invoices** on the **Activity** menu to display the Invoices page, where customer invoices are displayed.

This page is available for only registered business-to-business customers.


Invoices

Invoice | Order | Purchase Order | Project | Filter

Request

Invoice	Site	Due Date	Amount	Purchase Order
950	Ohio	7/28/2013	$2.27	
867	Ohio	7/9/2013	$100.00	
868	Ohio	7/9/2013	$264.60	
800	Ohio	7/5/2013	$50.00	
808	Ohio	7/5/2013	$22.66	
24	Ohio	9/9/2012	$62,400.00	9533001
24	Indiana	9/9/2012	$62,400.00	9533001
24	Michigan	9/9/2012	$62,400.00	9533001
8	Ohio	8/11/2012	$255.95	
8	Indiana	8/11/2012	$255.95	

<< < 1 - 10 > >>

Inventory

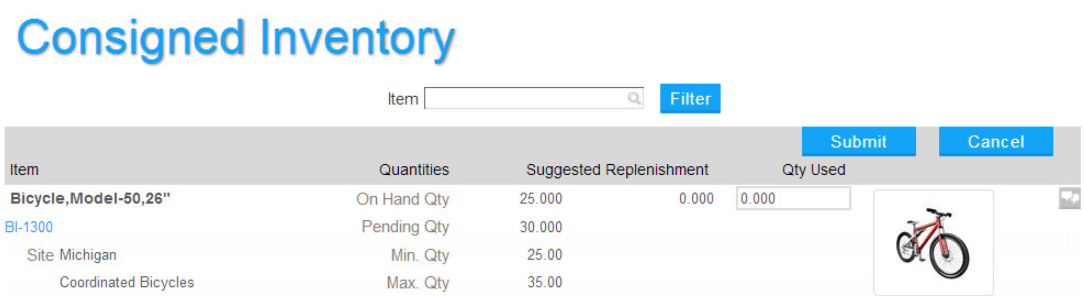
Click **Inventory** on the **Activity** menu to display the Inventory page, where customer contracted inventory items from all sites and warehouses are displayed.

This page is available for only registered business-to-business customers.

Consigned Inventory

Click **Consigned Inventory** on the **Activity** menu to display the Consigned Inventory page, where customer consigned items are displayed.

This page is available for only registered business-to-business customers.



Press Releases

Click **Knowledge Items** on the **Activity** menu and then click **Press Releases** to open the Press Releases page.

Video Library

Click **Knowledge Items** on the **Activity** menu and then click **Video Library** to display the Video Library page.

Knowledge Base

Click **Knowledge Items** on the **Activity** menu and then click **Knowledge Base** to display a knowledge base where customers can search for information.

White Papers

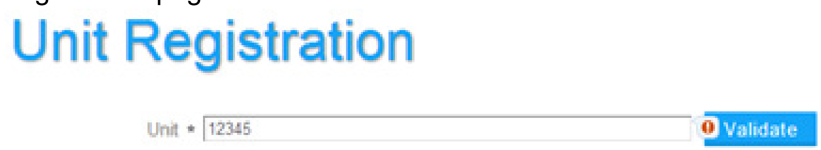
Click **Knowledge Items** on the **Activity** menu and then click **White Papers** to display the White Papers page.

Frequently Asked Questions (FAQ)

Click **Knowledge Items** on the **Activity** menu and then click **FAQ** to display a list of questions and answers.

Unit Registration

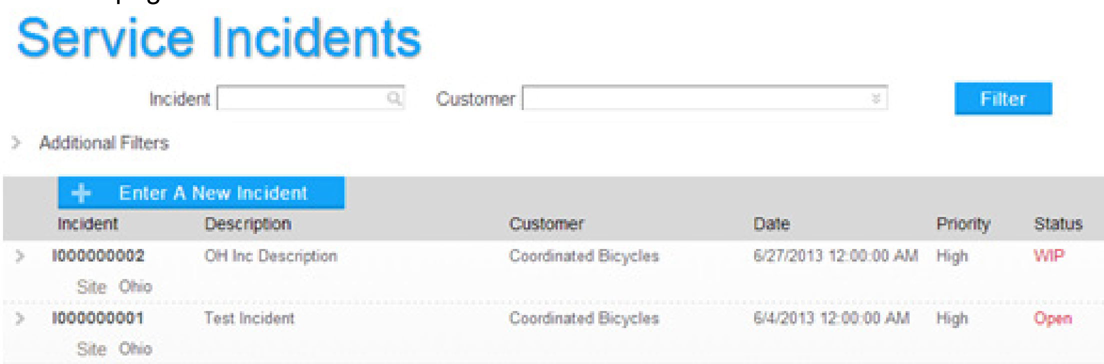
Click **Service** on the **Activity** menu and then click **Unit Registration** to display the Unit Registration page.



This page is used to register units under warranty.

Service Incidents

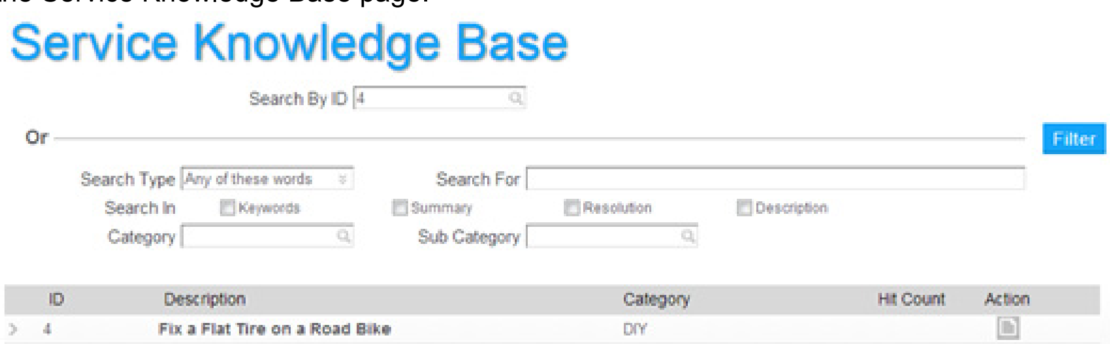
Click **Service** on the **Activity** menu and then click **Service Incidents** to display the Service Incidents page.



This page is used to review existing incidents, add notes or attach documents to an incident, and enter new incidents.

Service Knowledge Base

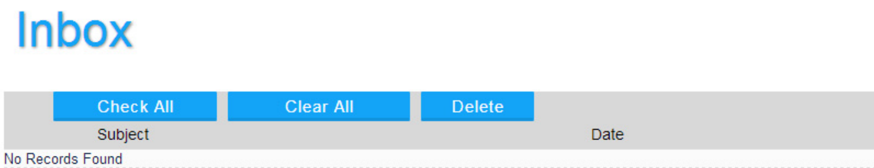
Click **Service** on the **Activity** menu and then click **Service Knowledge Base** to display the Service Knowledge Base page.



This page is used to find and review service information stored in the service knowledge base.

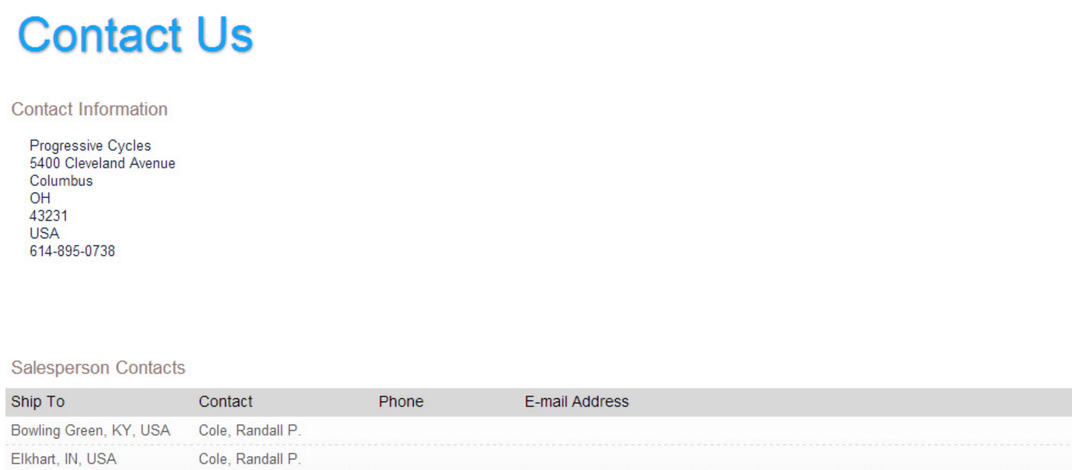
Inbox

Click **Inbox** on the **Account** menu to open the Inbox page, where messages you have sent your customer are displayed.



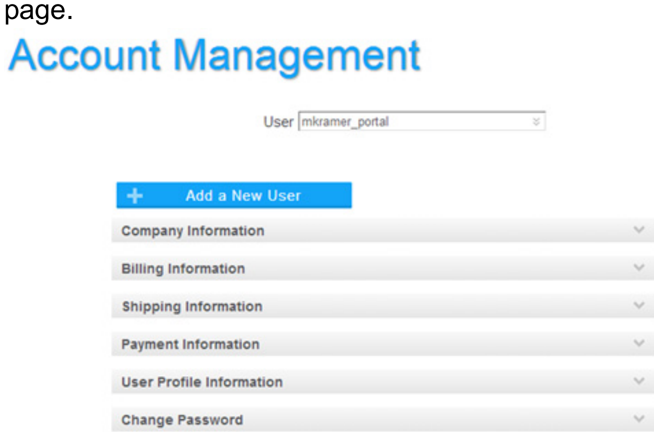
Contact Us

Click **Contact Us** on the **Account** menu to open the Contact Us page, where your contact information is displayed.



Account Management

Click **Account Management** on the **Account** menu to open the Account Management page.



Reseller Portal Pages Overview

12

The Reseller Portal provides new Web pages and functionality for your customers who are set up as resellers in SyteLine. This portal also includes all of the pages from the Customer Portal, which the reseller can use as your customer or for reseller tasks. For example, Reseller Portal users can:

- Place orders for themselves or for their customers
- Check order status for themselves or for their customers
- Look up estimates for themselves or for their customers

This chapter describes and shows examples of Reseller Portal features and pages after the portal is set up.

Reseller-Only Features of Customer Portal Pages

On many of the Reseller Portal pages that are inherited from the Customer Portal, the reseller can select a customer to “pose as”, so the reseller can see information and perform tasks specific to that customer.

Also, some of the portal pages inherited from the Customer Portal display commission amounts for the reseller.

This table shows which pages provide one or both of these reseller-only features:

Page Name	Includes Customer Option	Displays Commission Amount
Products	X	X
Product Details	X	X
Contract Order	X	X
Place Order	X	X
Featured Products	X	X
Top Sellers	X	X
Home Page	X	
Order Status	X	
Estimates	X	
Returns	X	
Account Management	X	

Reseller-Only Portal Pages

These pages are provided for resellers only:

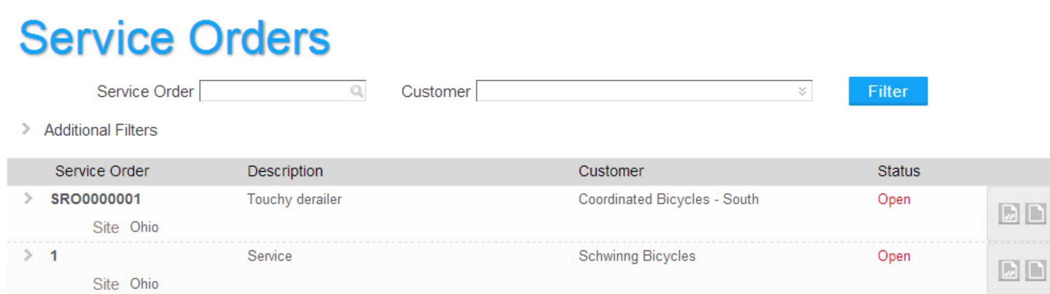
Portal Page	See Page
Service Orders	152
Service Order Transactions	153
Customers	153
Commissions Due	154

The remaining sections in this chapter show and briefly describe each Reseller Portal page. Additional instructions for using each page are provided as online help topics in the Reseller Portal. You can click the help icon in the upper right corner of each portal page to review the instructions. If the content provided isn't suitable for your portal users, you can personalize the online help as described in "Updating or Hiding Online Help (Optional)" on page 116.

NOTE: For information about the pages in Reseller Portal that are inherited from the Customer Portal, see Chapter 11, "Customer Portal Users and Pages Overview" .

Service Orders

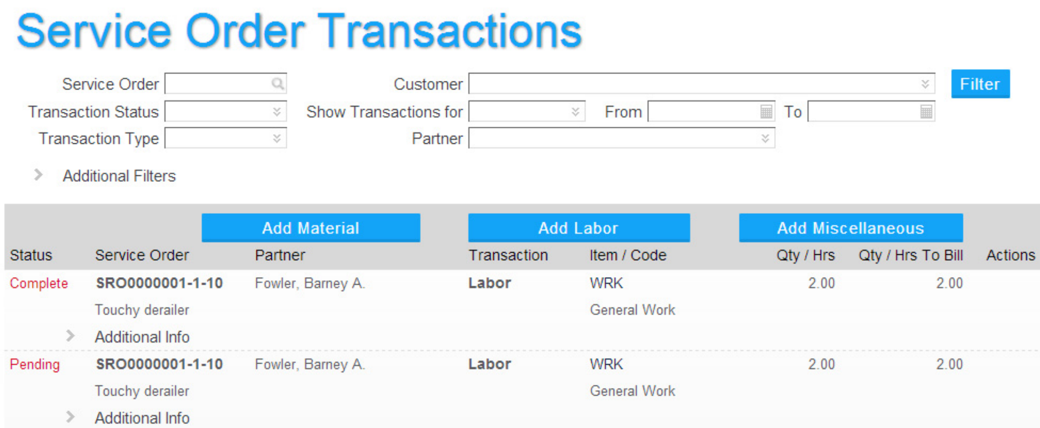
Click **Service** on the **Activity** menu and then click **Service Orders** to display the Service Orders page.



This page is used to review service request order (SRO) information.

Service Order Transactions

Click **Service** on the **Activity** menu and then click **Service Order Transactions** to display the Service Order Transactions page. You can also access this page by clicking a service order number on the Service Orders page.

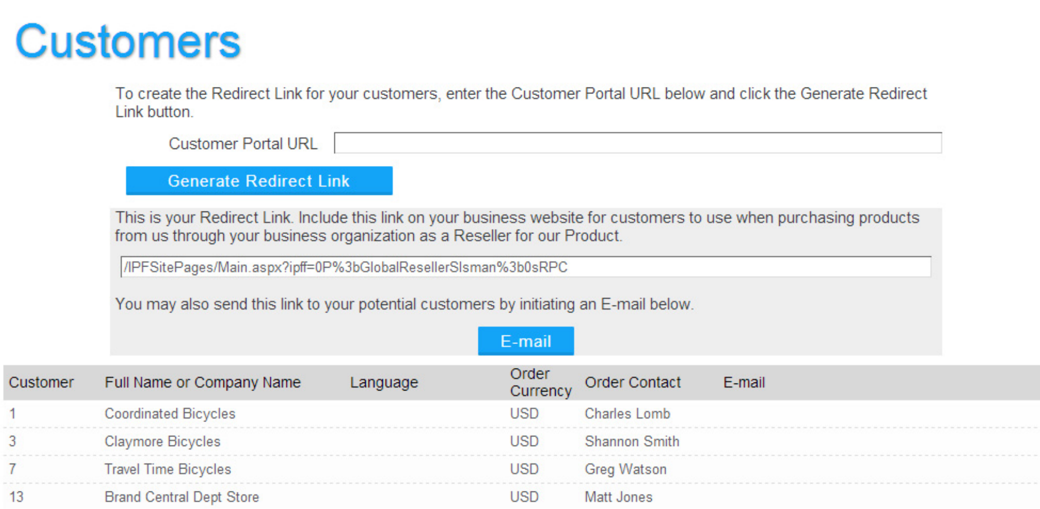


This page is used to:

- Review transactions recorded against a selected service request order (SRO)
- Post material, labor, and miscellaneous expenses to an SRO
- Change or delete SRO transactions that have a status of Submitted

Customers

Click **Customers** on the **Account** menu to display the Customers page.



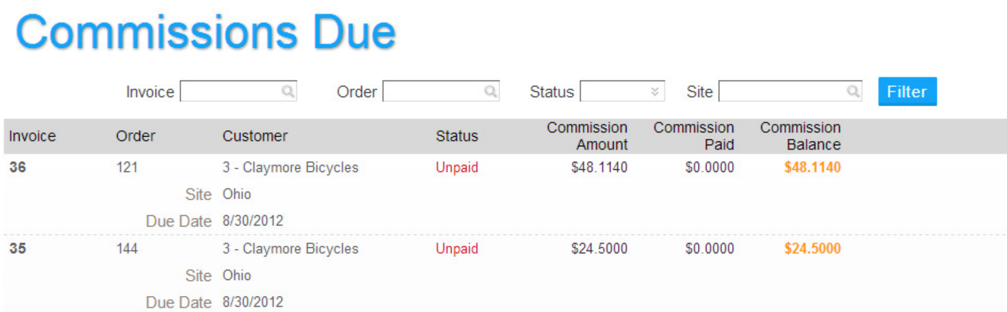
This page is used to view information about existing customers and to register new customers.

Resellers will receive commission on all orders placed in our online store by these customers.

Users can also generate a redirect link to the portal using this page, which can be copied and displayed on their Web site or e-mailed directly to customers. In order for customers to be associated with the right reseller account, they must use this link to access the portal.

Commissions Due

Click **Commissions Due** on the **Account** menu to display the Commissions Due page.



This page is used to review commission amounts due and statuses.

Vendor Portal Pages Overview

13

This chapter describes and shows examples of Vendor Portal pages after the portal is set up.

Portal page	Described on page
Login	156
Home page and portal menus	156
Purchase Orders	157
Planned Orders	157
Consigned Inventory	158
Inventory Level Projection	158
On Time Delivery	158
Product Price Contracts	159
Item Price Requests	160
Documents	160
Interactions	161
Announcements	161
Press Releases	161
Video Library	161
Knowledge Base	162
White Papers	162
FAQ	162
Inbox	162
Contact Us	163
My Profile	163
My Company Profile	164

Instructions for using each page are provided as online help topics in the Vendor Portal. You can click the help icon in the upper right corner of each portal page to review the instructions. If the content provided isn't suitable for your portal, you can personalize the online help as described in "Updating or Hiding Online Help (Optional)" on page 116.

Login Page

To access the portal, users open their favorite supported browser and enter the URL. The portal Login page is displayed.

Home Page and Menus

The menu bars at the top and bottom of the Home page are available on all pages of the Web site. Links provided in each menu are described below.

Top Menu Bar

On this menu bar, users can:

- Click the Web site logo to return to the home page
- Click the help icon to access a help topic about the page you're on. The icon is displayed only if help is available for the page.
- Access the **Activity** and **Account** menus.

Activity Menu

On this menu bar, users can access these pages:

- Purchase Orders: To view purchase order status.
- Planned Orders: To review planned orders and convert them to purchase orders or purchase order requisitions.
- Consigned Inventory: For checking replenishment needs for consigned inventory items, and evaluating past consumption.
- Inventory Level Projection: For checking projected inventory for an item.
- On Time Delivery: For checking on-time delivery percentages for purchase order lines.
- Product Price Contracts: To review and update product price contracts.
- Item Price Requests: To review and respond to item price requests.
- Documents: To upload and download relevant documents.
- Interactions: To enter messages to send and respond to messages received.
- Announcements: To view company announcements.
- Knowledge Items: For accessing additional pages, including Press Releases, Video Library, Knowledge Base, White Papers, and Frequently Asked Questions (FAQ).

Account Menu

On this menu bar, users can access these pages:

- Inbox: For receiving messages on the Inbox page.
- Contact Us: To contact your company.
- My Profile: For updating personal profile information.
- My Company Profile: For updating company profile information.

Click **Sign Out** to log out of the portal.

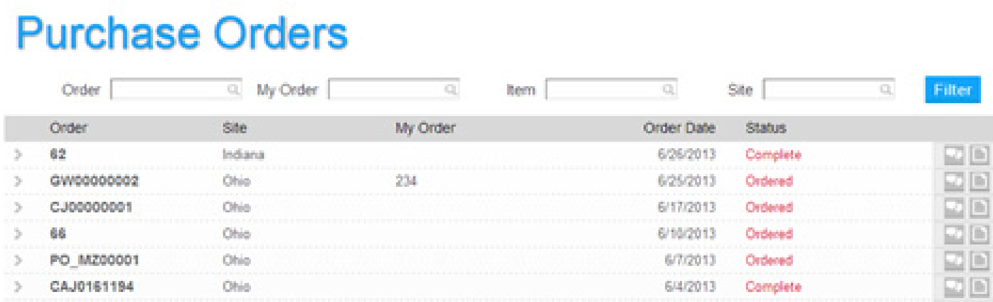
Bottom Menu Bar

On this menu bar, users can:

- Select a language for Web site content.
- Click links to access the Home page or Contact Us page.
- Click the **Help** link to access a list of help topics.
- Click links to access the Privacy Policy and Terms of Use pages.

Purchase Orders

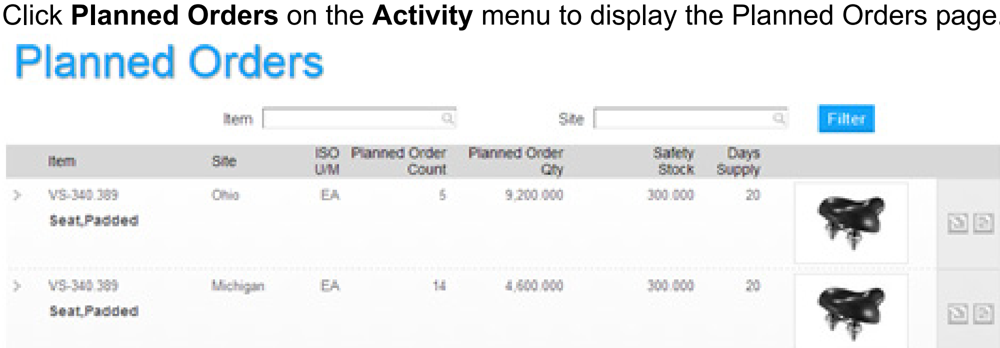
Click **Purchase Orders** on the **Activity** menu to display the Purchase Orders page.



On this page, purchase orders with a status of “Ordered” or “Complete” are displayed. Orders are sorted first by status in descending order and then by order date in ascending order. For example, the oldest PO that is still in “Ordered” status is displayed first.

Planned Orders

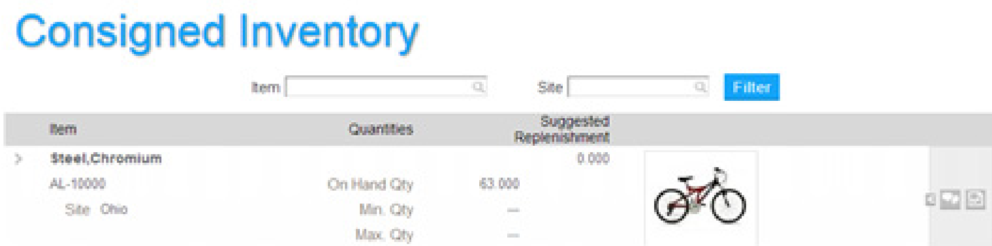
Click **Planned Orders** on the **Activity** menu to display the Planned Orders page.



This page is used to review planned orders generated during the latest planner run for the items vendors supply. Vendors may also be able to confirm planned orders online, to convert them to purchase orders or purchase order requisitions.

Consigned Inventory

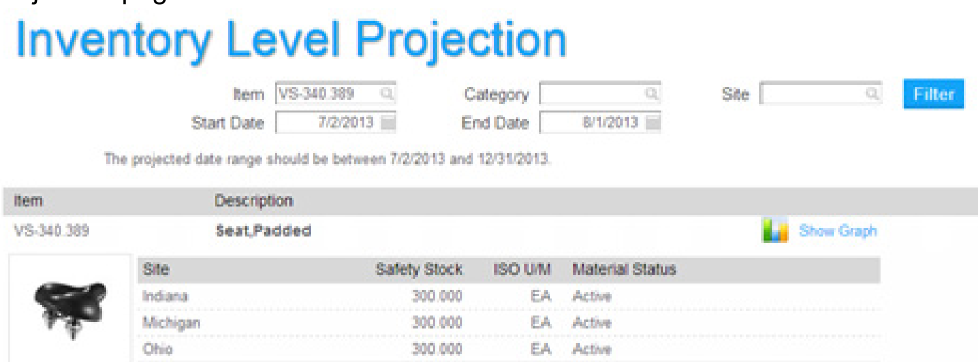
Click **Consigned Inventory** on the **Activity** menu to display the Consigned Inventory page.



On this page, consigned items are listed, starting with items that have the greatest need for replenishment. **Suggested Replenishment** is calculated by subtracting **On Hand Qty** from the **Min Qty**.

Inventory Level Projection

Click **Inventory Level Projection** on the **Activity** menu to display the Inventory Level Projection page.



This page displays the projected inventory level in tabular format for a selected item and date range. It also shows a comparison between the safety stock level and inventory level in graph format for the given date range.

NOTE: Projected inventory levels displayed on the portal do not include planned orders.

On Time Delivery

Click **On Time Delivery** on the **Activity** menu to display the On Time Delivery page.

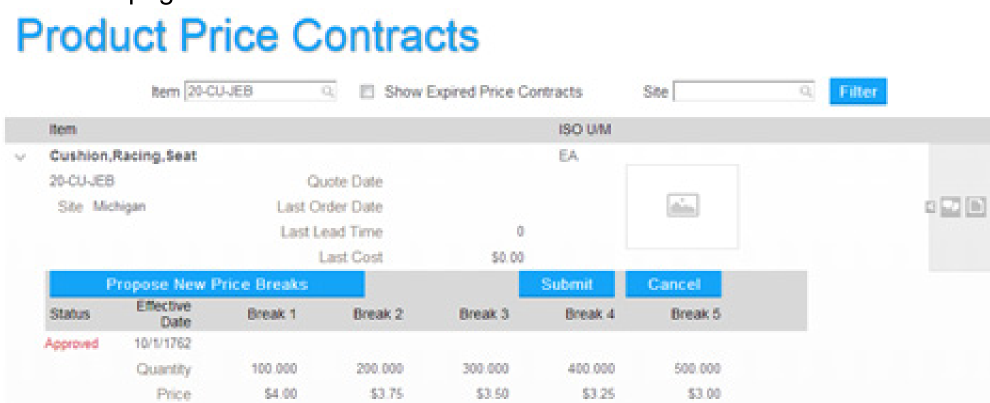
This page is used to review on-time delivery percentage for a given month range, and by shipped-to location if applicable. On-time delivery values are found by comparing the total number of purchase order lines due with the number of those lines received in full by the due date, or partially received with a status of “Filled” or “Complete”.

Value calculations consider:

- Data from all sites that are part of a multi-site company
- Both regular and blanket purchase orders
- Purchase orders with a status of “Ordered” or “Complete”
- Purchase order lines or releases with a status of “Ordered”, Filled”, or “Complete” and a line or release due date that is less than the last day of the current month

Product Price Contracts

Click **Product Price Contracts** on the **Activity** menu to display the Product Price Contracts page.

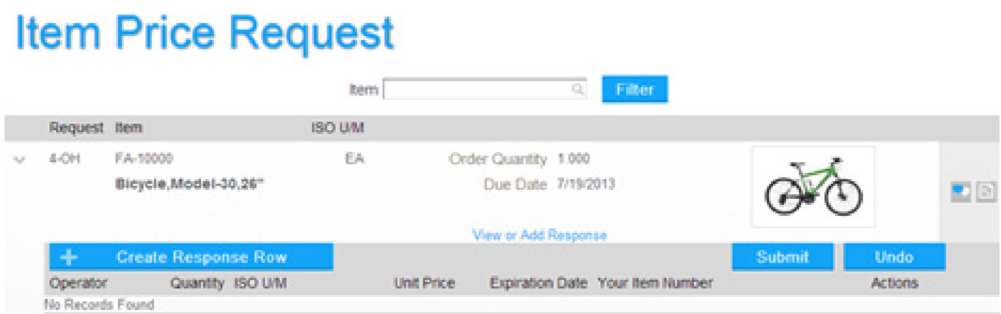


On this page, contracted items are listed in ascending order by item number. This page is used to:

- Review approved and pending price contracts for the items.
- Submit a new price break request for approval, for an existing contract.
- Update pricing information for pending requests.
- Delete pending requests that have not yet been approved.
- View and enter interactions for a selected product price contract.
- View and upload documents for a selected product price contract.

Item Price Requests

Click **Item Price Requests** on the **Activity** menu to display the Item Price Requests page.



On this page, item price requests are displayed in descending order by response due date. This page is used to review price requests and respond to them. Vendors can also update or delete price responses that have not been accepted or closed.

Documents

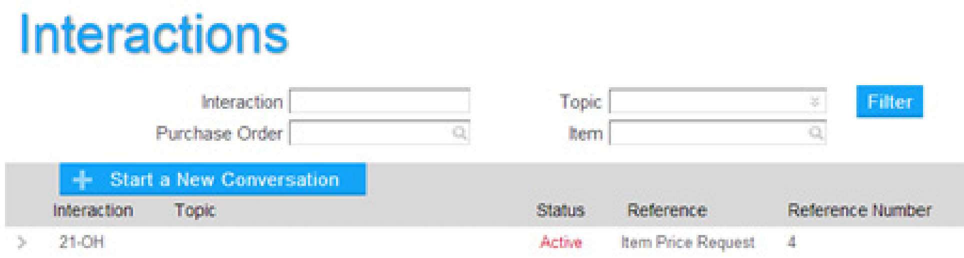
Documents are image, text, PDF, or other types of files that are attached to purchase order and product price contract records, to provide additional information. Documents can provide general information, such as shipping terms and general contract specifications, and be made available to all portal users. Documents also can provide specific information, such as order requirements and material test results, and be made available to individual vendors. Vendors can attach documents by uploading them in Vendor Portal as described below.

Click **Documents** on the **Activity** menu to display the Documents page.

Interactions

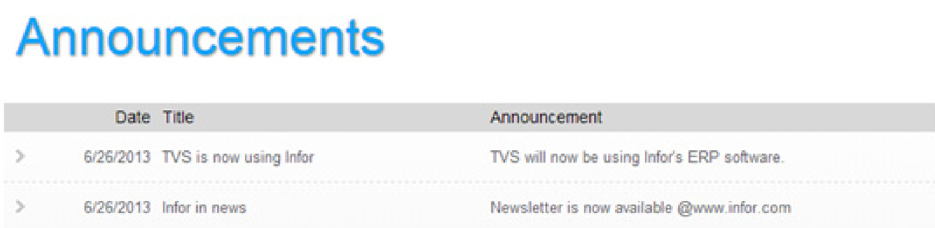
Interactions are messages sent back and forth about a particular purchase order, item price request, product price contract, or consigned item. Interactions specific to these records can be accessed from the Purchase Orders, Item Price Requests, Product Price Contracts, and Consigned Inventory pages, respectively. Or vendors can search through all interactions, listed by date, on the Interactions page.

Click **Interactions** on the **Activity** menu to display the Interactions page.



Announcements

Click **Announcements** on the **Activity** menu to display the Announcements page, where company announcements are displayed for vendors.



Press Releases

Click **Knowledge Items** on the **Activity** menu and then click **Press Releases** to open the Press Releases page.

Video Library

Click **Knowledge Items** on the **Activity** menu and then click **Video Library** to display the Video Library page.

Knowledge Base

Click **Knowledge Items** on the **Activity** menu and then click **Knowledge Base** to display a knowledge base where users can search for information.

White Papers

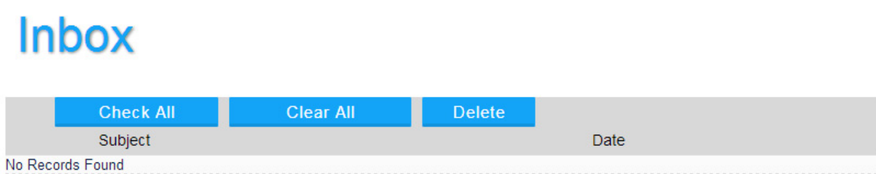
Click **Knowledge Items** on the **Activity** menu and then click **White Papers** to display the White Papers page.

Frequently Asked Questions (FAQ)

Click **Knowledge Items** on the **Activity** menu and then click **FAQ** to display a list of questions and answers.

Inbox

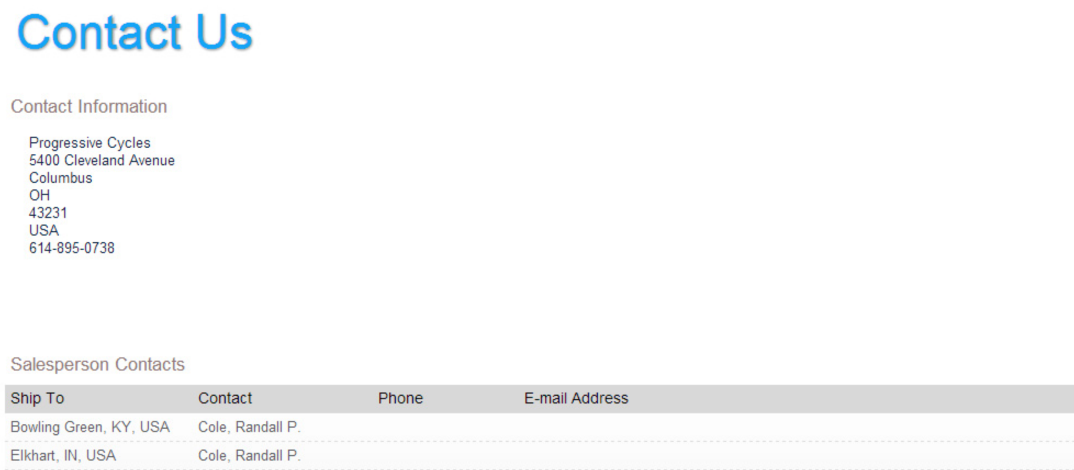
Click **Inbox** on the **Account** menu to open the Inbox page.



Contact Us

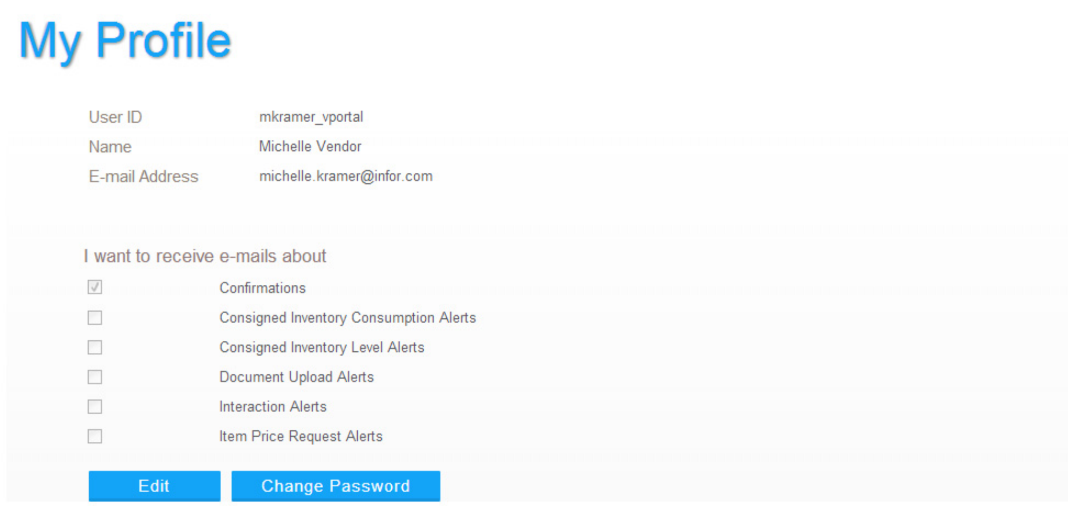
Click **Contact Us** on the **Account** menu to open the Contact Us page.

This page displays contact information for your company.



My Profile

Click **My Profile** on the **Account** menu to display the My Profile page.



This page displays the information you have about each user. Users can edit their full name e-mail address, and notification subscriptions. They can also change their password from this page.

My Company Profile

Click **My Company Profile** on the **Account** menu to display the My Company Profile page.

This page displays the information you have about each user's company. Users can edit most information on this page.

Using Portal Diagnostics

14

The Portal Manager provides developers and administrators with diagnostic logging functionality and the Diagnostic Viewer, an advanced monitoring tool that shows real-time trace log and event activity. These features allow you to collect, filter, and view diagnostic log data from the SharePoint server(s). The log messages provide internal details about the progress or trace log of SharePoint portal applications and custom script.

This chapter covers these topics about portal diagnostics:

Logging Diagnostic Messages

We recommend that you enable diagnostic logging only when you need information for troubleshooting, which minimizes performance impact on your system. When you have determined that certain portal events need to be monitored, you can enable logging on specified servers and events.

To configure diagnostic logging:

1. Open Portal Manager and connect to the portal for which to log events.
2. Select **Diagnostics**.
3. Select **Start/Stop Logging**.
4. Select the server(s) to log.
5. Select the event(s) to log. When you select a category, all events within the category are selected. You can expand the categories to select or clear individual events. As long as one event is selected within a category, the category remains selected.

6. Click the Save icon on the right side of the screen.

   You can update the configuration any time by changing your selections and clicking Save. The new configuration is saved and used each time you enable logging, until you change the configuration and save again.

   To stop logging, clear the **Start/Stop Logging** check box.

NOTE: If multiple administrative users connect to the same portal to run diagnostics, they will all see the last server and event configuration saved by any user. To change servers and events logged without affecting all users, use the filtering options described in “Filtering Diagnostic Messages” on page 168. These setting apply to only your local Diagnostic Viewer.

Unexpected Errors

There are times when a message is logged in diagnostics even if you have not enabled logging in Portal Manager. An API has been added to the portal pages which forces a message into the log when an unexpected error occurs, including:

- The IDO collection load fails
- A custom load method fails
- A call to a backend stored procedure fails
- Saving changes to SyteLine fails

For these types of unexpected errors, the following message is displayed to the portal user: “The system encountered an unexpected error. Refresh the screen and try again. If the problem continues, please contact the Web site administrator. Error: <number>.”

A different error number is system-generated each time one of these types of error occurs. You can search for the error number in portal diagnostics to troubleshoot the problem.

Viewing Diagnostic Messages

After you have configured and enabled logging, diagnostic logs can be collected and viewed in real time using the Diagnostic Viewer. The Viewer is launched in a separate window, so you can use Portal Manager and the Viewer at the same time.

To view diagnostic messages:

1. Click **Launch Viewer**.
2. Click the Start (traffic signal) icon.

   NOTE: If you encounter problems at this stage, see “Diagnostics Viewer Error” on page 184.

3. As the Viewer collects data, you can use these toolbar and **Edit** menu options:

Option	Description
Stop	Stops the Viewer from collecting data. This does not stop events from being logged on the server.
Modify Filter	Opens the **Filter Configuration** form, so you can set up a new filter or load an existing one. See “Filtering Diagnostic Messages” on page 168.
Clear Filter	Clears modifications made to the filter.
Erase Grid	Clears the collected events from the Viewer log.
Auto Scroll	Positions the record pointer at the end of the log file, so you can see each new event as it is added.
Note	Allows you to add a note to each diagnostic log record as it is saved to a file using the **File** menu command.
Highlight	Highlights all events in a column with the same value when you hover over a particular field value.
Find	Allows you to search all cells in all displayed diagnostic logs for specified text.
Column Chooser	Opens the **Choose Columns** form, so you can select and position columns to display in the Viewer.
Server Status	Opens the **Server Statuses** form, so you can see the status of specified servers and perform actions on them. See “Status Bar” on page 167.
User Status	Opens the **User Status** form, so you can see which users are signed in to the Diagnostic Viewer.
Reset Log Order	You can sort data log data by clicking column headers. To set data in the log back to its original order, click **Reset Log Order**.

Message Detail

Detail information for diagnostic messages can be reviewed at the bottom of the Viewer form, in grid or XML format.

Status Bar

The status bar shows the total number of diagnostic records collected and the position of a selected record in the grid. When the Viewer is connected to the server, it also displays icons for server and user status.

Server Status: Click the icon (or select **Edit > Server Status**) to open the **Server Statuses** form. On this form, servers with a green icon are online and the Windows Service is available. Servers with a red icon are either offline or the Windows Service is not started or not responsive. You can right-click a server on the **Server Status** form to perform these actions:

- Restart the diagnostic service: The restart is performed on the selected server if the service is stopped.
- Erase the diagnostic log: This clears every diagnostic log from the server’s event log, without backing them up.

  NOTE: To restart the diagnostic service or clear the diagnostic log, you must be an administrator or member of the administrators group on the server.

User Status: Click the icon (or select **Edit > User Status**) to open the **User Status** form. This form shows which users are signed in to the Diagnostic Viewer.

Filtering Diagnostic Messages

Using the **Filter Configuration** form, you can refine which logged message are displayed in the Portal Manager Diagnostics Viewer for yourself, without affecting other users. For example, you could specify: User - Contains - <yourportalusername>.

To filter the diagnostic viewer messages:

1. Open the Diagnostic Viewer and select **Edit > Modify Filter**.
2. Select servers and events to filter.
3. Specify dates in the past during which to show messages for the specified servers and events.
4. To further restrict collected events, you can specify additional criteria in the section near the bottom of the form. If necessary, you can group conditions in your custom filter criteria.
5. Click **Apply**.

Saving and Loading Filter Configurations

You can save and reuse filter configurations as needed. This can be helpful, for example, to find common characteristic between two sets of data or to show another portal administrator how to trim down a set of logs to find a particular trend.

Filter configurations are saved to the server farm, where they can be accessed at any time by any Portal Manager instance connected to that farm.

To save and later load a filter configuration:

1. After setting up and applying the filter on the F**ilter Configuration** form, select **File > Save Filter** on that form.
2. Specify a name for the filter. You can choose to overwrite an existing filter.
3. Click **Save Filter**. The filter is saved to the farm.
4. To reuse that filter, simply open the **Filter Configuration** form, select **File > Load Filter**, select the filter to use, and then click **OK**. Click **Apply** to apply the filter to diagnostic messages.

Understanding Diagnostic Messages

This section describes all diagnostic messages the architecture can log. All messages have a base set of parameters:

- Application: The name of the Web application logging the message.
- Url: The absolute URL logging the message.
- User: The user name currently signed in.
- Category: The type of message being logged.
- Event: The name or title of the diagnostic message. Some are predefined in the architecture; however, developers can create their own.
- Title: The name and location of the field display format or Web Part creating this diagnostic message. For example:
  - TopBarGrid in IPFDemo_TopMenu with IPFDemo_FDF_TopBarGrid. This is the name of the cell (TopBarGrid), the parent layout (IPFDemo_TopMenu), and the name of the field display format on the cell (IPFDemo_FDF_TopBarGrid).
  - Grid Web Part on /IPFSitePages/IPFDemo_Barcodes.aspx. This is the name of the Web Part (Grid Web Part), the location of the page it's on (IPFSitePages), and the page file name (IPFDemo_Barcodes.aspx).

Administration Messages

Event	Explanation	Additional Parameters
PushToSTS	The STS configuration file has been updated.	ContentChanges

Authentication Messages

Event	Explanation	Additional Parameters
SuccessfulLogin	The login attempt is successful.	User Status
FailedLogin	The login attempt is unsuccessful.	User Status Failed Login
AccessDenied	The user does not have the required credentials to access the given resource.	User Status
MongooseCryptLogonKey	An authentication request is made through Mongoose.	ServerSpec Configuration SessionID
MongooseCryptLogonKey Response	The response to the authentication request made through Mongoose.	ServerSpec Configuration SessionID
MongooseOpenSession	Opening a Mongoose session.	ServerSpec SessionID LoginAttempt UserName Configuration ApplicationName MachineName DomainUserName AllowCloseExitingSessions Workstation
MongooseOpenSessionRe sponse	The response to the opening of a Mongoose session.	ServerSpec Configuration SessionID LoginSucceeded ConnectedAs

Translation Messages

Event	Explanation	Additional Parameters
MongooseLoadStrings	A call is made to Mongoose to translate stringIDs.	ServerSpec Configuration SessionID String Table Default Group LCID String(s)
MongooseLoadStringsRes ponse	The response to the MongooseLoadStrings call.	ServerSpec Configuration SessionID String(s)

Data Source Messages

Event	Explanation	Additional Parameters
DatasourceSharePointDetails	A data fetch has succeeded, and if logged, this event will contain the details of the fetch.	DataSourceType DataSourceName ViewFields Query ResultDetails
DatasourceFetchCall	A data fetch has been attempted.	DataSourceType DataSourceName Collection MappedCollection Identifying Values Fetching Read Only Record Flag Properties Fetched
DatasourceFetchSuccess	The data has been fetched successfully.	DataSourceType DataSourceName Collection MappedCollection Result
DatasourceFetchFail	The data fetch has failed.	DataSourceType DataSourceName Collection MappedCollection Error
DatasourceFetchResults	This event controls the ResultDataTable property of the DatasourceFetchSuccess event. If this event is not logged, the property is empty.	Result NewBookmark RowsReturned ResultDataTable
DatasourceAddCall	A record is being added to a collection.	Collection MappedCollection Modified Values Modified Keys Modified Read Only Properties Refreshing
DatasourceAddCallSuccess	A record has been added successfully.	Collection MappedCollection Result
DatasourceAddCallFail	An attempt to add a record to a collection has failed.	Collection MappedCollection Error

Event	Explanation	Additional Parameters
DatasourceUpdateCall	A data update has been attempted.	DataSourceType DataSourceName Collection MappedCollection Identifying Values Modified Values Modified Keys Input Values Refreshing
DatasourceUpdateSuccess	A data update has succeeded.	DataSourceType DataSourceName Collection MappedCollection Result
DatasourceUpdateFail	A data update has failed.	DataSourceType DataSourceName Collection MappedCollection Error
DatasourceDeleteCall	A data delete has been attempted.	DataSourceType DataSourceName Collection MappedCollection Deleting
DatasourceDeleteSuccess	A data delete has succeeded.	DataSourceType DataSourceName Collection MappedCollection Result
DatasourceDeleteFail	A data delete has failed.	DataSourceType DataSourceName Collection MappedCollection Error
DatasourceMethodCall	A datasource method has been called.	DataSourceName MethodClass Method Parameters ReturnValue
DatasourceMethodSuccess	A datasource method has completed successfully.	DataSourceName MethodClass Method Parameters ReturnValue

Event	Explanation	Additional Parameters
DatasourceMethodFail	A datasource method has failed.	DataSourceName MethodClass Method Parameters ReturnValue
DatasourceTableMethodCall	A datasource method which returns a dataset has been called.	DataSourceName MethodClass Schema Parameters Method Record Cap
DataSourceTableMethodSuccess	A datasource method which returns a dataset has been completed successfully.	DataSourceName MethodClass Schema Parameters Method Record Cap RowsReturned ReturnValue
DatasourceTableMethodFail	A datasource method which returns a dataset has failed.	DataSourceName MethodClass Schema Parameters Method Record Cap Error
DatasourceCollectionDefinitionCall	A datasource collection definition is being retrieved.	Collection
DatasourceCollectionDefinitionSuccess	The collection definition has been successfully retrieved.	Collection MappedCollection DataSourceType DataSourceName Properties Identifying Properties Diagnostic
DatasourceCollectionDefinitionFail	The collection definition has failed.	Collection Error

SyteLine Data Source Messages

These messages relate specifically to the SyteLine data source.

Event	Explanation	Additional Parameters
MongooseInvoke	A SyteLine method is being invoked.	ServerSpec Configuration SessionID XMLRequest
MongooseInvokeResponse		ServerSpec Configuration SessionID XMLResponse
MongooseLoad	Records are being loaded from a SyteLine datasource.	ServerSpec Configuration SessionID IDO Name XMLRequest
MongooseLoadResponse		ServerSpec Configuration SessionID XMLResponse
MongooseUpdate	Records are being updated in a SyteLine datasource.	ServerSpec Configuration SessionID XMLRequest
MongooseUpdateResponse		ServerSpec Configuration SessionID XMLRequest
MongooseSaveDataTable	Records are being added to a SyteLine datasource.	ServerSpec Configuration SessionID
MongooseSaveDataTableResponse		ServerSpec Configuration SessionID
MongooseGetPropertyInfo	Information about a property on a SyteLine collection is being retrieved.	IDO Name ServerSpec Configuration SessionID
MongooseGetPropertyInfoResponse		ServerSpec Configuration SessionID IDO Name Properties XMLResponse

Event	Explanation	Additional Parameters
MongooseDelete	Records in a SyteLine datasource are being deleted.	ServerSpec Configuration SessionID
MongooseDeleteResponse		ServerSpec Configuration SessionID
MongooseGetIDONames	The IDO names in a SyteLine datasource are being retrieved.	ServerSpec Configuration SessionID
MongooseGetIDONamesResponse		ServerSpec Configuration SessionID IDO Names

SQL Data Source Messages

Event	Explanation	Additional Parameters
SQLDelete	Records in a SQL datasource are being deleted.	DataSourceType DataSourceName CommandText Timeout in Seconds
SQLInsert	Records in a SQL datasource are being inserted.	DataSourceType DataSourceName CommandText Timeout in Seconds
SQLSelect	Records in a SQL datasource are being selected.	DataSourceType DataSourceName CommandText Timeout in Seconds
SQLUpdate	Records in a SQL datasource are being updated.	DataSourceType DataSourceName CommandText Timeout in Seconds

Server Processing Messages

These events indicate activity on the server side, often in response to client-side activity:

Event	Explanation	Additional Parameters
FileUploaded	A file has been received by the server.	
DatumRendered	A field has been rendered.	FDFName FDFClass FDF ID IsHeader Style Input Value HTML Tag
DatumRenderError	A field has failed to render.	FDFName FDFClass FDF ID IsHeader Style Input Value HTML Tag Error
ImageRenderError	An image has failed to render.	Error
FilterReceived	A filter has been received by the server.	FDFName FDFClass Received Filter Processed Filter Where Clause Orderby Clause Properties Not In Collection Properties Not Filterable

Client Scripting Messages

These events fire on the client. They typically happen before client-side handlers or as a result of a client scripting operation.

Event	Explanation	Additional Parameters
ClientComponentClickedHandler	A component click is being processed.	
ClientDataChangedHandler	The data in a component has been changed on the client.	
ClientScriptCompileError	A client script failed to compile.	
ClientScriptCompileWarning	A client script has a compile warning.	
ClientScriptExecuting	A client script method is executing.	
ClientScriptRuntimeError	A client script failed to run.	

Event	Explanation	Additional Parameters
ClientAlertSent	An alert has been sent from a component.	
ClientCookieSet	A cookie has been set.	
ClientSessionVariableSet	A session variable has been set.	
ClientLayoutVariableSet	A layout variable has been set.	
FillinEnteredHandler	A fillin has been entered by the user.	
FillinExitedHandler	A fillin has been exited by the user.	

Server Scripting Messages

The following events pertain to server scripting:

Event	Explanation	Additional Parameters
ScriptExecuting	A server-side script method is executing.	Layout Name Event Name
ServerScriptRuntimeError	Server-side code throws an exception during execution.	LayoutName Event Name Runtime Error
ServerScriptCompileError	Server-side code has a compile error.	Layout Name Event Name Compile Error
ServerScriptCompileWarning	Server-side code has a compile warning.	
NotLicensed	The developer is not licensed to run custom code from the given layout.	Layout Name Event Name Not Licensed
FilterChangedHandler	A filter-changed event is being processed on the server side.	FDFName FDF ID IsHeader FDFClass Style Input Value
ComponentClickedHandler	A component-click event is being processed on the server side.	FDFName FDF ID IsHeader FDFClass Style Input Value
ModalClosedHandler	A modal-window-closed-event is being processed on the server side.	FDFName FDF ID IsHeader FDFClass Style Input Value

Event	Explanation	Additional Parameters
TableMethodPutBack	A table method (custom load) is being processed on the server side.	DataSourceName MethodClass Method PropertiesReceivedFromMethod PropertiesInCollection PropertiesPopulated
CookieSet	A cookie was set on the server side.	Cookie Value Expiration
SessionVariableSet	A session variable was set on the server side.	Name Value
LayoutVariableSet	A layout variable was set on the server side.	Name Value
AlertSent	An alert was sent from the server-side.	Target Component Item Index Alert Variables

Custom Metrics

This category is used for all diagnostic messages triggered by the developer's scripting code.

Event	Explanation	Additional Parameters
CustomMessage	A message defined by the developer.	ClientOrServerScript Message
CustomError	A custom message meant to be thrown during unexpected conditions.	ClientOrServerScript Message

Saving and Loading Diagnostic Log Files

When you are not collecting messages in real-time mode, either because you have stopped logging or you are viewing results after applying a filter, you can save the current collection of messages to a local log file on your hard drive. Select **File > Save** and save the log file in XML or CSV format.

To review that file later in the Diagnostic Viewer, select **File > Open** and then locate and load the file.

Troubleshooting

15

This chapter provides troubleshooting information for issues you may encounter with the portal(s).

Portal Installation

"Server Not Found" Error

During the portal installation, when you specify the user name and password of the application pool logon account, you might see this message: "Server not found. Verify that the specified server exists. The server name cannot be empty."

If you see this message, start the Computer Browser service before trying again to specify the user name and password. This service can be started from the command line (when using CMD with administrator privileges) by running the following: `sc start browser`.

For more information about this message, search the Microsoft Knowledge Base for article 875362.

Can't Complete Installation

If the portal installation fails, it may be because your Internet Information Services (IIS) options for enabling 32-bit applications are set to True. For portal installations, these options must be set to False. For more information, see the note at the beginning of "Installing the Portal(s) and Portal Manager" on page 35.

Also, if the portal installation wizard fails to finish and no option is provided for opening the installation log file, then in order for Infor support to diagnose other problems, you will need to force creation of the log file. From the command line, run the following: `SL 9.00 Portal Install IPF 3.1 Build 70.exe /v"/l*v c:\test.log"`

Update Conflict Error

If the portal installation fails on SharePoint 2.13, check the log file for an error message similar to this: "An update conflict has occurred and you must re-try this action. The object SPWebApplication Name=<name> is being updated by DomainName\UserName1, in the OWSTimer.exe process, on machine <servername>. View the tracing log for more information about the conflict."

If you see such a message, refer to Microsoft KB article 939308.

Cleaning Up After Portal Installation Failure

If the **`SL 9.00 Portal Install IPF 3.1 Build 70.exe`** installation wizard fails to complete successfully and there is no entry for **Infor Portal Foundation** in the Control Panel, Programs and Features area, use these steps to manually uninstall any components that might have been installed:

1. In SharePoint Central Administration, select **System Settings**.
2. Select **Manage servers in this farm**.
3. Retract and remove each of the following solutions. Select one of the solutions, which takes you to the Solution Properties screen. In that screen, select **Retract**. After the retraction is complete, select the solution again. On the **Solution Properties** screen, select **Remove Solution**.
   - ipf.centraladminconfig_v3.0.0.0.wsp
   - ipf.manager_v3.0.0.0.wsp
   - ipf.webparts_v3.0.0.0.wsp
4. In SharePoint Central Administration, select **Application Management**.
5. Select **Manage web applications**.
6. Delete the portal Web applications. When you delete the Web application:
   - Select **Yes** to delete the content databases.
   - Select **Yes** to delete the IIS Web sites.
7. Remove the following DLLs from the Global Assembly Cache (GAC). If you have installed multiple versions of the SyteLine Portals, be careful to remove files for only the portal version you are uninstalling. To access the GAC, click **Start > Run** and enter `C:\windows\assembly\gac_msil`.
   - compiler
   - FusionCharts
   - IKVM.OpenJDK.Core
   - IKVM.OpenJDK.Text
   - IKVM.OpenJDK.Util
   - IKVM.Runtime
   - IPF.CentralAdminConfig
   - IPF.CustomCodeLib
   - IPF.InternalCustomCodeLib
   - IPF.LoggingLib
   - IPF.Manager
   - IPF.Oracle
   - IPF.SharedCode
   - IPF.WebParts
   - Mongoose
   - Newtonsoft.Json
   - zxing

   NOTE: If any of the files are locked, stop SharePoint services, delete the files, and then restart the services.

8. Delete the portal and links from the desktop.
9. Delete the installation files, which by default are copied to `C:\Program Files\Infor`.
10. Restart the SharePoint Administration and SharePoint Timer services.
11. To restart IIS, run the **iisreset** command.

Portal Configuration

Can’t Connect to SyteLine for Data Source Configuration

This problem may occur if you have installed SharePoint and SyteLine on the same utility server. By default, both applications will have a binding on port 80. To resolve this conflict, you must delete the default SharePoint Web application. Follow these steps:

1. Log in to the SharePoint server using the account you used for installing SharePoint.
2. In SharePoint Central Administration, select **Application Management > Manage web applications**.
3. In the list of Web applications, select **SharePoint - 80** and then click **Delete**.

Access Denied During Push to STS

During portal configuration, when you push the configuration changes to the Security Token Server (STS), there may be an “Access Denied” message at the top of the page, if your browser is running on the SharePoint server.

If you see this message, close the browser and re-open it with administrator privileges (**Run as administrator**). Perform the push to STS again.

The problem may also occur if you are not logged in to the machine as the same account user that SharePoint Central Administration is running under. See “Set Up User Accounts for SharePoint” on page 25 for log in information.

Error Processing an IDO Request

“Error processing an IDO request... (Status:TrustFailure The remote certificate is invalid according to the validation procedure.)”

This message is displayed during portal configuration if you attempt to connect to the configuration server using a URL that starts with https, but a valid digital certificate is not installed and bound to the portal Web application.

In a test environment, you might use an SSL certificate that is self-signed or that is signed using the internal or private key. You can temporarily configure the system to ignore the lack of a valid certificate and trust relationship for the SSL/TLS secure channel by selecting the **Ignore Invalid Security Certificate** check box during portal configuration. See “Configure Data Sources” on page 42.

Pre-Login Account Errors

During configuration of the pre-login account, if you receive an error saying that the pre-login account does not exist or can't authenticate, even though it is configured correctly in SyteLine, it may be that SSL is not successfully authenticating its certificates.

To verify this issue, open the Portal Manager and select **Configuration > Data Sources**. Select the **Ignore Invalid Security Certificate** option. Apply this setting, push to STS, and then try configuring the pre-login account again. If it now succeeds, there is a problem with the SSL certificates.

Portal Login

Can't Log In Using the SharePoint Server Machine

If you are trying to log in to the portal using Windows authentication on the SharePoint server machine, and the **Public URL** for the portal is *not* the server machine name, you may encounter a problem with SharePoint that prevents you from logging in. You will need to specify the host names that are mapped to the loop back address and that can connect to Web sites on the local computer. Follow these steps:

1. Click **Start > Run**, type regedit, and then click **OK**.
2. In the Registry Editor, locate the following registry key:

```
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Lsa\MSV1_0
```

3. Right-click MSV1_0 and select **New > Multi-String Value**.
4. For the new value, type BackConnectionHostNames, and then press `Enter`.
5. Right-click BackConnectionHostNames and select **Modify**.
6. In the **Value data** field, specify the host name(s) used in the request URL for the sites that are on the local computer, and then click **OK**. For example, PortalAdmin.MyCompany.com.
7. Close the Registry Editor and then reset IIS.

Can't Log In Using Forms Authentication

If you try to log in to the portal using Forms Authentication but receive an error that the v2.1.0.0 IPF Manager.dll could not be loaded, you need to remove old entries from the STS web.config file. Follow these steps:

1. Using Notepad, open the web.config file stored in this location: `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\WebServices\SecurityToken`.
2. In the `<configuration><connectionStrings>` section, remove all of the `<add>` tags with a name attribute that begins with SyteLineMembershipProvider v2.1.0.0 (for example, to SyteLineMembershipProvider v2.1.0.0s1, to SyteLineMembershipProvider v2.1.0.0s2, and so on).

3. In the `<configuration><system.web><membership><providers>` section, remove all of the `<add>` tags with a name attribute that begins with SyteLineMembershipProvider v2.1.0.0.
4. In the `<configuration><system.web><membership><roleManager>` section, remove all of the `<add>` tags with a name attribute that begins with SyteLineRoleProvider v2.1.0.0.
5. Save the file.

Temporary Profile Error

If account profiles were not created for the SharePoint user accounts (SPInstall, SPFarm, and SPServices) before portal installation, then this message may appear in portal diagnostics when you try to access the portal: "The profile for the user is a temporary profile."

To fix this issue, you must first remove the temporary profile that was created. Do this by deleting the TEMP directory from C:\Users. Then create the account profiles as explained in “Create Account Profiles” on page 27. After the profiles are created, you can log in to the portal without getting this error.

User Login Errors

Portal users may receive the following login error message: “Login Error. Try again”.

For some login errors, the event can be seen in portal diagnostics if diagnostics is running when the error occurs. If a user reports this problem, you may need to start diagnostics and then log in to the portal with that user’s credentials to troubleshoot the issue. These errors occur when:

- The user is a super user
- The user is not associated with a customer or vendor
- The user is associated with more than one customer or vendor
- The user is not associated with the Customer Portal or Vendor Portal group

For unexpected errors, an event is logged in portal diagnostics even if diagnostics is not running. The portal user gets the same message. These errors occur when:

- A stored procedure call fails
- A stored procedure call returns an error message
- A collection load fails

See Chapter 14, “Using Portal Diagnostics” for more information.

Access Denied Errors for Logged In Users

If users report “Access Denied” errors on various portal pages *after* they have successfully logged in, follow these steps in the order shown:

1. Re-run the Push to STS. See “Pushing Portal Configuration Changes for a New Server in the Farm” on page 127.
2. Re-apply all portal group permissions. See “Set User Group Permissions in SharePoint” on page 48.
3. In Portal Manager, select **Configuration > General** and then click the **Reset Pre-Login Permissions** button.

Diagnostics Viewer Error

If you try to start the portal Diagnostics Viewer, but you receive server connection errors, it may be that your current Windows login ID needs administrator rights on the SharePoint server(s).

Updates in SyteLine Not Displayed on the Portal

If you have made changes in SyteLine that should affect images or text displayed on the portal, but those changes are not showing up on the portal, you may need to clear the cache, as described in “Clearing the Portal Cache” on page 126.

Also, if you have more than one server in a SharePoint farm, and you have made changes to an IPF Display Layout or IPF Field Display Format, the cache is automatically cleared on only the machine to which the updated component was loaded. You will need to clear the cache for the other machines in the SharePoint farm.

Category Name Displayed Multiple Times on Products Page

If you see the same category name displayed more than one time on the Products page, you may have an issue with Language IDs in SyteLine.

Each language record in SyteLine should have only one LocaleID. If there is more than one LocaleID for a language, and during portal configuration you specified that language to be supported on the portal(s), then category names on the Products page will be displayed for each LocaleID in the SyteLine record.

Top Sellers Are Not Displayed on Portals

If you have set up items to be active for the portal and also to be displayed as top sellers, but they do not appear as top sellers on the Home page or Top Sellers page, make sure you have set all applicable currencies to be active for the portal (on the **Currency Codes** form) and that you have activated portal pricing for those currencies. See “Activating Prices for the Portals” on page 74.

Maintenance Icon Not Displayed for User with SharePoint Design Permissions

Some modal pages in the portal, or new pages added during portal customization, may not include the maintenance icon even if you have Design permissions. This can happen if the page doesn’t include the ToggleAdmin Web Part or field display format. In these cases, you can still access the SharePoint ribbon by adding this to your page URL: `?IPFDisplayRibbon=1`. For example: `<SharePoint Server Name>:8084/IPFSitePages/NewPage.aspx?IPFDisplayRibbon=1`.

Verifying Log Files

You can use portal diagnostics to verify log files. See Chapter 14, “Using Portal Diagnostics” for more information.

Optionally, you can use the Windows event log. The portal writes application messages to the Windows event log. The message source is either **Infor Portal Foundation v3.0.0.0** or **IPF Portal Application v3.0.0.0**, depending on the message. Event messages with a severity of **Error** or **Error Critical** are written to the log when one of these conditions is encountered:

- Coding error
- Incorrect configuration
- System down condition

Event messages with a severity of **Informational** are written to the log when one of these conditions is encountered:

- Deployment
- Clear Cache
- Update STS Web Config

If you suspect that logging is not working correctly, verify that the logging configuration is set up properly by following these steps:

1. In SharePoint Central Administration, select **Monitoring > Reporting > Configure diagnostic logging**.
2. Verify that the Infor Portal Foundation and IPF Portal Application categories are not displayed in bold.
3. Expand these categories and verify that the Event Level is **Information** and the Trace Level is **Medium**.

4. If the categories are in bold or the subcategories do not have the Event Level or Trace Level listed above, follow these steps to correct the problem:
   a. Check the Infor Portal Foundation and IPF Portal Application categories:
      - In **Least critical event to report to the event log**, select **Reset to default**.
      - In **Least critical event to report to the trace log**, select **Reset to default**.
   b. Click **OK** at the bottom of the page to save these changes

NOTE: If you change the Trace Level to **Verbose**, more information is logged in the SharePoint log file, which is typically located in `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14`. This verbose information is for Infor debugging use only and is not meant to be understood by customers.

Portals: Behind the Scenes

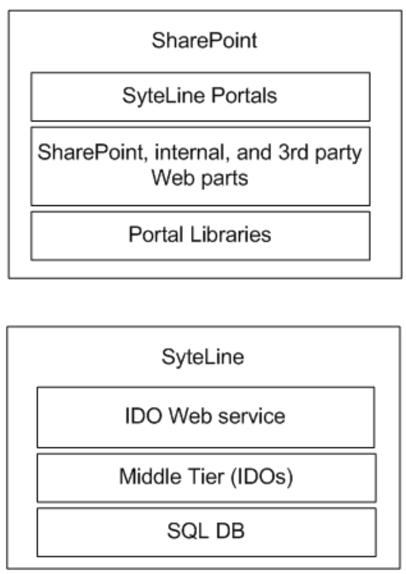
A

This appendix describes how the parts of the portal interact with SyteLine. It is divided into these sections:

- System architecture
- Login process and security
- Internationalization
- Displaying pages of information
- Using pictures

System Architecture

The portal architecture is a combination of SharePoint and SyteLine elements.



On the SharePoint side:

- The SyteLine portal user interface is in SharePoint. The user interface uses ASPX pages, Web Part, and ASP.NET controls.
- SharePoint internal and third-party Web Parts are used to present lists, and to get current signed in user, authentication methods, and so on.

- The interface also takes advantage of SharePoint portal libraries to connect SyteLine to the SharePoint ASP .NET pages, and to implement single sign on, access to SyteLine data through IDOs, and to ensure that inserts, updates, and deletes are restricted to the correct customer.

On the SyteLine side:

- Account-specific data, also known as IDO filtering, restricts the data that is retrieved from collections by the customer.
- The SyteLine architecture used by the portal includes the IDO server and the SQL database.

SharePoint Login Process and Security

Your external customers sign in to the portal using a SyteLine user ID and password. The portal services use claims-based authentication for user logins. The portal site uses a custom implementation of forms-based authentication built on SyteLine user names.

This approach uses the SharePoint Forms Based Authentication method. The SyteLineMembershipProvider that is delivered and installed with the portal validates the portal login against the user ID and password in the SyteLine application.

The portal administration site can use either Windows or Forms-based authentication; however, we recommend that you use Windows authentication to access this site.

How the Login Works

During the installation process, the external/Internet SharePoint Web application is configured to use `/_layouts/IPF.Manager_v3.0.0.0/IPFLogin.aspx` as the login page. This page uses the pre-login account, created in SyteLine and specified during portal configuration, to log in to SyteLine. When the user arrives at this page, they are automatically authenticated into the SharePoint Web application using this pre-login account and then redirected to a custom login page with a user interface appropriate for the portal. The custom login page must be named `/IPFSitePages/Login.aspx` and needs to use the `<Authenticate/>` tag on a button to complete the login process. (Refer to the IPFButton formatter in the *Infor Portals Customization Guide* for a description of how to create a login button.)

When a user clicks the **Login** button on the `/IPFSitePages/Login.aspx` page, authentication processing is executed using the information configured by the button. If authentication is successful, the currently signed in user is changed from the pre-login account to the newly authenticated account.

The pre-login account should be limited by having permissions to only those pages that can be accessed prior to login. The Web Parts on these pages, however, run with elevated permissions and have full access to any resource on the portal.

Page sets that should be accessible to the pre-login account are defined using the Page Sets feature in Portal Manager. Refer to the *Infor Portals Customization Guide* for more information.

If a user is not signed in to the portal but tries to access a portal page directly, for example, from a bookmark or a link received by e-mail, the following occurs:

A. A redirect is done by SharePoint to the login page `http://portal.com/_layouts/IPF.Manager_v3.0.0.0/IPFLogin.aspx`.
B. The `IPFLogin.aspx` page performs an “auto login” using the pre-login account and then redirects to the custom login page `http://portal.com/IPFSitePages/Login.aspx`.
C. The `Login.aspx` page processes the custom login and then redirects on to the originally requested URL
D. In the Click() handler, when using the field display format for IPFButton with the `<Authenticate/>` tag, the custom code can override that last redirection, if desired, by using the NavigateTo() and NavigateToSitePage() methods.

Login processing is performed using the SyteLineMembershipProvider delivered with the portal installation. The Microsoft SecurityTokenService (STS) validates:

- The user ID and password against the default SyteLine data source using the delivered SyteLineMembershipProvider.
- SyteLine licensing against the default data source.
- The UserAuthenticated event handler. If the custom UserAuthenticated event handler returns false, the login fails.

Alternative login methods

When there is a custom MembershipProvider configured on the Web application, STS validates the user ID and password as specified in the custom MembershipProvider.

When a user that has authenticated with either the custom MembershipProvider or with Windows authentication attempts to access a portal page, the following validation is required before accessing the page:

- The user ID and password as specified in the custom MembershipProvider.
- There exists a user in SyteLine with a Domain/WorkstationID for this user ID.
- SyteLine licensing.
- The UserAuthenticated event handler. If the custom UserAuthenticated event handler returns false, the login fails.

NOTE: Infor does not supply or provide coding support for custom MembershipProviders.

When NOT using the provided IPFLogin.aspx page followed by an `<Authenticate/>` tag on the custom log in page, the following occurs:

A. Windows Authentication:
    - Windows/STS performs the User ID and password validation
    - At the first attempt to access a page that contains an Infor Portal Foundation Web Part, the following additional steps are performed:
        - Validates SyteLine licensing against the default data source.
        - Calls the UserAuthenticated event handler. If the custom UserAuthenticated event handler returns false, access to the Web Part is denied.

B. Forms Authentication:

- STS does validation using the specified MembershipProvider. This will be the SyteLineMembershipProvider if the delivered MembershipProvider is used.
- At the first attempt to access a page that contains an Infor Portal Foundation Web Part, the following additional steps are performed:
  - Validates SyteLine licensing against the default data source.
  - Calls the UserAuthenticated event handler. If the custom UserAuthenticated event handler returns false, access to the Web Part is denied.

Filtering Data by Login

The SyteLine data that the portal user can see is limited to information for the SyteLine customer to which the portal user is linked. This is handled by:

- Linking the user to a customer on the **Customer Users** form in SyteLine.
- Predefined filters that are set on the **Row Authorizations** form in SyteLine. These filters limit the data that a customer user can view. See the help topic “Using IDO Filters to Limit User Access” if you want to better understand how this works.

WARNING! By default, the **Active** check box is selected for all Infor-provided filters that are defined on the **Row Authorizations** form. If you turn off the **Active** check box for a filter, then any user who was previously restricted by the filter is no longer restricted. For example, if you turn off the Infor-provided filters that are set on the Interactions IDO, then any portal user can see ALL interactions in the system, not just the ones related to that customer or vendor.

Internationalization

This section covers translations and the formatting of currency, dates, and numbers for different languages, locales, or regions.

Supported Languages and Regions

When you configure the portal site, you choose from a list of locales (cultures with regions), that the SyteLine installation supports. A culture with region is a culture that specifies both a language and a region; for example, **en-US** is English for the United States. A culture without region specifies only a language; for example, **fr** is French. In order to use a culture to control the formatting of numbers, currency, and dates, it must include a region, as in our en-US example. For translations of labels, a culture can omit the region, as in our **fr** example.

The Web Part lists cultures with regions that SyteLine can support. The portal administrator selects all the cultures with regions that your portal site will support. The portal administrator also chooses one of the culture/regions as the default for the site. If no configuration is performed, the site defaults to the en-US culture/region. The configuration of the portal languages is described in “Set General Configuration Options” on page 45.

Using Browser Language Preferences

When a portal user first visits the site, the portal looks at the language preferences contained in the user's Web browser. The portal selects the best match against the list of culture/regions that the portal site is configured to support.

If no exact match is found, look for the first match on the language (that is, the first two characters of the culture name). For example, if the browser has **en-NZ** as its only entry, and the portal supports en-US, then select en-US as the culture/region for the portal.

If no language match is found, then select the default locale (culture/region) that was specified by the portal administrator during portal configuration.

The portal uses this culture/region name for text translations and for the formatting of numbers, dates, and currency.

Overriding Browser Preferences

On the portal login page, the user can select a different culture/region from a drop-down list. The list includes all cultures with regions that you configure the portal site to support.

If a portal user makes a selection from this menu, a cookie is created to remember this selection. The value in this cookie overrides the browser selections.

The portal uses this culture/region name for text translations and for the formatting of numbers, dates, and currency.

Currency Symbol

As described above, the selected culture controls the formatting of numbers, dates, and currency. The culture also controls the currency symbol. However, the currency values returned from SyteLine are in the currency that is defined for the customer record.

To resolve this, after the culture has been set based on the rules defined above, the currency symbol is overridden to be the symbol for the currency defined on the SyteLine customer record. (This must be an ISO currency.)

Customer Portal Page Architecture and Mapping to SyteLine

B

This appendix describes how Customer Portal pages are mapped to SyteLine forms to display SyteLine data online.

Account Balance Page

This page contains information similar to that on the SyteLine **A/R Posted Transactions Summary** form. The account balance information for your customer includes balances for the customer's subordinate customers, if any.

The page includes these calculated fields:

- **Current Balance** is the customer's On-order Balance plus Posted Balance.
- **Available Credit** is the customer's Credit Limit minus the Current Balance.

The "aging bucket" text labels that display over the first five fields on the portal Account Balance page are set from the values entered on the SyteLine **Accounts Receivable Parameters** form. These text values are not tied to a specific language and must be language-independent, as described in "Setting Up Language-Independent Aging Bucket Labels" on page 63.

The portal page displays all A/R transactions (such as invoices and payments) for this customer where the **Active** field is selected on the **A/R Posted Transactions Detail** form.

NOTE: In multi-site implementations, if the Customer Portal site group contains different sites than the Accounts Receivable site group, data on the Account Balance page will not equal that shown in SyteLine and may not represent accurate customer aging information. For more information, refer to the *Multi-Site Planning Guide*.

Account Management Page

My Company Information

The fields in the Company Information section are mapped to fields on the SyteLine **Customers** and **Customer Ship-Tos** forms.

Billing Information

This information is taken from the **Customers** form.

Shipping Information

This information is taken from the **Customers** and **Customer Ship-Tos** forms.

Payment Information

This information is taken from the **Customers** form.

User Profile Information

The portal user can edit information in this section, other than the user ID, and the changes take effect immediately. Fields are mapped as follows:

- The **User ID**, **Name**, and **E-mail Address** fields on this page are mapped to fields on the SyteLine **Users** form.
- If the portal user selects **Confirmations**, the **Send External Notifications** field on the SyteLine **Users** form is selected for this user. The system will send event notifications to the specified e-mail address as well as to the portal Inbox page.
- If a portal user chooses to receive e-mails for any other option listed, SyteLine adds that user to the SyteLine **Publication Subscribers** form with the appropriate publications.
- If the portal user is added as a subscriber to the SpecialPromotionsAnnoucements publication, then when a SyteLine user uses the **Communication Wizard** form to send a communication with the **Portal Users** field selected, this user will receive the communication as an e-mail.
- If the portal user is added as a subscriber to the OrderShippingAlert publication, a stored procedure in SyteLine periodically checks for orders that have shipped. (You can set this test interval as described in “Configuring Order Shipping Alerts” on page 67.) If an order has shipped for a customer whose portal user has subscribed to the OrderShippingAlert publication, then another stored procedure triggers the Alert on Order Shipping workflow event handler, which sends an e-mail to the portal user.

Change Password

The **Password** field is mapped to the **Password** field on the SyteLine **Users** form.

Announcements Page

Announcements are added in SharePoint. See “Add Announcements” on page 122.

Consigned Inventory Page

If no search parameter is selected, the Consigned Inventory page displays all of the logged-in customer's consigned items. The details grid on the Consigned Inventory page contains data from the following SyteLine forms:

- **Item**: The customer item number from the SyteLine **Customer Contracts** form, or the SyteLine item number from the **Items** form for the signed in customer.
- **Description**: The item description from the SyteLine **Items** form.
- **Facility**: The customer ship-to name from the SyteLine **Warehouses** form.
- **Min Qty**: The lower boundary set for managing inventory quantities at a consignment warehouse for a specific item, from the SyteLine **Item/Warehouse** form.
- **Max Qty**: The upper boundary set for managing inventory quantities at a consignment warehouse for a specific item, from the **Item/Warehouse** form.
- **On Hand Qty**: Inventory on hand at a consignment warehouse for a specific item, from the **Item/Warehouse** form.
- **Pending Qty**: Quantity required minus quantity received for consignment transfer order lines for this consignment warehouse and item combination, from the **Inventory Consigned To Customer** form.

Contact Us Page

The Contact Information section on this page (name, address, phone, and e-mail) is mapped to information on the SyteLine **General Parameters** form.

In the Salesperson Contacts section, the customer Ship To addresses (city, state, country) and salesperson contact information (contact name, phone, e-mail) are mapped to fields on the SyteLine **Customer Ship-Tos** form.

Signed in portal users see information in both of these sections. Users who have not signed in see information in only the Contact Information section.

If an e-mail address is provided on the **General Parameters** form, all users can click **Send Questions or Comments** on this page, which opens a default e-mail client so they can send their messages.

Contract Order Page

If no search parameter is selected, this page displays all contracted items for the signed in customer. Information on this page is taken from the SyteLine **Items**, **Multi-Lingual Items**, **Customer Contracts** and **Customer Contract Prices** forms.

Documents Page

If no search parameter is selected, the Documents page displays all customer documents uploaded by a SyteLine customer service representative that are accessible to the logged-in portal user, and all documents uploaded by the portal user and approved in SyteLine by a customer service representative.

The details grid on the Documents page contains information from the SyteLine **Documents** form for documents added in SyteLine, and from the Document Upload form for documents added via the portal.

NOTE: To view documents related to other types of SyteLine records, portal users must click the Documents icon displayed with an individual record on the related portal pages.

Estimates Page

The summary information on this page (estimate, quote date, status, total price, and Expiration Date) is mapped to fields on the SyteLine **Estimates** form.

The detail information for each estimate is mapped to fields on the SyteLine **Estimate Lines** form.

Featured Products Page

This page displays any products that have been set up on the SyteLine **Items** form as featured items and active for Customer Portal.

Home Page and Menus

The logo, text and pictures on the Home page are configurable and should be changed to personalize your portal. See Chapter 9, “Personalizing the Portal(s)”.

The language box displays only those languages that you enabled in the Supported Locales area during portal configuration. See “Set General Configuration Options” on page 45.

There are no fields mapped to SyteLine forms. There are a few menu text strings that are stored in SyteLine, and there is one text object and several images that are stored in SharePoint. You can hide links to menu options for which you are not providing pages.

Inbox Page

The Inbox page contains messages generated by the SyteLine event system, as described in “Setting Up Customer Event Notifications” on page 64. Portal users can view these messages using the Inbox page, similar to the way SyteLine users can view their event-driven messages using the SyteLine **Inbox** form.

Interactions Page

If no search parameter is selected, the Interactions page displays all interaction records for the customer. The records may have been created by a customer service representative using SyteLine or by the customer using the portal.

The details grid on the Interactions page contains information from the SyteLine **Customer Interactions** form for records added in SyteLine, and from the Interactions page for interactions added via the portal. In multi-site implementations, the Interaction ID in the grid includes a site code to identify which site the interaction relates to.

Inventory Page

This page displays items from the SyteLine **Items** form that are active for the portal and that have an associated customer contract.

Invoices Page

If no search parameters are specified, the page displays all invoices for the customer. Invoices are sorted by the due date, in descending order (latest first). The fields on the Invoices page are mapped to fields from SyteLine reports.

A portal user can select one or more invoices by selecting the check box. After selecting invoices, the portal user may be able to click **Request** to request a reprint of the selected invoices to be e-mailed. See “Allowing Customer Portal Users to Reprint Invoices” on page 63.

Each selected invoice is sent as a separate request. The task to be initiated is based on the bill type of the invoice and is handled by the ReprintInvoiceSp stored procedure:

Bill Type	Code	Background Task used
Invoices, credit memos, and progressive billing invoices	N, P, or R	OrderInvoicingCreditMemoReportLaser
Project invoices	J	ReprintProjectInvoicesReportLaser
Invoices or credit memos posted from Accounts Receivable	A	ARInvoiceCreditDebitMemoLaser

Bill Type	Code	Background Task used
RMA credit memos	M	RMACreditMemoLaser
Consolidated invoices	C	ConsolidatedInvoicingLaser

Knowledge Items

Press Releases, Videos, White Papers, Knowledge Base, and FAQ

The maintenance of these pages, which are accessed by selecting **Activity > Knowledge Items**, is handled entirely through the SharePoint portal administration site. See the appropriate section in Chapter 10, “Administration Tasks”.

Login Page

The User ID and Password must belong to a user who is set up in SyteLine according to the instructions in Chapter 7, “Setting Up and Managing SyteLine User Accounts for the Portal(s)”.

If the user clicks on the **Forgot User ID or Password** link, a pop-up message tells them to contact your company for assistance. It provides a link to the Contact Us page.

Order Status Page

Most fields on the Order Status page are mapped to fields on the SyteLine **Customer Orders** and **Customer Order Lines** forms.

The order status shown on the portal is either Ordered or Shipped. There is no equivalent “Shipped” status in SyteLine; the “Shipped” status is displayed on the portal when the SyteLine order status is “Complete” or when all order lines for the order have a status of “Filled.” Orders with a status of “History,” “Stopped,” or “Planned” are not shown on the portal.

Tracking information that can be accessed on this page is taken from the SyteLine **Shipment Master** form.

Portal users can enter either your company’s item number or their customer item number, if applicable, in the Item search box on the portal Order Status page. The drop-down list for the Item displays the item number and the item description. If an description is available in the chosen portal language, the description from the SyteLine **Multi-Lingual Item** form is displayed in the drop-down list. Otherwise the description text is displayed in the default language of the site to which the portal is connected.

Place Order Page

Quick Order

The **Item** field in this section displays items in the Primary Site that are defined using the SyteLine **Items** form. Only items that have a price are displayed in the Quick Order **Item** field.

Order

When items are initially added to an order, an order estimate is created in SyteLine. When a shipping address is entered on this page, the estimate is converted to an order with a status of Planned in SyteLine.

The order section of the page displays the items that have been placed on the estimate or order by the customer. The item picture, number, and name are taken from the SyteLine **Items** form. The item price is taken from the **Portal Pricing Review** form. Quantity ordered is displayed in the customers unit of measure, which is taken from the **Customer Contracts** form.

If the Credit Card Interface (CCI) is installed and active, the tax amount is displayed. It is a calculated value, from the **Estimates** or **Customer Orders** form.

Sign In/Register

For returning customers, the login user ID and password are validated against the users information on the SyteLine **Users** form.

For new customers, their registration information is added to the SyteLine **Users**, **Customers**, and **Customer Users** forms.

Shipping Information

This information is taken from the **Customer Ship-Tos** form.

Order Information

Order Contact and Phone are taken from the **Customers** form.

Ship Method information can come from different sources. When orders are paid on account, the ship methods are taken from the SyteLine **Ship Via Codes** form, if on that form they have been activated for use on the portal. The ship code can be tied to a carrier coming from the **Carriers** form.

When orders are paid by credit card, the ship methods are taken from the ship method group assigned to the customer on the **Customers** form. If no group was assigned, then the default ship method group from the **Portal Parameters** form is used. The following forms are all involved when a ship method is created in SyteLine for credit card orders: **Ship Method Groups**, **Ship Methods**, **Multi-Lingual Ship Methods**, **Freight Charge Methods**, **Customer**, **Items**, and **Portal Parameters**.

Finalize Order

When a customer opens the Place Orders page, validation of the SyteLineinstallation is made to see if SyteLine Credit Card Interface (CCI) is being used to allow for credit card ordering. If so, for B2C users and for B2B users who pay by credit card, the Credit Card Information section is enabled and CCI parameters are taken from the SyteLine **Credit Card Interface Parameters** form.

For customers who have credit card information already saved in SyteLine, that information is taken from the **Customer Credit Cards** form and displayed on the portal. For customers who enter their credit card information on the portal, that information is added to the **Customer Credit Cards** form, and the **Portal User** field displays the name of the portal user who entered the data.

If CCI is not being used, then Credit Card Information is not enabled.

Billing Address comes from the **Customers** and **Customer Ship-Tos** forms.

Order Total comes from the **Orders** form.

The e-mail address that a copy of the order is sent to comes from the **Primary E-mail Address** on the **Users** form.

Product Details Page

The portal Product Details page displays the item number, description, and pictures from the SyteLine **Items** form. The customer's item number is shown, if available. If there is no customer item associated with this customer and item, then your standard item number is displayed. Also, if a multi-lingual item overview does not exist in the SyteLine **Multi-Lingual Item** form for the selected item, then the standard item overview from the **Items** form is returned instead.

Pricing information comes from the SyteLine **Customer Contract Prices** form and is displayed only if **Portal Pricing Enabled** and **Pricing Site** are set on the **Items** form.

Products Page

The initial Products page displays all items that are marked as active for the portal on the SyteLine **Items** form. Users can filter by category or item.

The page also displays the item number, description, and pictures from the SyteLine **Items** form. Pricing information comes from the SyteLine **Customer Contract Prices** form and is displayed only if **Portal Pricing Enabled** and **Pricing Site** are set on the **Items** form.

The category hierarchy shown on the left side of the page is taken from the **Item Category Workbench** form. Category names and pictures are from the **Item Categories** form.

Returns Page

The fields on the Returns page map to fields on the SyteLine **RMAs** and **RMA Lines** forms. Only RMAs with a status of Opened or Requested are displayed on the portal page.

A request to submit a new RMA request takes these steps:

1. The submitted RMA request causes a stored procedure to run. The stored procedure uses the information it was given by the portal (customer number, username, item, customer item, quantity, customer order number, line number, release number, invoice number, and reason) to create an RMA and RMA line in SyteLine with a Requested status.
2. The submitted request triggers the workflow event handler Notify Portal RMA Request Created, which sends a message to the SyteLine user specified in the **Notify Users** field of the workflow event handler.
3. The SyteLine user must go to the **RMAs** form to approve or reject the RMA, by changing the status to Opened or Stopped.
4. The change to the status triggers one of these workflow event handlers:
   - Notify Portal RMA Approved, which sends a notice to the portal user that the request was approved, or
   - Notify Portal RMA Rejected, which sends a notice to the portal user that the request was rejected.

If the portal user selects an existing RMA with a status of Requested and clicks **Cancel Request**, the RMA in SyteLine has its status set to Stopped.

If an item in an RMA does not have a multi-lingual item description set up, then the description from the **RMA Lines** form is displayed instead. The RMA Lines description is likely to be in the default language of the site to which the Customer Portal is connected.

Service Incidents Page

Information displayed on the Service Incidents page comes from the **Incidents** form.

Service Knowledge Base Page

Information displayed on the Service Knowledge Base page comes from the **Knowledge Base** form.

Top Sellers Page

This page displays any items that have been set up on the SyteLine **Items** form as top sellers and active for Customer Portal.

Unit Registration Page

On the Unit Registration page, **Unit**, **Item**, and **Description** are taken from the **Units** form. **Prov/State** codes are taken from the **Prov/State** form, and **Country** codes are taken from the **Countries** form.

Reseller Portal Page Architecture and Mapping to SyteLine

C

This appendix describes how Reseller-only portal pages are mapped to SyteLine forms to display SyteLine data online.

Commissions Due Page

The information displayed on this page is taken from the SyteLine **Commissions Due** form. In the **Status** field on this page, Unpaid maps to the SyteLine Pay status, Hold maps to the SyteLine Hold status, and Paid maps to the SyteLine Complete status.

Customers Page

If no search parameter is selected, this page displays all customers associated with the logged in reseller. This association is taken from the SyteLine **Customer Ship-Tos** form, **Salesperson** field. Customer information is taken from the SyteLine **Customers** form.

Service Order Transactions Page

Information displayed on the Service Order Transactions page comes from the **Service Order Transactions** form.

Service Orders Page

Information displayed on the Service Orders page comes from the **Service Orders** form.

Vendor Portal Page Architecture and Mapping to SyteLine

D

This appendix describes how Vendor Portal pages are mapped to SyteLine forms to display SyteLine data online.

Announcements Page

Announcements are added in SharePoint. See “Add Announcements” on page 122.

Consigned Inventory Page

If no search parameter is selected, the Consigned Inventory page displays all consigned items from the logged-in vendor. The details grid on the Consigned Inventory page contains data from the following SyteLine forms:

- **Item**: The vendor item number from the SyteLine **Vendor Contracts** form, or the SyteLine item number from the **Items** form for the signed in vendor.
- **Description**: The item description from the SyteLine **Items** form.
- **Min Qty**: The lower boundary set for managing inventory quantities at a consignment warehouse for a specific item, from the SyteLine **Item/Warehouse** form.
- **Max Qty**: The upper boundary set for managing inventory quantities at a consignment warehouse for a specific item, from the SyteLine **Item/Warehouse** form.
- **On Hand Qty**: Inventory on hand at a consignment warehouse for a specific item, from the SyteLine **Item/Warehouse** form.

Values for calculating past consumption are also taken from the SyteLine **Item/Warehouse** form and based on the start and end dates specified by the user.

Contact Us Page

The Contact Information section on this page (name, address, phone, and e-mail) is mapped to information on the SyteLine **General Parameters** form.

When the portal user submits text in the Questions or Comments box, a stored procedure reads the text in the box and passes it as a parameter in a “Send e-mail” event message that is sent to the e-mail address defined on the **General Parameters** form. This process uses the “Send Portal Question/Comment E-mail” workflow event handler. If no e-mail address is entered on the **General Parameters** form, then the Questions or Comments box on the portal page is not displayed, because there is no way to send a message.

Documents Page

If no search parameter is selected, the Documents page displays all vendor documents uploaded by a SyteLine vendor service representative that are accessible to the logged-in portal user, and all documents uploaded by the portal user and approved in SyteLine by a vendor service representative.

The details grid on the Documents page contains information from the SyteLine **Documents** form for documents added in SyteLine, and from the Document Upload form for documents added via the portal.

Home Page and Menus

The logo, text and pictures on the Home page are configurable and should be changed to personalize your portal. See Chapter 9, “Personalizing the Portal(s)”.

The language box displays only those languages that you enabled in the Locale Settings area during portal configuration. See “Set General Configuration Options” on page 45.

There are no fields mapped to SyteLine forms. There are a few menu text strings that are stored in SyteLine, and there is one text object and several images that are stored in SharePoint. You can hide links to menu options for which you are not providing pages.

Inbox Page

The Inbox page contains messages generated by the SyteLine event system, as described in “Setting Up Vendor Event Notifications” on page 93. Portal users can view these messages using the Inbox page, similar to the way SyteLine users can view their event-driven messages using the SyteLine **Inbox** form.

Interactions Page

If no search parameter is selected, the Interactions page displays all interaction records for the vendor. The records may have been created by a vendor service representative using SyteLine or by the vendor using the portal.

The details grid on the Interactions page contains information from the SyteLine **Vendor Interactions** form for records added in SyteLine, and from the Interactions page for interactions added via the portal.

Inventory Level Projection Page

This page displays data from the SyteLine **Inventory Levels** form for the logged-in vendor's contracted items. It also uses Plan Horizon (days) from the SyteLine **Planning Parameters** form for the default start and end dates.

This form uses an item category filter, which displays data only if an item, category, and vendor association is made using the SyteLine **Item Categories** form.

Item Price Requests Page

This page displays item price requests data from the SyteLine **Item Price Requests** form for the logged-in vendor.

Only items that have a category assigned and are associated with the logged-in vendor are displayed.

Knowledge Items

Press Releases, Videos, White Papers, Knowledge Base, and FAQ

The maintenance of these pages, which are accessed by selecting **Activity > Knowledge Items**, is handled entirely through the SharePoint portal administration site. See the appropriate section in Chapter 10, "Administration Tasks".

Login Page

The Company Name and Logo are configurable. See Chapter 9, "Personalizing the Portal(s)".

The language box displays only those languages that you enabled in the Locale Settings area during portal configuration. See "Set General Configuration Options" on page 45.

The User and Password must belong to a user who is set up in SyteLine according to the instructions in Chapter 7, "Setting Up and Managing SyteLine User Accounts for the Portal(s)".

If the user clicks on the **Forgot User or Password** link, a pop-up message tells them to contact your company for assistance. It provides a link to the Contact Us page.

My Company Profile Page

The fields on the My Company Profile page are mapped to fields on the SyteLine **Vendors** form.

My Profile Page

The portal user can edit information on this page, other than the user ID, and the changes take effect immediately. Fields are mapped as follows:

- The **User ID**, **Name**, and **E-mail Address** fields on this page are mapped to fields on the SyteLine **Users** form.
- The **Password** field (displayed with the Change Password link) is mapped to the **Password** field on the SyteLine **Users** form.
- If a portal user selects **Confirmations** on the My Profile page, the **Send External Notifications** field on the SyteLine **Users** form is selected for this user. The system will send event notifications to the specified e-mail address as well as to the portal Inbox page.
- If a portal user chooses to receive e-mails for any other option listed on the My Profile page, SyteLine adds that user to the SyteLine **Publication Subscribers** form with the appropriate publications.

On Time Delivery Page

The fields on the On Time Delivery page are mapped to fields on the SyteLine **Vendors** or **Multi-Site Vendors** forms.

When the page is first opened, the **Start Date** is set to three months prior to the current month/year and the **End Date** is set to the end of the current month/year. If these fields are left blank on the Vendor Portal, then data from the month/year of the first PO Line due date available in SyteLine, excluding history purchase orders, is shown for the logged-in vendor. History purchase orders are not considered for on-time delivery percentages.

If the number of order lines received in full by the due date in SyteLine does not match what the logged-in vendor expects to see on the portal, the discrepancy may be due to one of these events:

- The vendor shipment may not have made it to you by the PO line due date, even though it was shipped on time.
- You did not receive the material into the SyteLine system the day it was received at the dock.
- You received the material into the SyteLine system with a date prior to or later than the actual receipt date. This can occur by overwriting the Transaction Date on the **Purchase Order Receiving** form.
- Although the vendor shipped the line in full and you received it in full by the PO line due date, there may have been subsequent quantity returns to the line that were not re-shipped by the vendor (and re-received into SyteLine) before the PO line due date.

Planned Orders Page

The data fields on the Planned Orders page are mapped to fields on the SyteLine **Planning Detail** form.

If dock-to-stock days exist for an item on the **Planning Detail** form, then the planned due date displayed on the portal will be different from the due date on the **Planning Detail** form, because the due date on the portal is reduced by dock-to-stock days before it is displayed to portal users. The portal planned order firming process does not reduce the date any further.

The **Confirm** check box for firming planned orders is available for use by vendors if the **Allow to Firm PLNs** option is selected on the SyteLine **Vendor Contracts**, **Vendors**, or **Multi-Site Vendors** forms. For information about setting up this option in SyteLine, see “Setting Up Planned Orders” on page 89.

Product Price Contracts

This page displays summary data from the SyteLine **Vendor Contracts** form and detail data from the SyteLine **Vendor Contract Prices** form.

Purchase Orders Page

This page displays data from the SyteLine **Purchase Orders** and **Purchase Order Lines** forms. The picture displayed with each item is taken from the SyteLine **Items** form.

Uninstalling the Portal(s)

E

This section describes how to uninstall the portal(s) and remove the portal Web applications from SharePoint. You can install all portals at once or selected portals.

Uninstalling All Portal Programs

To uninstall all portals, Portal Manager, and Portal Diagnostics, use the Windows **Uninstall a program** tool and uninstall Infor Portal Foundation. This retracts and removes the portal solutions, removes the files that were copied to the server, and removes the Portal Manager shortcut link created on the desktop. List content, such as Help or Announcements, is not removed unless you remove the Web applications in SharePoint.

Removing Web Applications

Use SharePoint Central Administration to remove the portal Web application(s). When you delete a Web application:

- Select **Yes** to delete the content databases.
- Select **Yes** to delete the IIS Web sites.

This deletes all portal content, including announcements that were added after installation.

Manually delete the portal shortcuts from the desktop.

NOTE: If you uninstall the portals and then plan to re-install immediately, you may need to restart your SharePoint services first.

Clearing GAC DLL Files

If you are uninstalling all portals and want to completely clean your machine, as a best practice you should also clear out any remaining GAC .dll files for the portal version you are uninstalling. See “Cleaning Up After Portal Installation Failure” on page 180 for a list of files that may need to be removed. Also see “Can’t Log In Using Forms Authentication” on page 182 for information about removing entries from the STS web.config file.

Uninstalling Selected Portals

If you have installed one or more portals and you want to choose which ones to remove, follow these steps:

1. Double-click the `SL 9.00 Portal Install IPF 3.1 Build 70.exe` file.
2. On the **Welcome** screen, click **Next**.
3. Do one of the following:
   - If you have installed only one portal, and you want to remove just that solution:

     a. On the **Program Maintenance** screen, make sure **Add or Remove Features** is selected and then click **Next**.

     b. On the **Select Features** screen, clear **Portal Architecture** and then click **Next**.

     c. Complete the wizard steps.
   - If you have installed two or more portals, and you want to remove one or more of them:

     a. On the **Program Maintenance** screen, make sure **Add or Remove Features** is selected and then click **Next**.

     b. On the **Select Features** screen make sure **Portal Architecture** and **Portal Content** are selected and then click **Next**.

     c. On the **Web Applications** screen, make sure **Use existing Web Application** is selected and then click **Next**.

     d. On the **Select Web Applications** screen, in the box on the right select the Web applications to remove, move them to the box on the left, and then click **Next**.

     e. Complete the wizard steps.
4. Remove the Web applications for the uninstalled portal(s) as described in “Removing Web Applications” on page 211.

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