

The**Financial**Edge™

Installation Guide for the WebPortal

100713

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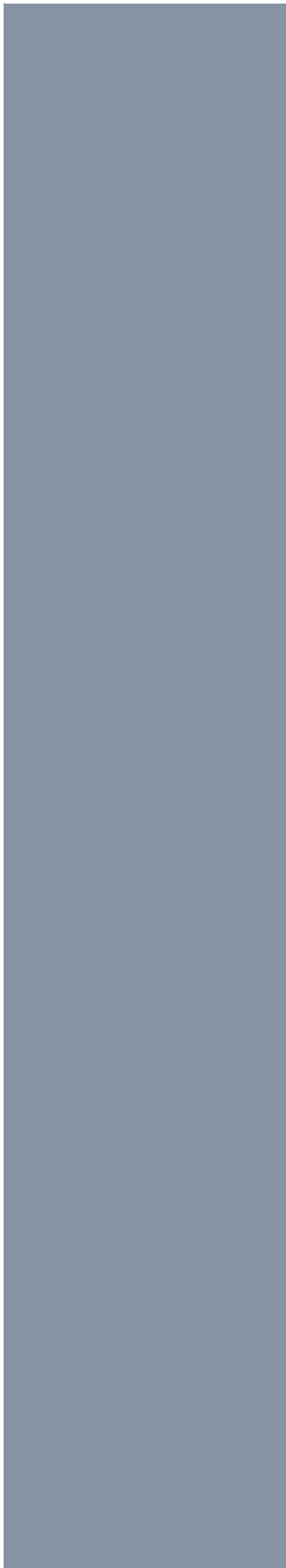
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Installation Guide for the WebPortal

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The Financial Edge WebPortal is a suite of web products that integrate with *The Financial Edge*. *WebPurchasing* and *WebInvoicing* are components within *The Financial Edge WebPortal*. With *WebPurchasing*, you can create and approve requisitions online. After you create requisitions, you can view and update requisition records and create purchase orders via *Accounts Payable*.

With *WebInvoicing*, you can submit reimbursement requests and get them approved online. When you submit reimbursement requests, you can select pre-defined expense categories and attach supporting documentation such as receipts. Once the request is approved, an invoice is created in *Accounts Payable*.

To view detailed system recommendations for The Financial Edge WebPortal, select **System Recommendations** from the **Support** menu on our website at www.blackbaud.com. This chapter details the installation process and security concerns of *The Financial Edge WebPortal*.



Note: To use *WebPurchasing*, you must have the optional module *Purchase Orders* and a web server. To obtain *Purchase Orders*, contact us at solutions@blackbaud.com or 1-800-443-9441. To use *WebInvoicing*, you must have *The Financial Edge WebPortal* licenses and a web server.

Installation and Security Considerations

Review these considerations before installing *The Financial Edge WebPortal*.

- ☐ You must have administrative privileges to run the installation.

- ☐ *The Financial Edge WebPortal* requires multiple unlock codes. *WebPurchasing* and *WebInvoicing* require their own unique unlock code, as well as unique unlock codes for their associated web licenses. Each module has five web licenses which can be used throughout the **WebPortal**. For example, if you purchase both *WebPurchasing* and *WebInvoicing*, you will have a total of 10 licenses to use in either product at any given time.
- ☐ Make sure your hardware meets the minimum processing speed and memory requirements. Visit Blackbaud's website at www.blackbaud.com for more information about system recommendations. To access our system recommendations, select **System Recommendations** from the **Support** menu on our website.
- ☐ We support *The Financial Edge WebPortal* on Windows Server 2016 and Windows Server 2019. Before you begin the installation process, make sure IIS is installed and running.



Note: Visit Microsoft's website at www.microsoft.com for more information about IIS.

- ☐ *The Financial Edge* client components must be installed on the web server before you can install the *The Financial Edge WebPortal* web service. Use the deployment package to install *The Financial Edge*. See the *Installation Guide* for the *Financial Edge* for more information. After you install *The Financial Edge* client components, you must reboot your web server and open *The Financial Edge* before installing *The Financial Edge WebPortal*.
- ☐ *WebPurchasing* requires *The Financial Edge* 7.77 and above. When you install *The Financial Edge* 7.77, you can no longer use older versions of *WebPurchasing* (formerly *eRequisitions*).
- ☐ Installing *WebPurchasing* will uninstall *eRequisitions*.
- ☐ For security reasons, we recommend you install both *The Financial Edge* and *The Financial Edge WebPortal* to directories on local drives formatted with the NTFS file system.
- ☐ Domain Controllers are not supported.
- ☐ If you have requisitions that have not been consolidated, consolidate them in *eRequisitions* before moving to *WebPurchasing*. Any requisitions that are not consolidated become unusable and purchase orders cannot be created. In this instance, your business office would have to delete the requisitions and start over.
- ☐ When setting up user security on the Login Properties screen in Microsoft SQL Server Management Studio, *WebPurchasing* appears in the **Database role membership** frame. Regardless if you use *WebPurchasing*, *WebInvoicing*, or both, mark **WebPurchasing** to set user security.
- ☐ Review your organization's LAN/WAN/Internet connectivity and determine where your *The Financial Edge WebPortal* server needs to reside. For example, if your organization does not require employees access to *WebPurchasing* or *WebInvoicing* from their homes or offsite, you can confine *WebPurchasing* or *WebInvoicing* to your LAN and not expose it to the Internet.
- ☐ If users will access *WebPurchasing* or *WebInvoicing* from home or offsite, you must plan and implement a secure firewall strategy. You should use knowledgeable technical staff or consulting services to determine your organization's security needs. We recommend the use of Secure Sockets Layer (SSL), a robust and secure Internet encryption and authentication method. SSL is a data security method available with IIS. Visit the Verisign website at www.verisign.com for more information about SSL.



Note: Blackbaud does not accept responsibility for unauthorized access of your web server or network.

- ☐ To set up an Internet connection, contact a local Internet Service Provider (ISP). Your ISP can also register your domain name.
- ☐ Establish a connection between the web server and The Financial Edge database server. For important information about setting up and maintaining your web environment, read “Network Security” on page 3.
- ☐ A network connection is required for each workstation accessing *The Financial Edge WebPortal*.
- ☐ *The Financial Edge WebPortal* requires a mouse and should be viewed on monitors with an 1024 x 768 or higher resolution.
- ☐ Either Microsoft’s *Internet Explorer (IE)* or Mozilla’s *Firefox* must be installed on each user’s workstation. We support *WebPurchasing* and *WebInvoicing* with *IE* 7 or higher on PCs and with *Firefox* 3 or higher on PCs and Macintosh operating systems. Other browsers are not supported and may not operate or display information correctly in *WebPurchasing* and *WebInvoicing*.
- ☐ For *Firefox* 3 users, if you experience issues immediately after updating or applying a patch for *WebPurchasing*, clear the workstation’s cache by selecting **Tools, Clear Private Data** from the menu bar.
- ☐ For dates to appear correctly in *The Financial Edge WebPortal*, Canadian clients must select “English (Canada)” in the **UI Culture** field on the Website Settings page of the Configuration Tool. This is in addition to Canadian regional settings you specify on your computer. For more information, see “Configure The Financial Edge WebPortal” on page 7.

Network Security

To determine your organization’s security needs, use knowledgeable technical staff or consulting services. We do not accept any responsibility for the unauthorized access of web servers or network.

There are numerous ways to configure *The Financial Edge WebPortal*. No matter which security configuration you select, we recommend enabling your IIS server to run Secure Sockets Layer (SSL). SSL provides a level of encryption to all incoming and outgoing HTTP requests and is often used by online banking or secure e-Commerce sites. SSL affords a level of safety to information traveling on the Internet.



Note: For more information about SSL installation and configuration, consult your IIS documentation and the Microsoft and VeriSign websites.

This section provides basic information to consider when making decisions regarding *WebPurchasing*. We recommend you discuss these options with your network administrator or firewall vendor.

Your users can access *WebPurchasing* and *WebInvoicing* via your intranet or the Internet.

- **Intranet** – You can run *WebPurchasing* and *WebInvoicing* on a web server accessible only to users logged into the internal network. This method secures your web server from Internet access because all users are authenticated as valid users of the internal network. It does not provide access to the program directly from your external website.
- **Internet** – The Financial Edge WebPortal can run on a web server visible on the Internet. This configuration allows users to access the website from an external Internet connection.

- **Firewalls** – If you plan to install The Financial Edge WebPortal on an Internet server, you need to consider how to protect your *Financial Edge* database from the Internet. Blackbaud recommends positioning the *The Financial Edge WebPortal* server in a Demilitarized Zone (DMZ) between two firewalls. This reduces the chance of unauthorized access.

Confer with knowledgeable staff and consultants to select a security option that safely grants the web server access to the database through the firewall. Your options depend on the make and model of your firewall. For more information, we recommend you consult with your firewall vendor or network administrator.

Examples of security options include:

- **Opening a “pinhole” in the firewall.** A pinhole is a designated port in the firewall that provides access to the database. With The Financial Edge WebPortal, you can limit database transactions to the assigned port.
- **Using packet filtering.** Some firewalls allow access to computers within a specified IP address range. A filter is added between the web server and the Internet to prohibit access to the web server unless a predefined address is used.
- **Using Secure Sockets Layer (SSL).** Secure Sockets Layer (SSL) is a data security method available as part of your IIS program. SSL encrypts all data passing between the web server and the client’s web browser. The data is secure while in transit across the Internet and is decrypted at the client workstation.

Install The Financial Edge WebPortal

After you have reviewed security considerations and configured your web server, you can install The Financial Edge WebPortal on the web server. We recommend the following installation configurations:

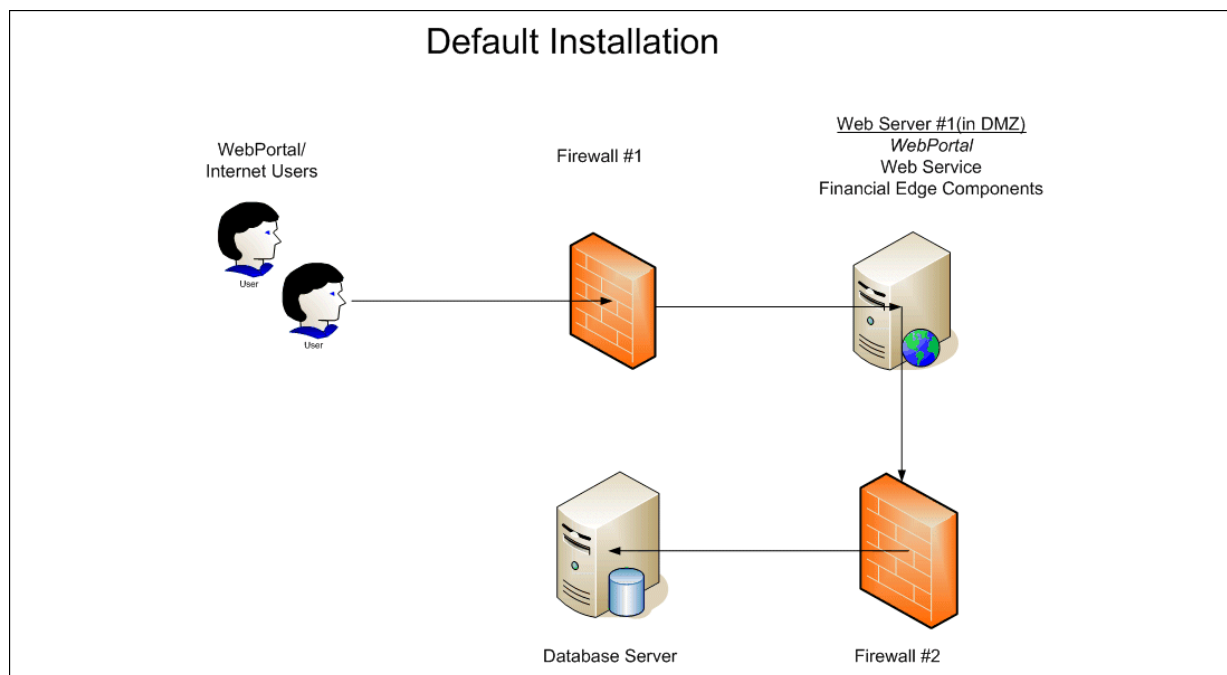
- **Default Installation** – If you choose the default installation, *The Financial Edge WebPortal*, its web service, and *The Financial Edge* are all installed on one web server. This installation configuration uses two firewalls with WebPurchasing installed between them in a DMZ. The front-end firewall separates the Internet and the web server. The back-end firewall separates the web server and the database server. For steps guiding you through this process, see “Install WebPurchasing using default installation” on page 5.
- **Installation on two web servers** – This installation configuration uses two web servers and two firewalls. One web server hosts *The Financial Edge WebPortal* in a DMZ. The second web server resides in your internal network and hosts the *The Financial Edge WebPortal* web service and *The Financial Edge* components. This configuration creates a buffer zone between the internal network and the World Wide Web. For steps guiding you through this process see, “Installation with Two Web Servers” on page 14.



Warning: Blackbaud does not assist with the setup and configuration of your firewalls and web servers. We recommend you consult with your system administrator.

Default Installation

With a default installation, *The Financial Edge WebPortal*, its web service, and ***The Financial Edge*** are all installed on one web server. There are two firewalls in this configuration. One firewall separates *The Financial Edge WebPortal* users and the web server. The second firewall separates the web server and the database server.



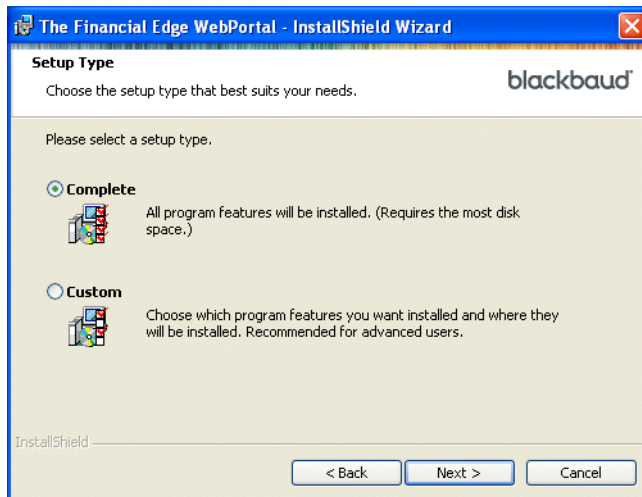
➤ Install WebPurchasing using default installation

1. Browse to the WebPortal directory and run the “Setup.exe” file. You can use the **Browse** button to locate this file.



Note: The WebPortal directory is located in The Financial Edge directory.

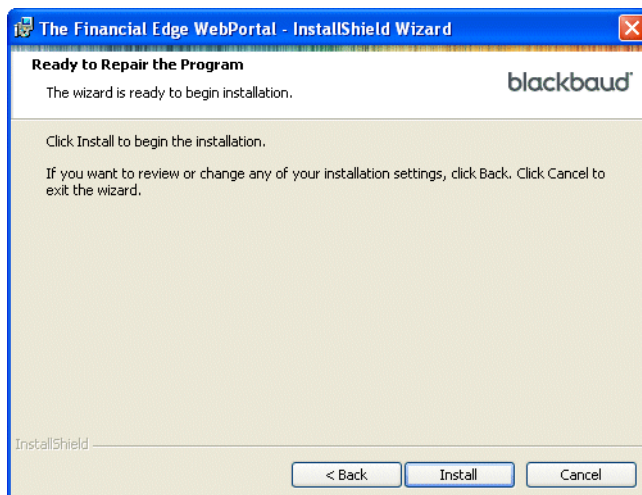
2. The InstallShield Wizard welcome screen appears.
3. Click **Next**. The License Agreement screen appears.
4. Read the license agreement, and if you accept the terms, select **I accept the terms in the license agreement**. If you select **I do not accept the terms in the license agreement**, you cannot continue with the installation.
5. Click **Next**. The Setup Type screen appears.



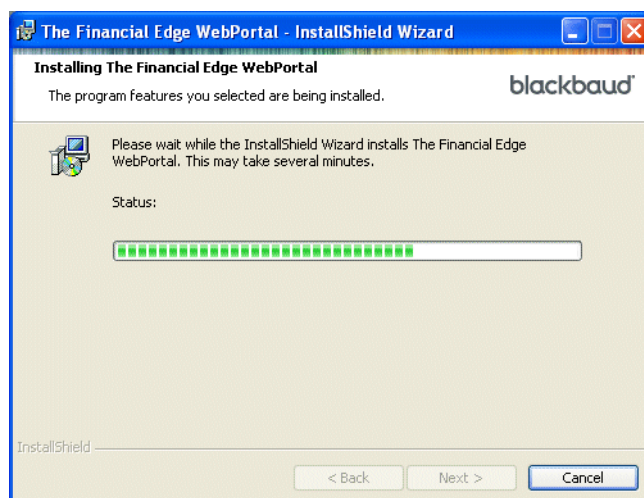
6. Select **Complete** to install all the program features of *The Financial Edge WebPortal*.
7. Click **Next**. The Destination Folder screen appears.
8. On this screen you can choose where you want to install *The Financial Edge WebPortal*. We recommend you accept the default destination folder.

If you want to change the default location, click **Change** to access the Change Current Destination Folder screen.

9. Browse to the folder where you want to install the program and click **OK** to return to the Destination Folder screen.
10. Click **Next**. The Ready to Install the Program screen appears.



11. Click **Install** to begin the installation process. The Installing The Financial Edge Web Portal screen appears, displaying the installation status.

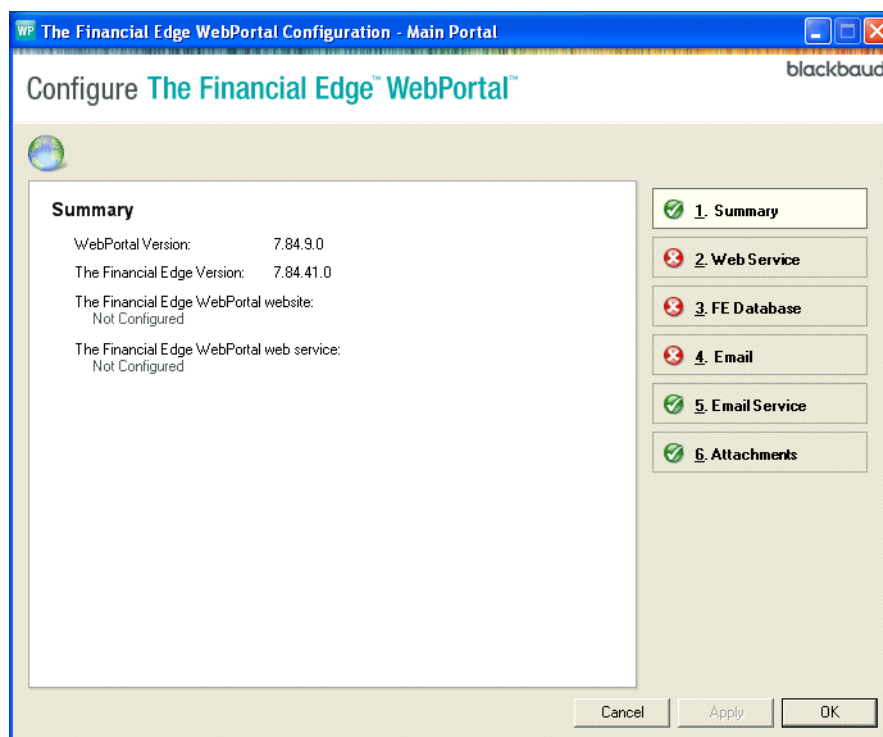


When the installation is complete, the InstallShield Wizard Completed screen appears.

12. Click **Finish**. *The Financial Edge WebPortal* is now installed. Once installed, you must configure *The Financial Edge WebPortal* for use.

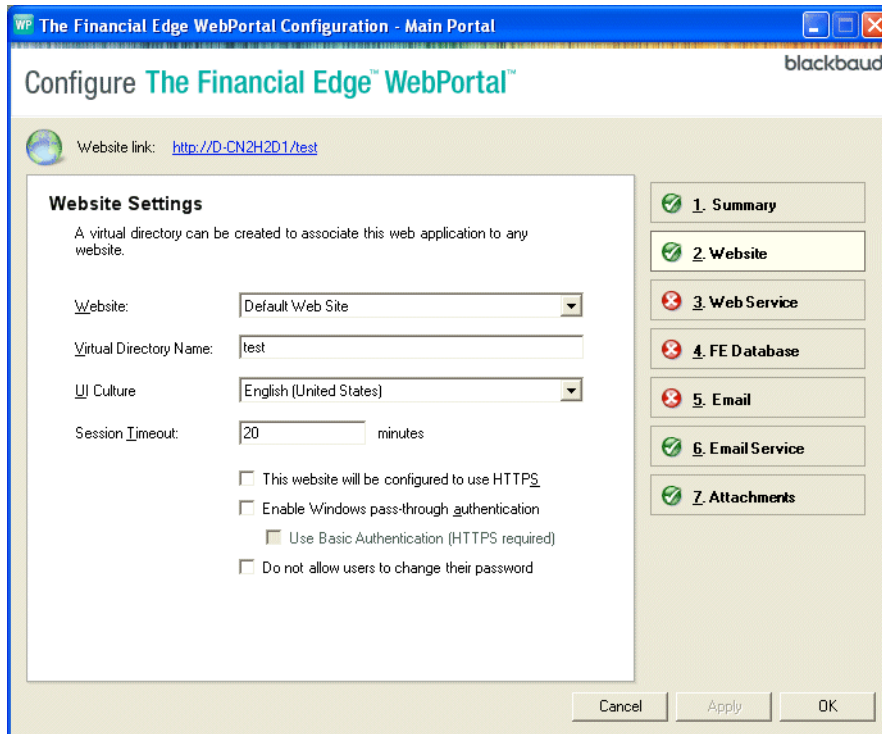
➤ Configure The Financial Edge WebPortal

1. On the *Windows* taskbar, select **Start, The Financial Edge, Web Portal, Configuration Tool**. The Configure The Financial Edge WebPortal screen appears.



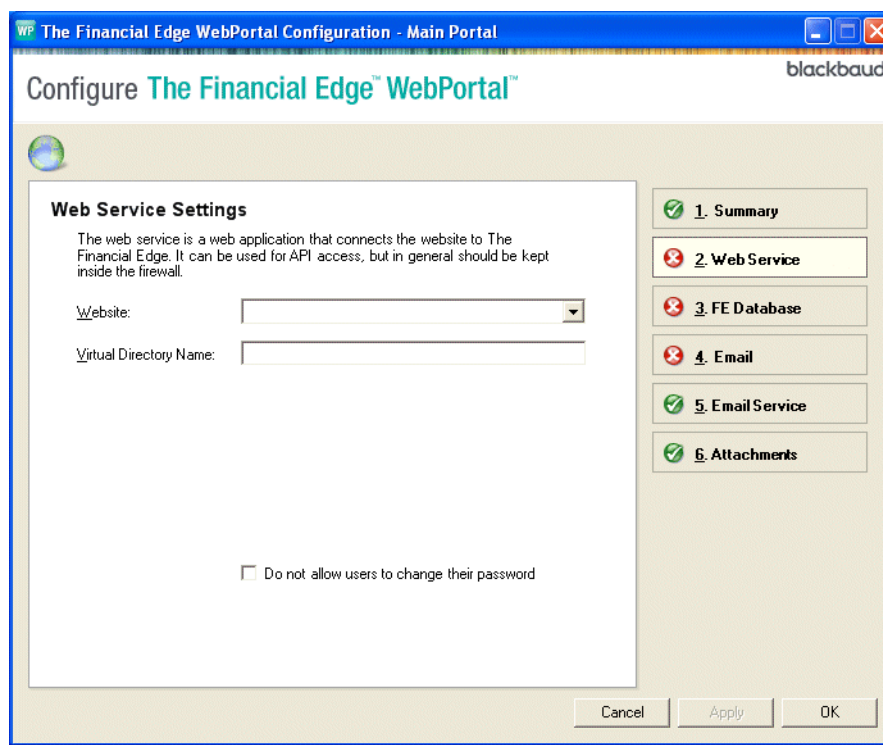
The Summary section displays the URL for the *The Financial Edge WebPortal* website and web service and the service address for the remote setup. This information does not appear until it is defined using the other settings of the configuration tool.

2. To define the URL for your *The Financial Edge WebPortal* website, click **Website**. The Website Settings screen appears. On this screen you designate the website and virtual directory for the *The Financial Edge WebPortal* website.



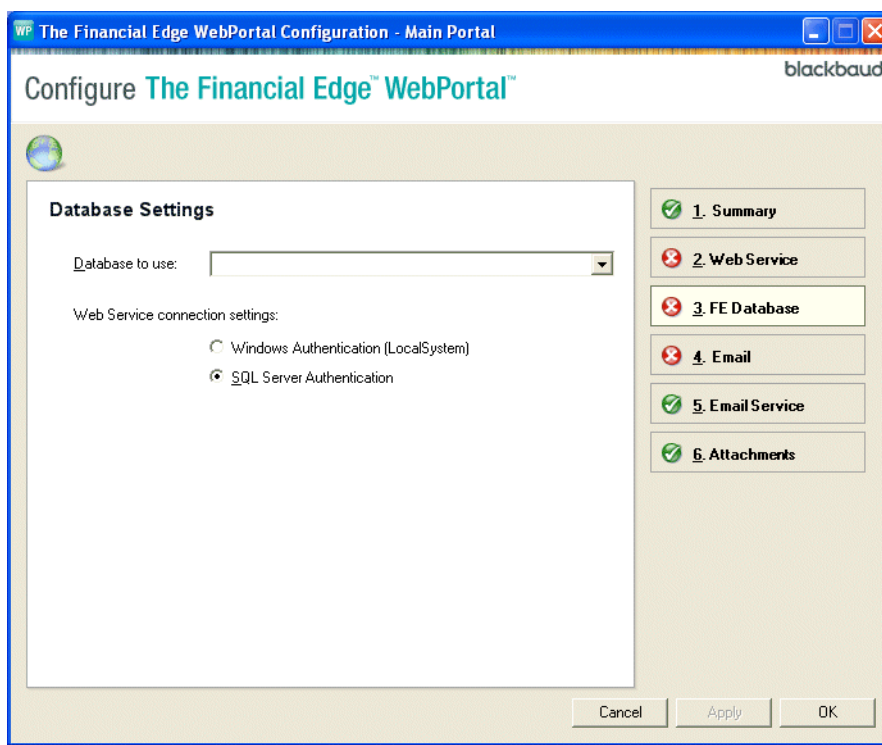
3. In the **Website** field, select the IIS website you want to use. The only websites available in this field are the default and any others previously created in IIS.
4. In the **Virtual Directory Name** field, enter a virtual directory name for the *The Financial Edge WebPortal* website.
5. In the **UI Culture** field, select a default regional setup for your website.
6. In the **Session Timeout** field, enter the number of minutes the *WebPortal* can remain idle before the user is logged out.
7. If your web server is configured to use HTTPS, mark **This website will be configured to use HTTPS**.
8. If you want to use the Windows Authentication method to log into *The Financial Edge WebPortal*, mark **Enable Windows pass-through authentication**.

9. To define the web service that connects your website to *The Financial Edge*, click **Web Service**. The Web Service Settings screen appears.



10. In the **Website** field, select the IIS website you want to use. The only websites available in this field are the default and any others previously created in IIS. The web service and the web application do not need to run on the same website.
11. In the **Virtual Directory Name** field, enter a virtual directory name for the The Financial Edge WebPortal web service.

12. To select *The Financial Edge* database that *The Financial Edge WebPortal* will use, click **FE Database**. The Database Settings screen appears.



13. In the **Database to use** field, select the *Financial Edge* database you want to use with *The Financial Edge WebPortal*.
14. Once you select the database, mark the authentication method to use. This setting defines how the *The Financial Edge WebPortal* web service connects to *The Financial Edge* database.
15. To configure email settings, click **Email**. The Email Settings screen appears. The email service sends email messages when *The Financial Edge WebPortal* users choose to be notified of specific events, for example when a requisition is approved or rejected.



Note: The email settings are configured on the server hosting the *The Financial Edge WebPortal* web service.

- a. If you do not want users to receive notifications, mark **Do not send Email notifications** and continue to step 16.
- b. If you want to receive notifications, mark **Send Email notifications**.
- c. In the **SMTP Host** field, enter the address of your email server.
- d. In the **SMTP Port** field, enter the SMTP port that transfers the email messages. Mark **Use TLS when connecting** if your SMTP server requires TLS encryption.
- e. In the **User Name** and **Password** fields, enter the username and password of an account with permission to send email messages.
- f. In the **Send Email From** field, enter the email address sending the notifications, for example, webpurchasing@blackbaud.com.
- g. In the **Send Emails every [] minutes** field, enter how often the email service should send notifications.
- h. If you want notifications sent in HTML format, mark **Include HTML in Emails**. If this checkbox is unmarked, notifications are sent in plain text.
- i. In the **URL** field, define how URLs are formatted within messages sent by the *The Financial Edge WebPortal* email service, for example, http://servername/webpurchasing or http://www.blackbaud.com/webpurchasing. The URL should be accessible to all users.
- j. To test the configuration, click **Test Email**. Enter an email address where the test message is sent in the **Send test Email To** field. Click **Send Email**.

16. To select the account that runs the email service, click **Email Service**. The Service Settings screen appears.

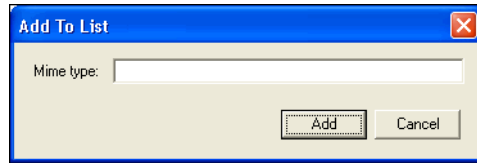
17. Select a Windows account that has WebPurchasing role access:
- **Network Service Account** and **Local System Account** – Mark one of these options to use a predefined local account.
 - **Specific Account** – Mark this option if *The Financial Edge* SQL Server instance is set to Windows Only Authentication mode. Select a Windows Account that has *The Financial Edge WebPortal* role access to *The Financial Edge* database. Enter this Windows username and password in the **User Name**, **Password**, and **Confirm Password** fields. For more information about the Windows Authentication Method, see “Set Up The Financial Edge WebPortal to Use Windows Authentication” on page 23.



Note: The selected Windows account also needs **Log on as a service** permissions on the web server.

18. To define the file types that can be attached to an invoice or requisition request, click **Attachments**. The Attachments screen appears.
19. In the **Maximum attachment size** field, enter the maximum file size in kilobytes allowed to be attached to an invoice or requisition request. For example, enter “1024” to attach files up to 1024 kb to an invoice or requisition request.

20. To define allowable file types for invoice or requisition request attachments, click **Add**. The **Add to List** screen appears.



21. In the **Mime type** field, enter the file type, for example “image/tiff”, and click **Add**. The file type is added to the list.
22. To save your configuration settings, click **Apply**.
23. To close the configuration screen, click **OK**. A message appears and notifies you that *The Financial Edge WebPortal* is configured. Click **OK** to close the configuration utility. Your website has been configured.

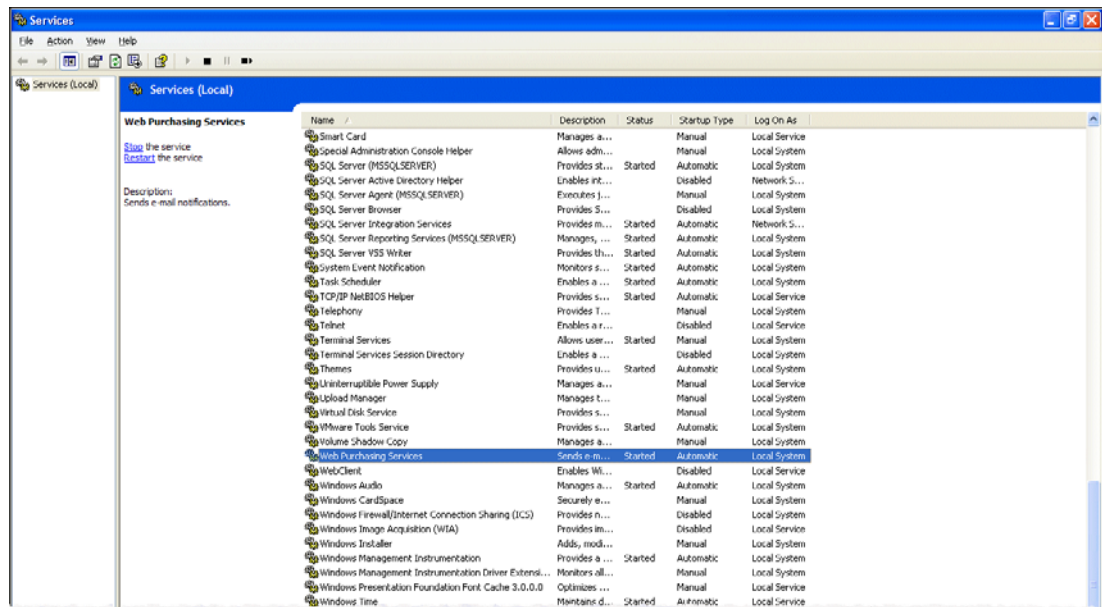


Note: Your *The Financial Edge WebPortal* URL appears as a hyperlink at the top of the configuration screen.

➤ Restart the WebPurchasing Services

Once you have configured The Financial Edge WebPortal email service on the Configure The Financial Edge WebPortal screen, you must restart Web Portal Services that sends the email notifications.

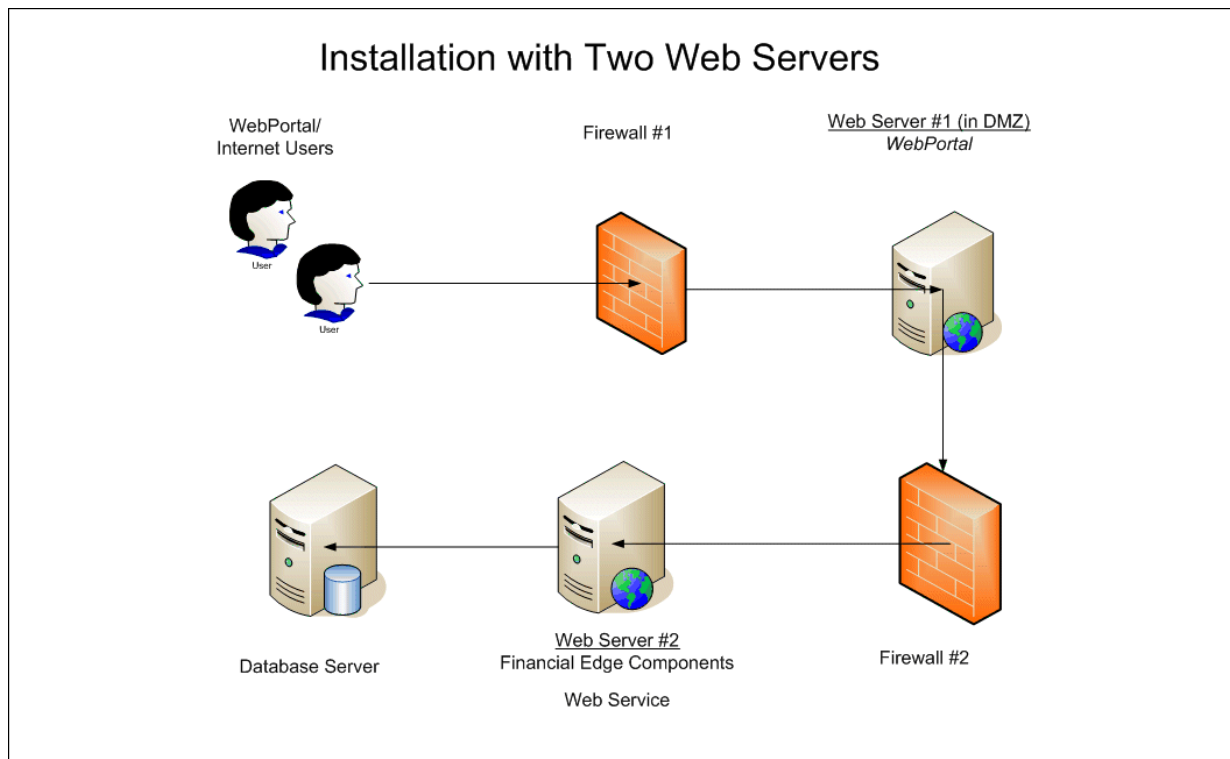
1. On the Windows taskbar, select **Start, Programs, Administrative Tools, Services**. The Services screen appears.



2. Scroll down to Web Portal Services. Right-click the service and select **Restart** from the shortcut menu.
3. To close the Services screen, select **File, Exit** from the menu bar.

Installation with Two Web Servers

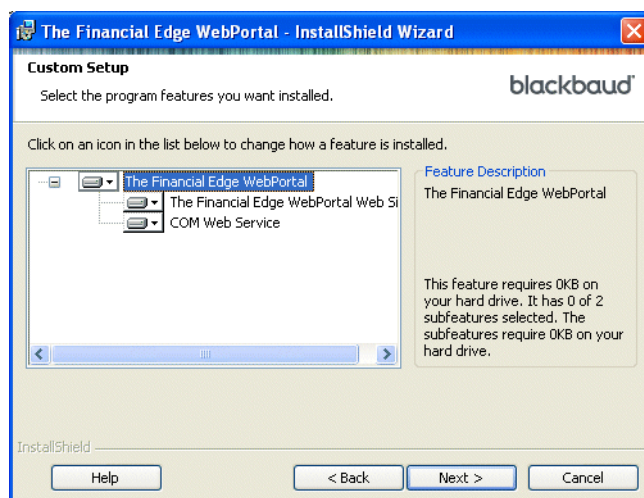
For this installation scenario, the The Financial Edge WebPortal website is installed on a web server and a web service and *The Financial Edge* are installed on a second server. Two firewalls are also used. One firewall separates the *WebPortal* website from the Internet and the second firewall separates the WebPortal website from the web service and the internal network.



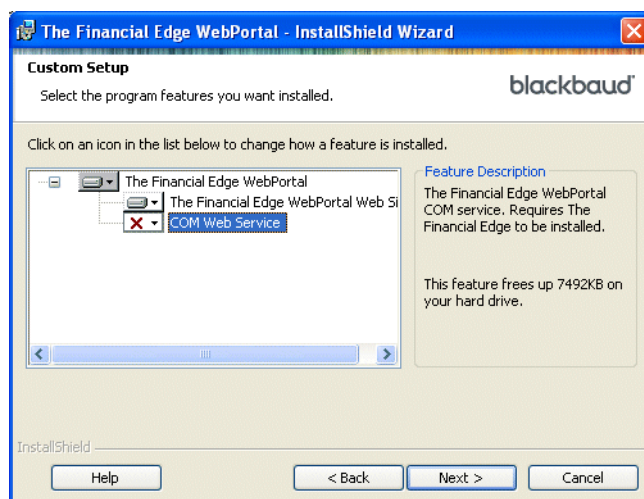
➤ Install The Financial Edge WebPortal on the first web server

1. Browse to the WebPortal directory and run the “Setup.exe” file. You can use the **Browse** button to locate this file.
2. The InstallShield Wizard welcome screen appears.
3. Click **Next**. The License Agreement screen appears.
4. Read the license agreement, and if you accept the terms, select **I accept the terms in the license agreement**. If you select **I do not accept the terms in the license agreement**, you cannot continue with the installation.
5. Click **Next**. The Setup Type screen appears.

6. Select **Custom** to choose which components of *The Financial Edge WebPortal* you want installed on the first server and where they will be installed. The Custom Setup screen appears.



7. *The Financial Edge WebPortal* is the only program to be installed on this web server. You need to remove the web service from this instance of the installation. Click the down arrow next to **COM Web Service** and select **This feature will not be available**. A red X appears next to this feature. If *The Financial Edge* workstation components are not installed on this server, the **COM Web Service** will be marked unavailable.

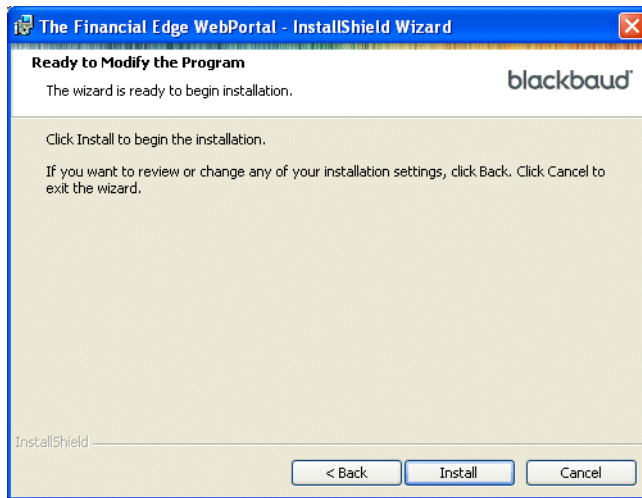


8. You also can choose where you want to install *The Financial Edge WebPortal*. We recommend you accept the default destination folder.

If you want to change the default location, click **Change** to access the Change Current Destination Folder screen.

9. Browse to the folder where you want to install the program and click **OK** to return to the Custom Setup screen.

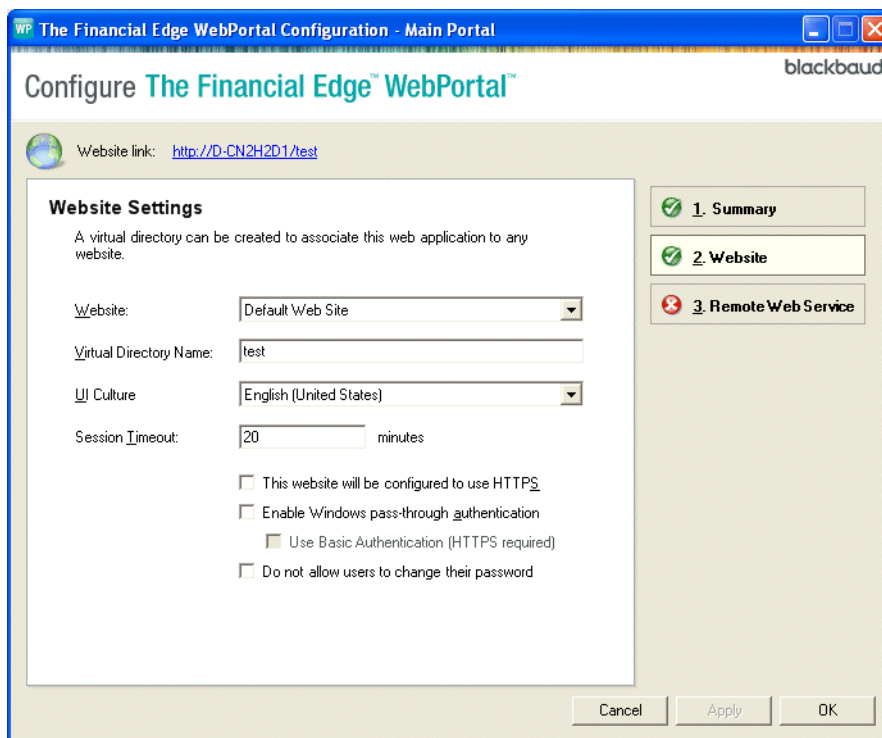
10. Click **Next**. The Ready to Install the Program screen appears.



11. Click **Install** to begin the installation process. The Installing The Financial Edge Web Portal screen appears, displaying the installation status.

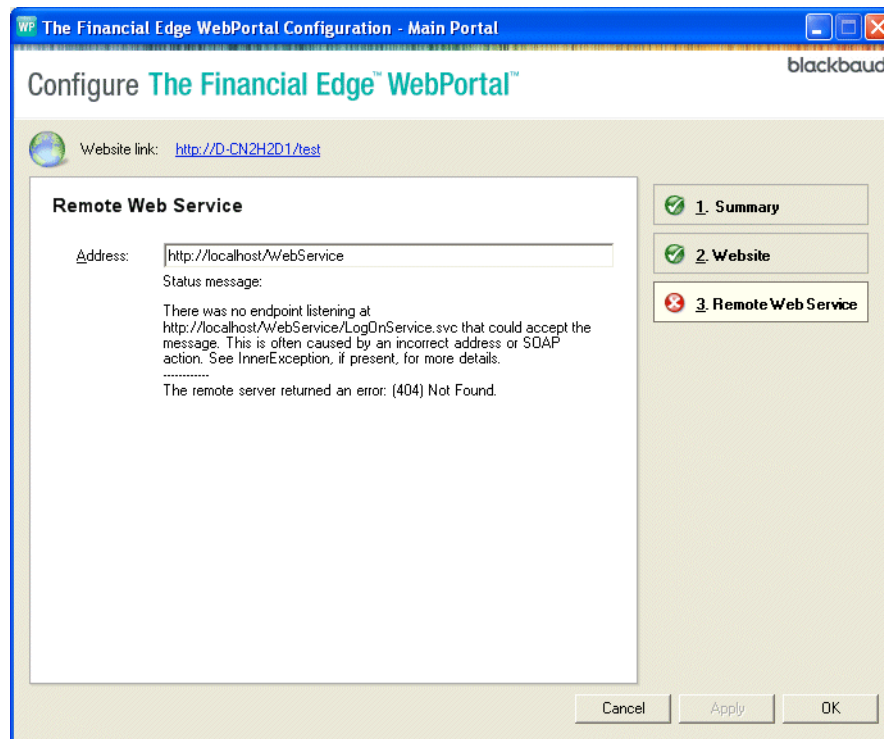
When the installation is complete, the InstallShield Wizard Completed screen appears.

12. Click **Finish**. *The Financial Edge WebPortal* is now installed on the web server and the configuration screen appears.
13. To define the URL for your *The Financial Edge WebPortal* website, click **Web**. The Website Setting screen appears. On this screen you designate the website and virtual directory for the *The Financial Edge WebPortal* website.



14. In the **Website** field, select the IIS website you want to use. The only websites available in this field are the default and any others previously created in IIS.

15. In the **Virtual Directory Name** field, enter a virtual directory name for the *The Financial Edge WebPortal* website.
16. In the **UI Culture** field, select a default regional setup for your website.
17. In the **Session Timeout** field, enter the number of minutes the *WebPortal* can remain idle before the user is logged out.
18. If your web server is configured to use HTTPS, mark **This website will be configured to use HTTPS**.
19. If you want to use the Windows Authentication method to log into *The Financial Edge WebPortal*, mark **Enable Windows pass-through authentication**.
20. To define the remote web service that connects your website to the web server that hosts *The Financial Edge*, click **Remote Web Service**. The Remote Web Service screen appears.



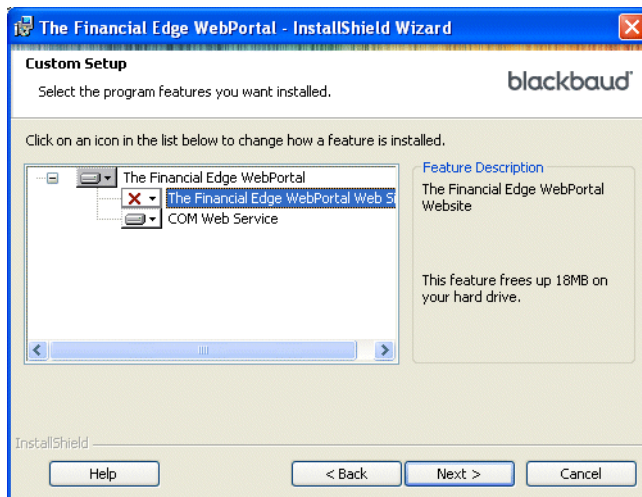
21. In the **Address** field, enter the URL of the remote web service. This information is defined on the Configuration Tool for the web service server. See step 20 of “Install web service and The Financial Edge on second web server” on page 17.
22. To save your configuration settings, click **Apply**.
23. To close the configuration screen, click **OK**. A message appears and notifies you that *The Financial Edge WebPortal* is configured. Click **OK** to return to the configuration page. The *The Financial Edge WebPortal* installation on your first web server is complete.

➤ Install web service and The Financial Edge on second web server

Before installing the web service, be sure *The Financial Edge* is installed on the second web server. See *The Installation Guide for The Financial Edge* for more information.

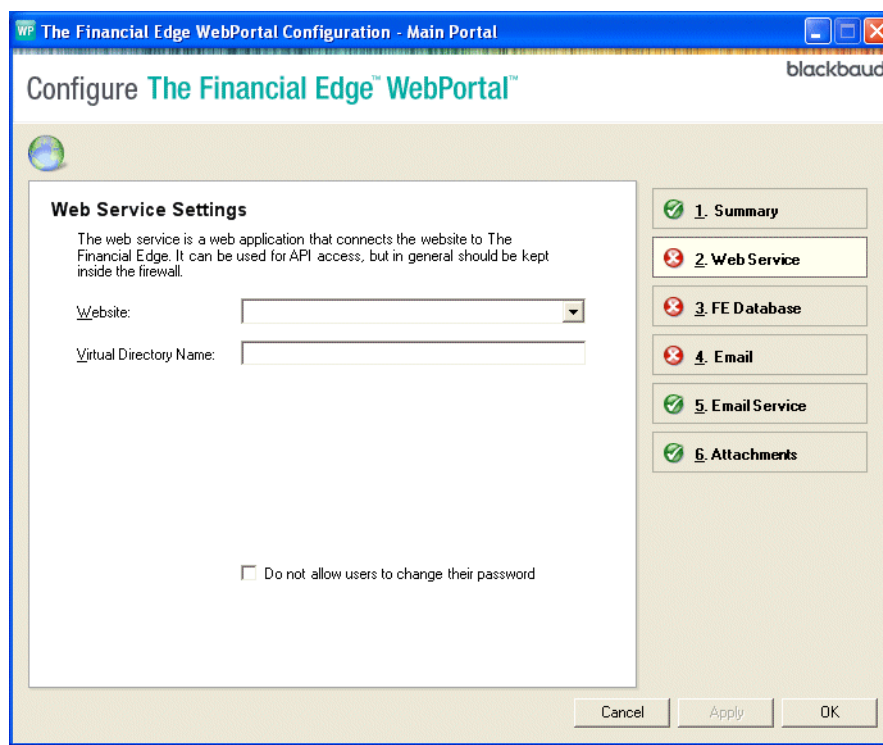
1. On the Windows taskbar, select **Start, Run**. The Run screen appears.

2. In the **Open** field, enter the path to the “Setup.exe” file located in the WebPortal folder. You can use the **Browse** button to locate this file.
3. Click **OK**. The InstallShield Wizard welcome screen appears.
4. Click **Next** to the License Agreement screen. Accept the terms of the license agreement.
5. Click **Next** to the Setup Type screen. Select **Custom** to choose the web service components you want installed on the web server.
6. On the Custom Setup screen, click the arrow next to **The Financial Edge Web Portal Website** feature and select **This feature will not be available**. This prevents *The Financial Edge WebPortal* from being installed on the web server. The web service should be the only feature installed.



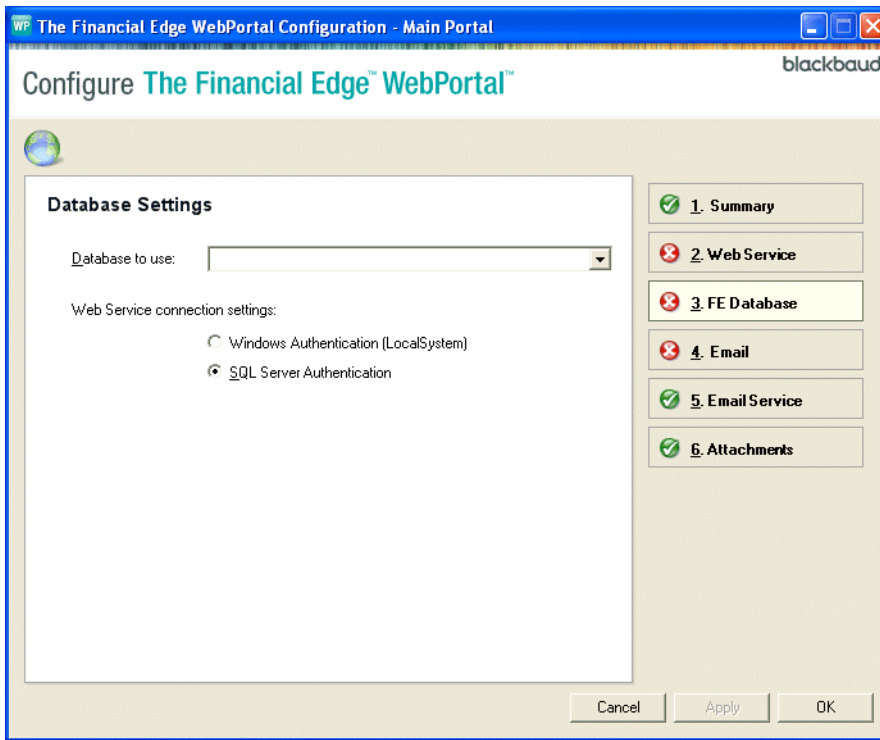
7. You also can choose where you want to install the *The Financial Edge WebPortal* web service. We recommend you accept the default destination folder.
If you want to change the default location, click **Change** to access the Change Current Destination Folder screen.
8. Browse to the folder where you want to install the web service and click **OK** to return to the Custom Setup screen.
9. Click **Next**. The Ready to Install the Program screen appears.
10. Click **Install** to begin the installation process. The Installing The Financial Edge Web Portal screen appears, displaying the installation status. When the installation is complete, the InstallShield Wizard Completed screen appears.
11. Click **Finish**. The web service is now installed on the web server and the configuration screen appears.

12. To define the web service that connects your website to *The Financial Edge*, click **Web Service**. The Web Service Settings screen appears.



13. In the **Website** field, select the IIS website you want to use. The only websites available in this field are the default and any others previously created in IIS. Typically, you select the default IIS website.
14. In the **Virtual Directory Name** field, enter a virtual directory name for the *The Financial Edge WebPortal* web service.

15. To select *The Financial Edge* database that *The Financial Edge WebPortal* will connect to, click **FE Database**. The Database Settings screen appears.



16. In the **Database to use** field, select *The Financial Edge* database to connect to *The Financial Edge WebPortal*.
17. Once you select the database, mark the authentication method to use when the *The Financial Edge WebPortal* web service connects to *The Financial Edge* database. If you select the Windows Authentication method, see “Set Up The Financial Edge WebPortal to Use Windows Authentication” on page 23.
18. To configure email service settings, click **Email**. The Email Settings screen appears. The email service sends email messages when *The Financial Edge WebPortal* users choose to be notified of specific events, for example, when a requisition is approved or rejected.



Note: The email settings are configured on the server hosting the *The Financial Edge WebPortal* web service.

- a. If you do not want to receive notifications, mark **Do not send Email notifications** and continue to step 19.
- b. If you want to receive notifications, mark **Send Email notifications**.
- c. In the **Host** field, enter the address of your email server.
- d. In the **Port** field, enter the SMTP port that transfers the email messages.
- e. In the **User Name** and **Password** fields, enter the username and password of an account with permission to send email messages.
- f. In the **Send Email From** field, enter the email address sending the notifications, for example, webpurchasing@blackbaud.com.
- g. In the **Send Emails every [] minutes** field, enter how often the email service should send notifications.
- h. If you want notifications sent in HTML format, mark **Include HTML in Emails**. If this checkbox is unmarked, notifications are sent in plain text.
- i. In the **URL** field, define how URLs are formatted within messages sent by the *The Financial Edge WebPortal* email service, for example, http://servername/webpurchasing or http://www.blackbaud.com/webpurchasing. The URL should be accessible to all users.
- j. To test the configuration, click **Test Email**. Enter an email address where the test message is sent in the **Send test Email To** field. Click **Send Email**.

19. To select the account that runs the email service, click **Email Service**. The Service Settings screen appears.

20. Select a Windows account that has WebPurchasing role access:
- **Network Service Account** and **Local System Account** – Mark one of these options to use a predefined local account.
 - **Specific Account** – Mark this option if *The Financial Edge* SQL Server instance is set to Windows Only Authentication mode. Select a Windows Account that has *The Financial Edge WebPortal* role access to *The Financial Edge* database. Enter this Windows username and password in the **User Name**, **Password**, and **Confirm Password** fields. For more information about the Windows Authentication Method, see “Set Up The Financial Edge WebPortal to Use Windows Authentication” on page 23.

Note: This Windows account also needs **Log on as a service** permissions on the web server.



21. To define the file types that can be attached to an invoice or requisition request, click **Attachments**. The Attachments screen appears.
22. To define a file type acceptable to attach to an invoice or requisition request, click **Add**. The **Add to List** screen appears.

23. In the **Mime type** field, enter the file type, for example “image/tiff”, and click **Add**. The file type is added to the list.

24. To save your configuration settings, click **Apply**. On the Summary screen, the web service address appears in the **Service address for remote setup** field. This is the web service address you entered on the Remote Web Service screen of the configuration tool in step 20 of “Install The Financial Edge WebPortal on the first web server”. This address connects the web service to the website.

Summary

WebPortal Version: 7.78.224.0

The Financial Edge Version: 7.78.654.0

The Financial Edge WebPortal website:
Not Configured

The Financial Edge WebPortal web service:
<http://AES2009/webservice/LogOnService.svc>

Service address for remote setup:

25. To close the configuration screen, click **OK**. The installation for your *The Financial Edge WebPortal* web service is complete.

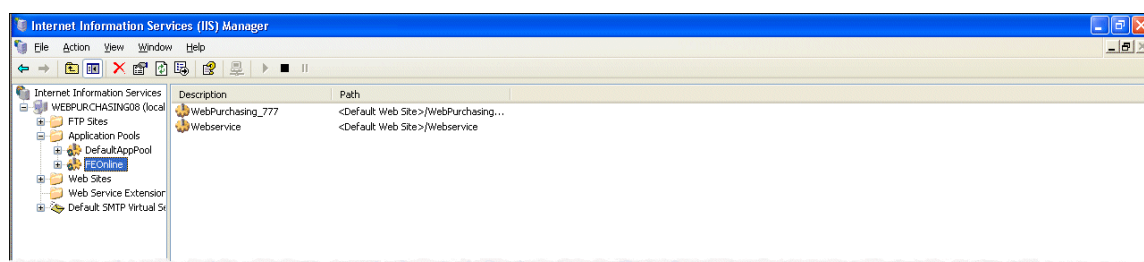
Set Up The Financial Edge WebPortal to Use Windows Authentication

If *The Financial Edge* SQL server instance is set to Windows only authentication mode, you must configure *The Financial Edge WebPortal* to use Windows authentication.

➤ Configure WebPortal to use windows authentication

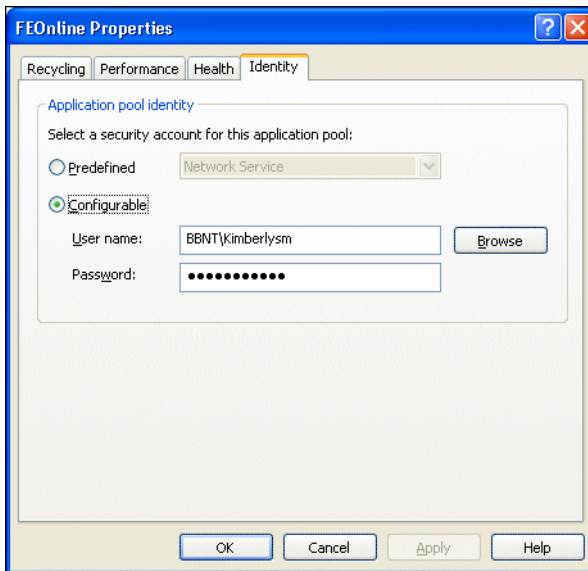
Before you configure *The Financial Edge WebPortal* to use the Windows Authentication method, you must add the Windows account you want to use to your SQL server instance and then to the *The Financial Edge WebPortal* database role of *The Financial Edge* database.

1. From the Internet Information Services (IIS) Manager, expand the **Application Pools** folder in the tree view.



2. Right-click **FEOnline** and select **Properties** from the shortcut menu. The FEOnline Properties screen appears.

3. Select the **Identity** tab.



4. Mark **Configurable** and enter a Windows **User name** and **Password** that can be authenticated on the domain and has access to *The Financial Edge* database.
5. To save your changes, click **Apply**.
6. To close the FEOnline Properties screen, click **OK**.
7. Open The Financial Edge Web Portal Configuration screen and click **FE Database**. The Database Settings screen appears.

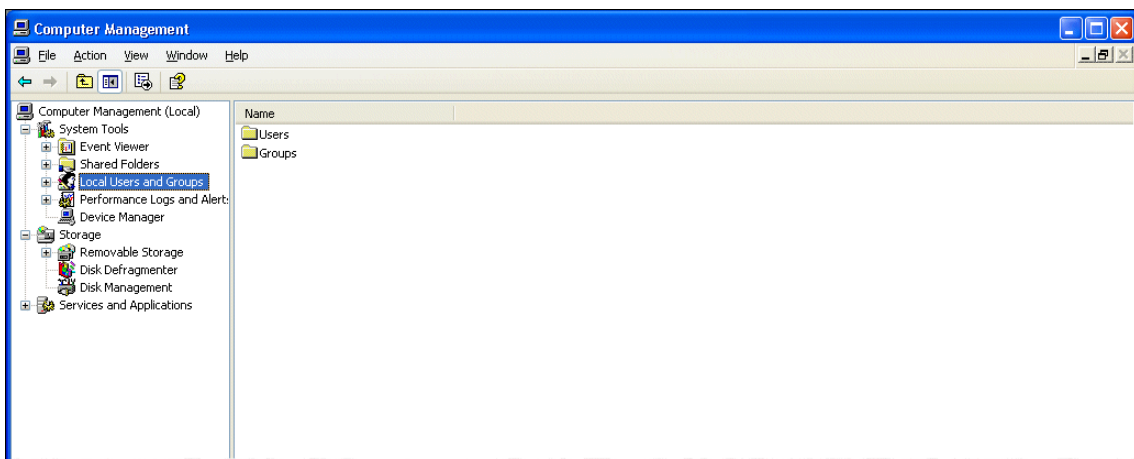
The **Windows Authentication** option lists the username you entered in step 4 in parentheses. Mark this setting and click **Apply**.

8. To save your changes click **OK**. A message appears to notify you that the changes were saved.

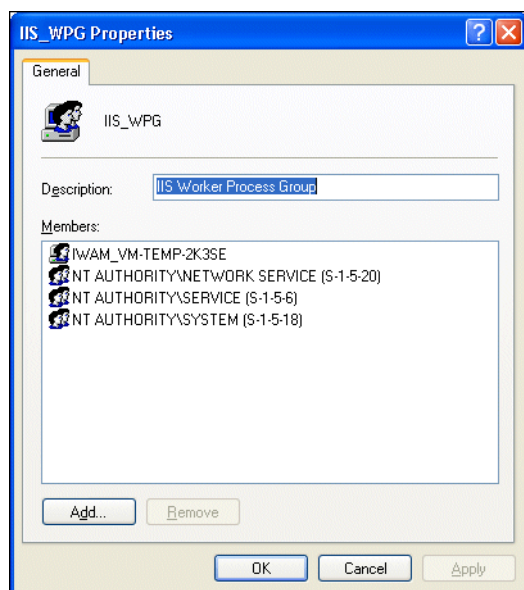
➤ **Add user account to local group account of the web server (for Windows 2003 Server)**

Follow these steps if you installed *The Financial Edge WebPortal* on Windows 2003 Server.

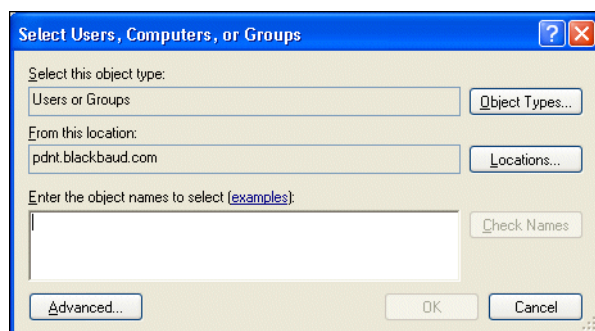
1. From the Start menu, select **Programs, Administrative Tools, Computer Management**. The Computer Management screen appears.



2. In the tree view on the left, expand the **Local Users and Groups** folder.
3. In the **Local Users and Groups** folder, double-click the **Groups** folder.
4. In the details pane, right-click **IIS_WPG** and select **Add to Group** from the shortcut menu. The IIS_WPG Properties screen appears.



5. To add a user account to the IIS_WPG group, click **Add**. The Select Users, Computers, or Groups screen appears.



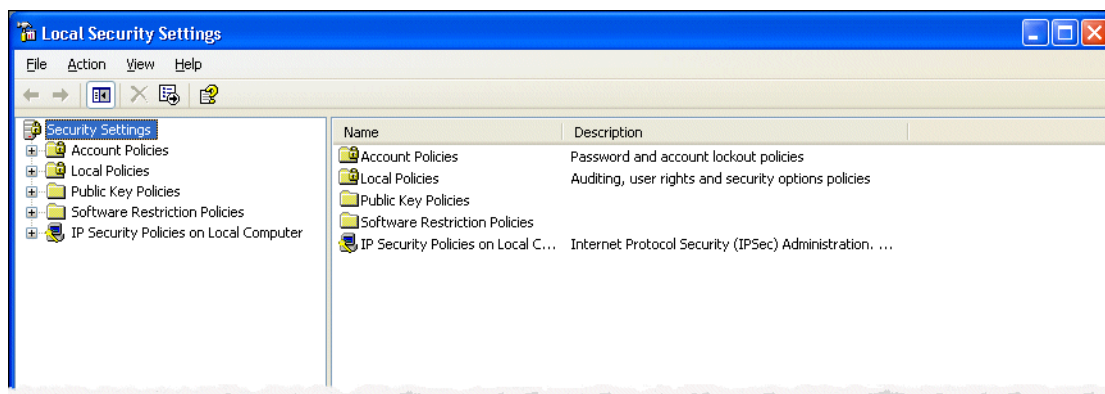
6. In the **Enter the object names to select** field, enter the user account and click **OK**.

Setup The Financial Edge WebPortal to Use Specific Accounts

Once you have configured *The Financial Edge WebPortal* to use a specific account on the Service Settings screen of the Configuration Tool, you must grant batch job rights and web service processing rights to the Windows account.

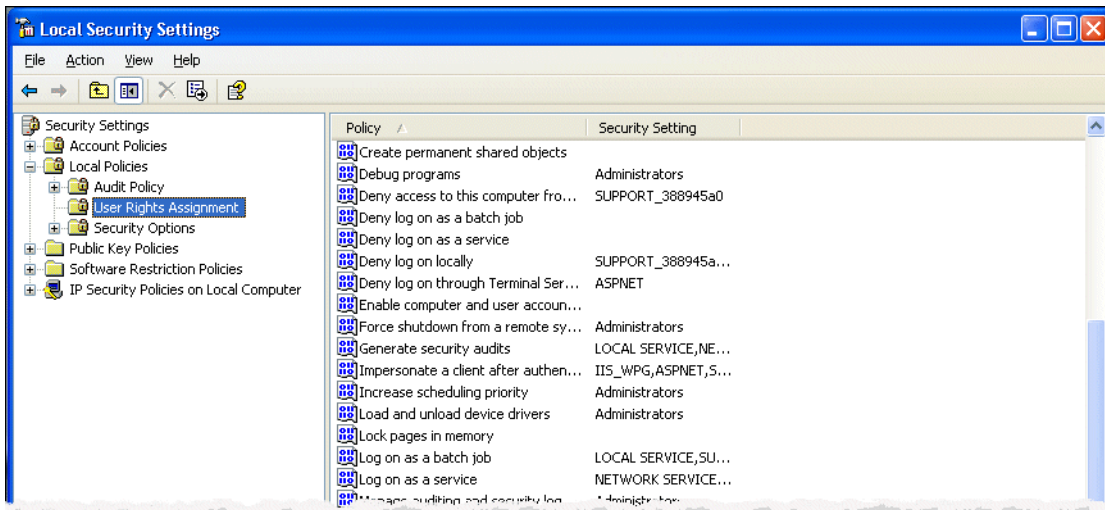
➤ **Configure batch rights and service processing rights for specific user accounts**

1. From the Start menu, select **Programs, Administrative Tools, Local Security Policy**. The Local Security Settings screen appears.

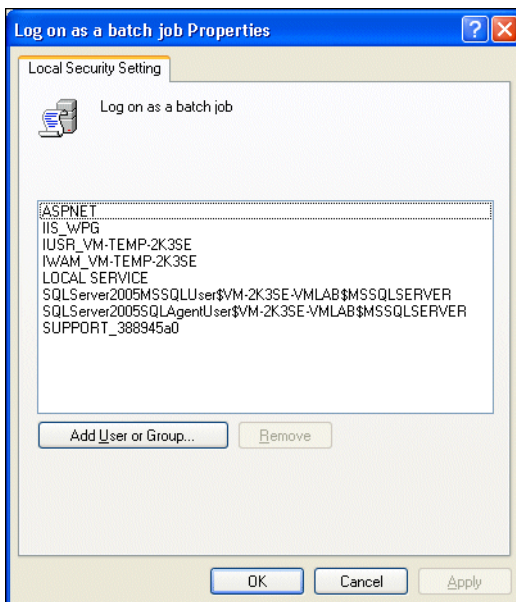


2. In the tree view on the left, expand the **Security Settings** folder.

3. In the **Security Settings** folder, expand the **Local Policies** folder and select **User Rights Assignments**.

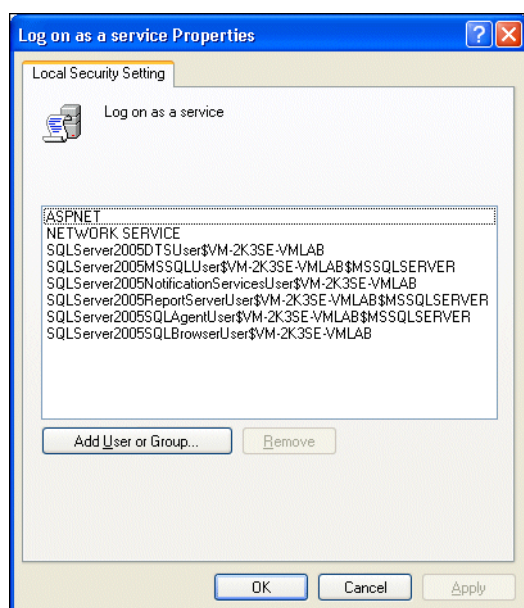


4. In the details pane, right-click **Log on as a batch job** and select **Properties** from the shortcut menu. The Log on as a batch job Properties screen appears.



5. Click **Add User or Group** to grant the user account permission to log on by means of a batch-queue facility.
6. Click **OK** to return to the Log on as a batch job Properties screen.
7. Click **OK** to return to the Local Security Policy screen.

8. In the details pane, right-click **Log on as a service** and select **Properties** from the shortcut menu. The Log on as a service Properties screen appears.



9. Click **Add User or Group** and to grant the user account permission to register a process as a service.
10. Click **OK** to return to the Log on as a service Properties screen.
11. Click **OK** to return to the Local Security Policy screen.

Access The Financial Edge WebPortal

During the install process, you define the URL for *The Financial Edge WebPortal* website, on the Configuration screen. Your security settings defined in *Accounts Payable* determine whether you have access to *WebPurchasing*, *WebInvoicing*, or both. If you have Supervisor rights, you can access both applications. For more information on defining your security settings, see the setup chapters of either the *WebPurchasing User Guide* or the *WebInvoicing User Guide*.

➤ Access The Financial Edge WebPortal site

1. To access *The Financial Edge WebPortal* from a workstation using your browser, enter “http://<web server>/<virtual directory name>” in the URL address box, where <web server> is the computer name of your web server and <virtual directory name> is the name you selected for The Financial Edge WebPortal website.
2. On the login page, enter your existing user name and password. The Supervisor user name and password is the same for *The Financial Edge* and The Financial Edge WebPortal. Each time you access the login page, you must enter your user name and password.



Warning: For security purposes, we strongly recommend you periodically change the Supervisor user name and password.

3. To enter The Financial Edge WebPortal, click **Log In**. Your security settings defined in **Accounts Payable** determine whether you have access to *WebPurchasing*, *WebInvoicing*, or both. If you have Supervisor rights, you can access both applications.



Note: To log out of The Financial Edge WebPortal, always click **Log Out**. Do not close the browser because the program considers the license you are using active until the session expires. If you have multiple users accessing The Financial Edge WebPortal, this may prevent someone from logging on.

Note: An option to enable Multi-factor Authentication (MFA) was implemented in Patch 42. If the Supervisor has enabled MFA, users will be required to enter an email address to receive a code via email to complete the login process.