

finPOWER Connect 3 Portal Host Installation and Configuration

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Disclaimer

This document contains information that may be subject to change at any stage.

All code examples are provided "as is".

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Introduction

This document describes the steps to be taken to install and configure the finPOWER Connect Portal Host.

finPOWER Connect Portal Host is a Web application that runs under Microsoft's Internet Information Services (IIS) Web Server software.

Installation and configuration should only be undertaken by a network administrator who should be familiar with both IIS configuration and network security.

NOTE: Use **the finPOWER Connect Cloud 3 Installation and Configuration** or **finPOWER Connect Web Services Installation and Configuration** documents in conjunction with this document if you are unsure how to configure IIS.

System Requirements

See the finPOWER Connect 3 Web Services Installation and Configuration Guide document.

Setup File

- The Portal Host is deployed as a zip file (**finPOWERConnectPortalHost3.zip**). The latest version can be obtained from Intersoft Systems.
- The zip file contains a **finPOWERConnectPortalHost3** folder which contains the entire Web Services Web application.
- This setup file should be extracted to a folder on either the Web Server or some other media which can then be used to copy the files to the Web Server, e.g., a USB flash drive or network location.

New Installation

See the "New Installation" section in the finPOWER Connect 3 Web Services Installation and Configuration Guide.

The only difference is that the alias for the application should be more applicable, e.g., **ClientPortal** or, as may be the case for a Portal, this may be the root website.

Updating an Existing Installation

This section assumes that all the steps listed in the [New Installation](#) section were followed when first installing the Web Services.

- Take a backup copy of your existing configuration file **config.xml** in the **App_Data** folder.
- Use Windows Explorer to remove all folders under the existing Web Services Web Application folder.
- Using Windows Explorer, copy the files from the setup's finPOWERConnectPortalHost3 folder into the Web application folder.
- Copy your backed up configuration file back into the **App_Data** folder.

WARNING: Failure to take a backup copy of your existing configuration file will result in the finPOWER Connect Portal Host having to be re-configured.

Enforcing HTTPS for Secure Access

See the "Enforcing HTTPS for Secure Access" section in the finPOWER Connect 3 Web Services Installation and Configuration Guide.

Configuration

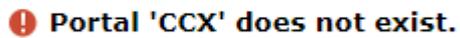
Unlike finPOWER Connect Cloud and finPOWER Connect Web Services which provide an administration facility to configure them, configuration of the Portal Host must be performed manually by using a text editor such as Windows Notepad to edit the **App_Data/config.xml** file.

Only two configuration options are required:

- The URL to Web Services
- The Portal Id

```
<ISKeyValueList version="1.00">
  <Item type="String" key="PortalId">CC</Item>
  <Item type="String" key="WebServicesUrl">http://localhost:51149/ws3/</Item>
</ISKeyValueList>
```

If the Portal Id does not exist in the database that Web Services are connecting to, you will see the following message:

An error message box with a red exclamation mark icon and the text "Portal 'CCX' does not exist." data-bbox="130 342 418 359"/>

❗ Portal 'CCX' does not exist.

WARNING: The Portals URL MUST NOT include a "/api/" portion.