

WEB.EXTERNAL.SETUP

The Manage 2000 web site is designed to be used for both Intranet and Internet access. Multiple web servers may be used to provide access from both inside and outside the corporate firewall. Web site features may be configured by user role providing customers, vendors, sales reps, and internal users each with their own distinct web site map and navigation experience.

This task list may be used to add an externally facing site for customers, and/or vendors and/or outside sales reps.

1. Setup a webserver for access from the Internet

This should be a server class system similar to the web server serving your system users. It should sit in a DMZ area of your network walled off from the Manage 2000 Unidata server by a router with only the specific required ports open. Required ports include http and https ports on the Internet side and Redback ports on the Intranet side.

Minimize IIS features. Remove Example and doc and IIS help sites. Do not install SQLServer, FTP, or any other unnecessary feature.

2. Install the Manage 2000 web site from the installation CD

The install will load required Manage 2000 and Infragistics assemblies, and registry entries and the RedBack RedPage.dll.

3. Clone your internal XXX.MAIN website to your externally facing server

4. Obtain and load a certificate for SSL security.

Installing a certificate and running the web pages using the https protocol in place of the http protocol results in secure sessions with all form data encrypted during transport. If your business data and relationship with your external users are private and valuable then this is well worth doing.

Obtain certificates from an official supplier such as VeraSign.

It is also possible to create your own root authority certificate and then issue self-signed certificates for your webserver. This works well for testing and development but will be more cumbersome in production for all concerned than simply buying an official certificate from a certifying agent. OpenSSL is one option for creating your own certificates if you decide to do so.

5. Configure navigation for particular roles

1. Use DEFINE.WEB.LINKS to configure role specific root menus for the global sitemap and any exposed local portal menus for each external role.

1. Standard role based sitemaps are provided for external users in GLOBAL*CM, GLOBAL*VEN, and GLOBAL*SLSREP.
2. Standard role based local portal menus for external users are provided in CUSTOMER*CM, WELCOME*CM, WELCOME*VEN, and WELCOME*SLSREP

Remove undesired menus and functions from external menu trees using DEFINE.WEB.LINKS and MENU.BUILD. Add any new functions or menus you wish to make available to each role. Many customer and vendor related pages check the data being displayed to customers or vendors to ensure that the data is about them.

2. Use CNT.SYSTEM.REFS to assign role specific web preferences

Standard Short Cut Menus are supplied named CustomerShortCuts, VendorShortCuts, and SalesRepShortCuts. These may be linked to the role using the preference code 2 Shortcut Menu and modified as desired.

6. Setup Manage 2000 security for specific roles

Create a security group that matches the role (CM, VEN, SLSREP) and assign functions or menus to each group.

7. Disable MT/ERPBusinessObjectService.

ERPBusinessObjectService is a powerful webservice for use in intranet integration projects. It is inappropriate as a web service available to the open Internet. The simplest way to disable it is to edit the virtual directory root web.config file and remove ERPBusinessObjectService from the 'DoNotCheckSecurity' and 'DoNotAuthenticate' keys in the 'appSettings' element.

```
<add key="DoNotCheckSecurity" value="MT/ShowError,MT/Hyperquery,
  MT/Help,MT/SearchMetaData,MT/SearchDisplay, MT/CrossReference,
  MT/Calendar,
  MT/ERPBusinessObjectService,MT/Registration, MT/GetFileNames,MT/Login">
  </add>
  ...
  <add key="DoNotAuthenticate" value="MT/ERPBusinessObjectService,
  MT/Registration,MT/GetFileNames,MT/Login">
  </add>
```

8. Add PageViewFilters for specific roles

Use PageViewFilters to hide fields and suppress links to other web functions that users in this role should not see.

9. Register web users.

Web logins may be assigned by you in CONTACTS and emailed to your customers, vendors, or sales reps. Or you may have each person use the Registration page to self-register. This will create contact records that will have to be reviewed and connected to specific customer numbers, vendor numbers, or sales rep codes in Database Relationships screen. ECA ROI_120 may be activated to alert the Database Relationships administrator that a new user is registering to use the external portal and requires attention.

SEE ALSO

INTRO.WEB.COURSE for tailoring options

WEB.ADMIN.COURSE for administration tasks