Provisioning and Portals — Portal Server

Client Installation Guide

Release: 10.0

Revision: 04.02

Describes the steps for installing the P&P-PS client application.

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Contents

What's new for P&P-PS client users in release 10.0

The P&P-PS in release 10.0 includes new and changed features.

Revision 04.02

July 30, 2021. P&P-PS 10.0

Added the ability installer the Admin UI client using a self-extracting file

Added new section Using an Application Installer to Install the Client to provide the option to use an application installer file to install the Admin UI client since Java 11 does not support Java WebStart.

Revision 04.01

April 29, 2019. P&P-PS 10.0

Updated branding and product name

Rebranded to Ribbon and Provisioning and Portals – Portal Server (P&P-PS).

Introduction

Provisioning and Portals – Portal Server (P&P-PS) uses the Java Web Start technology to automate software installation and distribution for the application fully. Web Start is a standard component of Sun Java. After installing Java, the P&P-PS installation occurs automatically, through a web browser, and there is no need to upgrade the P&P-PS software for new releases or patches. With Java Web Start, users receive a fully functional client application without the management overhead of traditional client/server software.

Note: The original Web Start shortcut found on the Window's Start Menu is removed with the Java 1.6 installation. A standard component of Sun's Java management of the Java application is the Java Control Panel and is accessed through the Windows Control Panel (Start Menu>>Control Panel>>Java).

PC hardware and software requirements

The following sections list the minimum and recommended requirements for running the Java client, the Self-Care UI, the Small to Medium Business UI, the Service Provider UI or the API for the P&P-PS application.

The minimum requirements are for an infrequent user of the P&P-PS application, for example a user who requests a report occasionally. The recommended requirements are for an everyday user of the P&P-PS product application.

Note: These are P&P-PS requirements only. Your operating system and other applications will have their own requirements.

Hardware

Description	Requirements
CPU	733 MHz or Higher.
Physical RAM	Includes both application & operating system requirements: Windows 7, 8, and 10 – 4 GB.
Hard disk free space	100 MB Free Disk Space.
Monitor/video card	Screen resolution requirement is 1024 x 768.

Software

Description	Version Information
Windows	Windows 7, 8, and 10
Acrobat Reader	10 or higher **Note***:* When viewing the help docs make sure the Adobe Reader or Adobe Acrobat Professional program has the following option set: Edit>>Preferences>>Documents>>PDF/A Mode is set to NEVER
Web browser	Supported browsers are: • Chrome 46.0 • Firefox 41 • Internet Explorer 11 • Microsoft Edge with Windows 10 **Note**: Browsers change frequently, in particular Chrome and Firefox which generally auto-update every six weeks. It is not feasible for P&P-PS to support every new version or react immediately to issues with new versions. **Note**: P&P-PS requires cookies to be enabled in the browser, as the application depends on them for authentication and session management.
Flash Player	10.2 or higher
Java	Java Installed version 1.8. See Appendix A: Configuring Java for information on configuring Java for your PC.

Note: For all Windows operating systems (OS), Administrator privileges may be required to install Java Runtime Environment (JRE). After installing these, a normal user can download and run a P&P-PS client.

Windows settings and considerations

The following are considerations and settings when installing on a Windows PC:

• Must be logged in as an Administrator on the PC for a successful Java installation

- In Windows 7, 8, and 10, the user must log in as an administrator to proceed with the installation of Java. Once Java is installed, the P&P-PS Client does not require the user to be logged in as an administrator in order to complete the installation.

Enabling cookies in the browser

Chrome 46.0+

1. Select **Settings**.
2. Click on **Privacy**.
3. Click the **Content Settings…** button.
4. Under **Cookies**, ensure the option **Allow local data to be set** is selected.
5. Click **Done**.

Firefox 41+

1. Go to the "Tools" menu.
2. Select "Options".
3. Select the "Privacy" icon in the left panel.
4. From the History, Firefox will dropdown, select "Use custom settings for history".
5. Check the box corresponding to "Accept cookies from sites".
6. Close the browser tab.

Microsoft Internet Explorer 11.0+

1. Select "Internet Options" from the Tools menu.
2. Click on the "Privacy" tab.
3. Click the Advanced button.
4. By default, the browser should be set to Accept First-Party and Third party cookies.

Chrome settings and considerations

To have Chrome automatically open certain file types after the download is complete, do the following:

1. Click the arrow next to the file button in the downloads bar.
2. Select 'Always Open Files' of this type.

Note: To prevent potentially malicious files from automatically downloading to your computer, this option is not available for executable file types, such as those with .exe, .dll, or .bat extensions (for Windows), and .dmg extensions (for Mac).

To clear auto-opening settings such that Chrome does not automatically open certain file types, do the following:

1. Click the wrench icon on the browser toolbar.

2. Select 'Settings' (or 'Preferences' on a Mac).

3. Select 'Show advanced settings…'.

4. In the 'Downloads' section, click 'Clear auto-opening settings'.

5. Click 'Close' when you are done.

Internet Explorer security settings

To ensure P&P-PS launches properly In Internet Explorer:

1. Select **Tools** - **Internet Options**.

2. Click the **Advanced** tab.

3. Under **Security**, verify that option **Do not save encrypted pages to disk** is <u>not</u> checked.

Installing the P&P-PS Client

Install the P&P-PS client using one of the following:

- Using an Application Installer to Install the Client, or
- Using a Java Installer to Install the Client.

Using an Application Installer to Install the Client

Installing the P&P-PS client using this method requires the user to download an application installer file and double-clicking on it to install the application.

Prerequisites

- You are logged into a network that has access to the P&P-PS Server.
- You have a web browser.
- The PC meets the minimum hardware requirements. See PC hardware and software requirements.
- You have administrative privileges on the PC for the installation.

Typical installation time

Local network: 5 - 10 minutes

Installing the P&P-PS Client

To install the P&P-PS client:

1. From your web browser, enter the web address provided to access the P&P-PS WebStart page and press **Enter**. The P&P-PS WebStart page opens

   Note: The following illustration is only an example. Your company may supply its own page with some or all of the same links.

Provisioning and Portals WebStart

Provisioning & Portals

Click Here to Install Provisioning and Portals® Client
Click Here to Run Provisioning and Portals® Client with Java webstart
Java Webstart Info
Provisioning and Portals Documentation

2. Click on the **Click Here to download Provisioning and Portals Client** link to download the application installer.

3. A **Security Information** dialog window may open to ensure that you wish to continue. Click '**Yes'** to continue.

4. An application installer file downloads.
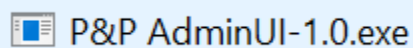
5. After the application installer file downloads, double-click on it to install the application.

6. Open the Admin UI (AUI) by running the **P&P AdminUI** shortcut located on the desktop as Administrator.

7. Enter your PS URL information, your ID, and Password to log into the AUI.

8. Click **Login**. After successfully logging in, the AUI checks for a new version and downloads it if one is available, and then the AUI relaunches. If no new version is available, the AUI launches.

Using a Java Installer to Install the Client

Installing the P&P-PS client using this method requires the user to run a Java installer file to install the client.

Prerequisites

- You are logged into a network that has access to the P&P-PS Server.

- You have a web browser.

- The PC meets the minimum hardware requirements. See PC hardware and software requirements.

- You have administrative privileges on the PC for the Java installation.

Typical installation time

Local network: 5 - 10 minutes

### Installing the P&P-PS Client

To install the P&P-PS client:

1. From your web browser enter the web address provided to access the P&P-PS WebStart page and press **Enter**. The P&P-PS WebStart page opens

   Note: The following illustration is an example page. Your company may supply its own page with some or all of the same links.

Provisioning and Portals WebStart

Provisioning & Portals

Click Here to Install Provisioning and Portals® Client
Click Here to Run Provisioning and Portals® Client with Java webstart
Java Webstart Info
Provisioning and Portals Documentation

2. Download and install the JRE from the **Java Webstat Info** link.

3. Click on the **Click Here to Install Provisioning and Portals Client with Java webstart** link to download the pro.jnlp file.

4. Click **Open** on the pro.jnlp in **Downloads**.

5. A **Security Information** dialog window may open to ensure that you wish to continue. Click '**Yes'** to continue.

6. If an Active X control is needed to complete the installation, an **Information Bar** window provides information about the Active X control prompt at the top of the Internet screen.

7. Click **OK** in the **Information Bar** window to continue.

8. Move to the top of the Internet Explorer window and click on the yellow bar across the top. When the bar is selected, the color changes to blue and a drop down menu opens with choices for installing the Active X control.

9. Click the 'Install ActiveX Control' from the menu. The ActiveX Control installs.

   A Security Information dialog window may open to ensure that you wish to continue. Click **Yes** to continue.

10. The **Internet Explorer - Security Warning** window opens with the option to install. Click **Install** to continue.

11. The **Downloading Java Installer** window displays and shows the installation download progress bar and estimated time left for the installation.

12. Once the download is complete, the **Java Setup** - **Welcome** window displays. Click '**View** the License Agreement'

13. Click **Accept** to continue.

14. Java Setup and Toolbar Option: Once the License agreement is accepted, the Java Setup Toolbar window provides a wizard-type interface to complete the installation.

    Note: If you do not want to install the new Toolbar, click the checkbox to disable the toolbar installation during the setup process.

15. Click the 'Next' button to continue. The **Java Setup - Progress** window shows the status of the Java installation.

16. When the Java installation and setup are complete, the **Java Setup – Complete** window displays. Click the '**Finish'** button.

17. The Java window flashes showing that Java is launching.

18. A **Warning – Security** window may display indicating the application's digital signature has been verified and asks 'Do you want to run the application?'

   'Always trust content from this publisher' checkbox provides the option to skip this window and allow the application to run without answering each time the application is launched. If the checkbox is checked, this window will be skipped. If this checkbox is unchecked then each time the P&P-PS application is launched, this window will confirm that you wish to run the application.

19. Click the '**Run'** button to continue.

20. P&P-PS Login Screen: The P&P-PS **Login** window displays.

21. Enter your ID and Password.

22. Click **Login**. The P&P-PS application launches.

Logging in to the application after initial installation

1. For subsequent logins, return to the webpage that has the 'Click Here to Run P&P-PS Client'.

2. Click the link to **Install/Run the P&P-PS Client**.

Logging into the application when a proxy is used

1. Return to the webpage that has the 'Click Here to Install/Run P&P-PS Client'.

2. Click the link to Install/Run the P&P-PS Client.

3. The Security Warning dialog window opens. Click **Continue** and the Starting application dialog displays.

4. A second Security Warning dialog window opens. Click **Run** and the downloading application dialog displays.

5. The **Login** dialog window opens. Enter the Username and Password.

6. Click **OK** and the downloading application dialog displays. The P&P-PS application launches.

Obtaining Java Webstart Info

1. Return to the webpage that has the **Click Here to Run Provisioning and Portals® Client with Java webstart** link.

2. Click the **Java Webstart Info** link. The Java WebStart Info page provides two separate locations to download the latest version of Java. Choose the one appropriate for your PC.

Appendix A: Configuring Java

Use the information in this appendix to determine the version of Java on your PC and configure Java for use with the P&P-PS client. For more information on downloading and configuring Java software, see www.Java.com. For specific P&P-PS client configuration issues, contact RIBBON customer support.

Launching the Java Control Panel

To launch the Java Control Panel:

1. Click Windows **Start** menu>>**Control Panel**.

2. Click **Programs**

3. Click on the **Java** icon. The **Java Control Panel** window opens.

   or

   From **Start** > **Run,** type in Configure Java. The **Java Control Panel** window opens.

Determining the current version of Java you are running

To determine the current version of Java you are running:

1. On the **General** tab, click the **About** button to open the **About Java** window view the current version of Java you are running.

Configuring the network proxy settings

Trouble downloading a client may result from an incorrect proxy setting. To configure the network proxy manually:

1. On the **General** tab, click the **Network Settings** button to open the **Network Settings** dialog window.

2. In the **Network Settings** dialog window, click the **Use Proxy Server** option.

3. Enter the values for the Address and Port field. Please consult your Network Administrator for values appropriate to your network.

4. Click **OK** to save your proxy settings. If changing your proxy settings (as described above) does not allow you to download the P&P-PS client, report the errors to your RIBBON Technical Support representative.

Configuring the management of temporary internet files

To configure the management of temporary internet files:

1. On the **General** tab, click the **Settings** button to open the **Temporary Files Settings** dialog window to configure the management of temporary files.

Java updates

The **Update** tab is where you can select if you want Java to check for updates automatically. Alternatively, you can configure notification of updates and downloads.

To configure or check for Java updates:

1. On the **Update** tab, click the **Advanced** button to access the settings for automatic update

   Follow your company policy regarding Java updates. However, RIBBON does not recommend that you automatically install every available Java update.

Viewing and managing Java Runtime versions on your PC

To view and manage Java Runtime Environment versions on your PC:

1. Click on the **Java** tab and then the **View** button. The Java Runtime Environment versions that are installed for your environment are listed in the **User** or **System** tabs.

   - The **User** tab displays a list of all the local JRE's loaded on your PC.

   - The **System** tab has the actual Java version of the WebStart Application. You can have multiple versions of JRE loaded under the **User** section but you will typically only see one version under the **System** tab, which represents the loaded Java version for the WebStart application itself.

Advanced Tab

Use the 'Advanced' tab displays a variety of options that control different types of settings and defaults.

Clearing Java Cache

To clear Java Cache on your PC:

1. From the **General** tab, click the **Settings** button to open the **Temporary Files Settings** dialog window.

2. Click **Delete Files** button. The **Delete Files and Applications** window opens.

3. To clear the Cache, select the category from the list and click the **OK** button..