



Training Guide Series

CYMA User Portal Installation Guide

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Section 1: Important Notes and System Requirements

Important Notes

1. CYMA User Portal Version 22 is designed to operate with CYMA Version 22.
2. CYMA and the User Portal do not need to be installed on the same computer, but if the User Portal server is a different computer than CYMA, the Actian PSQL database engine Version 12.0 or greater must be installed on the computer which acts as the User Portal server. You can install the Client, Workgroup or Server version of PSQL. If installing Workgroup or Client, select the option to install as a service. If CYMA and the User Portal are on the same machine and if the database engine has been previously installed in order to operate CYMA, then no further action regarding the PSQL database is required.
3. The User Portal is for use on computers with Actian PSQL V12 or greater installed and will not work with previous versions of PSQL.
4. Please seek the advice / assistance of CYMA or an IT professional before installing. This document assumes that the installer has a working knowledge of Internet Information Services (IIS) and an understanding of computer network communication.

System Requirements

Server:

- Windows Server OS that supports IIS 7 or later.
- IIS 7 or later.
- SSL Certificate (optional).

Client:

- Chrome (recommended)
- Firefox
- Microsoft Edge
- Safari
- Browser resolution 1280x800 or higher.

NOTE: Ensure browser is updated to the most current version.

Recommendations

Use SSL and purchase a secure certificate if the User Portal will be accessed from outside the company network.

Section 2: New Installations

This section is for customers with an existing CYMA installation who are installing the User Portal for the first time.

1. Install IIS 7.x or later on the Server (this may be the same machine that hosts CYMA) and ensure that both Application Development and Static Content (under Common HTTP Features) are enabled.
2. If necessary, install the PSQL database engine on the Server. If the Server is the same machine as CYMA and if PSQL is already installed, no action is necessary. NOTE: The User Portal will only function with PSQL V12 or later.
3. Install as follows by choosing setup.exe. We recommend you choose the default location for installation files. The installation program will install the User Portal, Crystal Reports runtime components and the Microsoft .NET Framework 4.8. Reboot the server after the installation is complete.
4. Check the following:
 - a. Ensure that the IIS User group has write privileges to the folder named "App_Data"
 - b. Run IIS and verify that a CYMA User Portal application pool has been created.
5. In the PSQL Control Center verify that an entry exists for the main CYMA program (CYMASYS) and for each of your CYMA companies. These should have been created automatically by the CYMA Version 22 installation. If entries do not exist, run the 'Update SQL Database Connections' utility on the host machine where the main CYMA program is installed.
6. The next step is to configure the User Portal to access CYMA data:
 - a. Run IIS and select the CymaUserPortal website under "websites."
 - b. Double - click on Configuration Editor under the Management section in the middle pane. In the Section field select Connection Strings and click "Edit Items" in the right panel.
 - c. If the main CYMA program is located on a different server than the User Portal, edit the System Connection.
 - i. Select the connectionString with the name of CYMASysConn
 - ii. In the Properties box, find the connectionString value. Change localhost to the server name or IP of the CYMA server.
 - d. Modify the web.config. The file will be in the directory where the User Portal was installed. This file can be opened with Notepad or any text editor.
 - i. If CYMA Not-For-Profit edition is installed, change the NFPCompany key to True.

Section 3: Upgrade from CYMA 21.x and Earlier

If you are currently using the User Portal, follow these steps to upgrade.

1. Make sure everyone is logged out of CYMA.
2. Upgrade CYMA following the instructions provided with the CYMA installation. The installation of CYMA will stop the PSQL service or services to ensure files needed by the User Portal are properly updated.
3. Upgrade the User Portal as follows:
 - a. Save the existing web.config file from the directory where the existing User Portal is installed. Due to differences between versions of the User Portal this file will need to be reconfigured.
 - b. Uninstall the previous version of the User Portal.
 - c. Run the Setup.exe.
 - d. If you are not installing the User Portal in its default location then browse out to its existing location. Click Next.
 - e. This will install:
 - i. The User Portal program.
 - ii. Crystal Report runtime components.
 - iii. Microsoft .NET Framework
 - f. Click Finish.
 - g. Edit the new web.config following the instructions in Section 2: New Installs – Step 6.
4. Verify that the User Portal is working by logging in with a user name and password of a user that has access.

Setting Up the User Portal to Allow External Access

General Information

There are many ways to allow access to the User Portal from the internet. These are optional steps and are not required, if users will be accessing the User Portal only from the local network. As every situation is different and every piece of hardware has different options, these instructions are provided as a guideline. Please consult an IT professional if you need assistance with your setup.

DNS (Domain Name System)

DNS is a hierarchical distributed naming system for computers, services, or any resource connected to the Internet or a private network. DNS provides a way that a user can type in a more easily remembered name (ex. www.cyma.com) and it directs the user to an IP address associated with a server. DNS is usually provided by the same services that hosts a company's website.

Port Forwarding

Port Forwarding is a methodology that allows the configuration of internet traffic through a router. Routers need to be configured to allow traffic from the internet to the IIS server. The standard HTTP port is 80 and the standard HTTPS port is 443.

Secure Certificate

A secure certificate is an electronic document used to prove ownership of a public key. The certificate contains information about the key, the owner's identity and the entity that verified the certificate contents. It is installed and used to show the end user that the website is valid. A Secure Certificate can be purchased from a certificate authority.

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When contacting CYMA for technical support, please have the following information available:

- CYMA Account Number (if known)
- Windows Version
- Network Operating System (if applicable)
- CYMA Version

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