

finPOWER Connect Cloud 3 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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Version History

Date	Version	Name	Changes
04/08/2016	3.00	PH	Created.
12/10/2016	3.01	PH	Updated to include information on Documents.
10/03/2017	3.02	PH	Updated for release to Website.
02/02/2018	3.03	PH	Updated for release 3.1.
14/01/2019	3.04	PH	System requirements updated.
13/02/2020	3.05	PH	finPOWER Connect Cloud Configuration form updated.
25/05/2020	3.06	PH	Reviewed and updated for 3.03.02 release.
07/08/2020	3.07	PH	Removed references to IE 11.
02/11/2020	3.08	PH	Added "local access only" option for Web Administration.
14/06/2021	3.09	PH	Cookies section added.
28/06/2021	3.10	PH	Added important notes about using different IIS Application Pool from Web Services.

Introduction

This document describes the steps to be taken to install and configure the finPOWER Connect Cloud application (from herein, often referred to as "finCC" to avoid confusion with the Desktop version of finPOWER Connect).

NOTE: This deals with the basic installation and configuration of the Web applications and some very basic finPOWER Connect configuration options.

See the **finPOWER Connect Cloud 3 Customisation Guide** document for information on customising the application.

finPOWER Connect Cloud is a Web application that runs under Microsoft's Internet Information Services (IIS) Web Server software. It works in conjunction with the finPOWER Connect Web Services which should be installed separately.

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

NOTE: This document should be used in conjunction with the **finPOWER Connect 3 Web Services Installation and Configuration Guide** since much of the installation is the same.

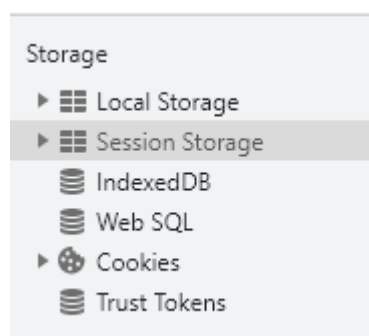
Many sections refer to the corresponding section in the Web Services document to avoid either document becoming out-of-date.

Cookies

Like most web applications, finPOWER Connect Cloud uses cookies to some degree.

IMPORTANT: Our cookies are not used for tracking. They are used to provide a login mechanism and to enhance the user experience.

In Chrome or Microsoft Edge, you can see the cookies that we use by pressing F12, selecting the Application tab and looking at both the "Session Storage" and "Cookies" entries:



Under **"Session Storage"**, you may see the following (depending on your configuration):

- 2FAEntered
 - This simply stores a "y" if the User has signed on by entering Multi-Factor Authentication (MFA) credentials. This is used when the User's session expires to prompt the User that they will need to enter another MFA code to sign back in.

Under **"Cookies"**, you may see the following:

- _highDpi

- This will be set to "true" or "false" depending on whether a high-DPI (retina) display has been detected. This is sent with every request to ensure that higher resolution versions of images and icons are delivered where possible.
- finCC_SessionId
 - This is simply the ASP.NET Session Id. By default, this cookie would be named "ASP.NET_SessionId". We simply assign it a custom name.
- Long named entry such as "tx+9jTWtxAB+sgqZIVIXHI3eeFwXWHLu+VRhD1fkcVNQAAwYJDA8SFRgb"
 - This entry stores encrypted information relating to the current User's login status.
 - ✦ There is no fixed encryption key for Web Services tokens, it is based on the Web Subscriber's Secret Key (which is configured within finPOWER Connect, Tools, Web, Web Subscribers) and, also a "Session Key" defined in Web Services.
 - Either of these keys can be regenerated at any time thereby invalidating any current login tokens.

NOTE: When we utilise external libraries such as Google Charts or Google Addressing, these may create their own cookies. These are nothing to do with finPOWER Connect Cloud.

System Requirements

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

Setup File

- The Web Services are deployed as a zip file (**finPOWERConnectCloud3.zip**). The latest version can be obtained from Intersoft Systems.
- The zip file contains a **Readme.htm** file detailing the version and any finPOWER Connect Cloud-specific Knowledge Base articles.
 - ✧ **NOTE:** Since finCC connects to Web Services which itself uses the finPOWER Connect business layer, most fixes will be listed in the Knowledge Base under finPOWER Connect or finPOWER Connect Web Services.
- The zip file contains a **finPOWERConnectCloud3** 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., **finPOWERConnect3** or **finCC3**.

IMPORTANT: If you are running finPOWER Connect Cloud and Web Services on the same machine, ensure each is using its own, independent IIS Application Pool

Updating an Existing Installation

This section assumes that all of 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 finPOWERConnectWS3 folder into the Web application folder.
- Copy your backed up configuration file back into the **App_Data** folder.
- Ensure IIS has access to the **App_Data** folder as per the [Allowing Access to Files in the App_Data folder](#) section.

WARNING: Failure to take a backup copy of your existing configuration file will result in finPOWER Connect Cloud 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.

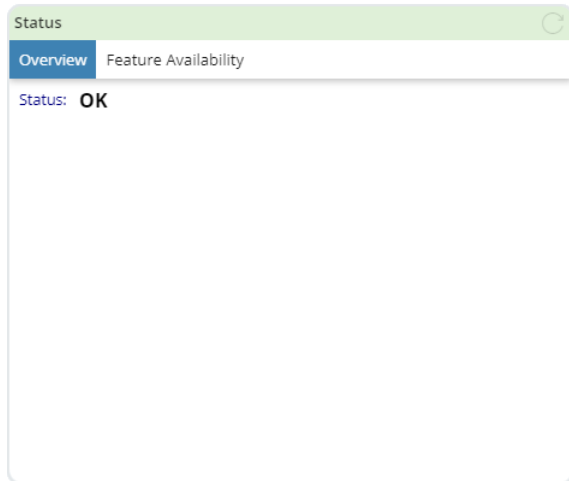
Web Configuration

Configuration details are stored in the **App_Data/config.xml** file. Note that this file is not included with the setup but is created when settings are first configured.

An administration facility is provided to allow updates to this file.

The administration facility uses session state to keep the user logged in. By default, the user will be logged out after 20 minutes of inactivity.

The Status widget allows you to quickly see the current state of finPOWER Connect Cloud.

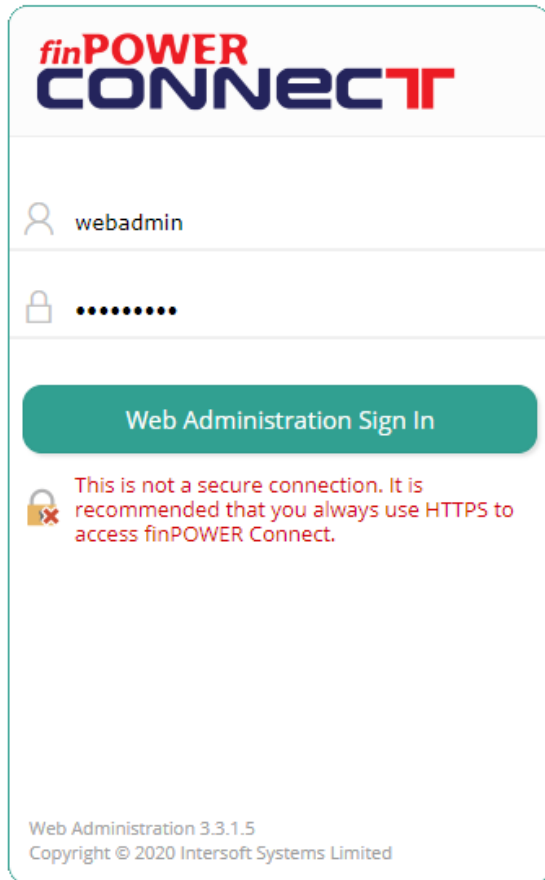


NOTE: When a new finPOWER Connect Cloud installation is first performed, the configuration file will not exist in the App_Data folder.

Upon first saving the configuration file, e.g., by setting Database Connection details, the IIS application may restart resulting in a 401 error in the status bar. Simply sign out and sign back in again if this happens.

Signing In to the Administration Facility

- Using a modern Web Browser (e.g., Google Chrome, the latest version of Microsoft Edge), navigate to the **/WebAdmin** page.
- Sign in using a Web Administration User Id or **webadmin** and a Password **password**.



The screenshot shows the login interface for finPOWER CONNECT. At the top is the logo with 'finPOWER' in red and 'CONNECT' in blue. Below the logo is a user input field with a person icon and the text 'webadmin'. Underneath is a password input field with a lock icon and a series of dots. A green button labeled 'Web Administration Sign In' is positioned below the password field. A warning message with a red lock icon and an 'x' states: 'This is not a secure connection. It is recommended that you always use HTTPS to access finPOWER Connect.' At the bottom left, the text reads 'Web Administration 3.3.1.5' and 'Copyright © 2020 Intersoft Systems Limited'.

- If this is a new installation of the Web Services, the **Status** widget's heading will be pink and the widget will display a warning, e.g., "Configuration file does not exist."
 - This warning can be ignored since the configuration file (App_Data/config.xml) will be created as soon as any of the settings, e.g., the Web Services Settings) are first edited and saved.
- Other warnings should not be ignored, e.g., if the App_Data folder has the incorrect Windows permissions:

Status

Overview


Feature Availability

Status:

WARNING

Message:

Configuration file is read-only.

 This may be due to Windows permissions on the folder in which the configuration file is stored.

Configuration

- finPOWER Connect Cloud must be configured to connect to the finPOWER Connect Web Services.
- This is done either via the "Edit" button on the **Configuration** widget or via the **Main Menu, Configuration** option.

The screenshot shows a 'Configuration' dialog box with a teal header bar containing the title 'Configuration' and a close button. The dialog is divided into three sections: 'Web Services URL', 'Web Subscriber details', and 'Security details'. The 'Web Services URL' section has a 'URL:' label and a text input field containing 'http://localhost:51149/Ws3/Api/'. Below it is a checked checkbox labeled 'Disable Client Certificate validation for testing of self-signed SSL certificates?'. The 'Web Subscriber details' section has a 'Subscriber Id:' label and a text input field containing 'DEMO', and a 'Secret Key:' label and a text input field containing '11111111111111111111111111111111'. The 'Security details' section has two checked checkboxes: 'Allow unsecure (HTTP) access?' and 'Allow local access only to Web Administration, i.e., only from a browser running on the web server?'. At the bottom of the dialog are four buttons: 'Ping', 'Verify', 'Cancel', and 'Save'.

Configuration

Web Services URL ⓘ

URL:

☒ Disable Client Certificate validation for testing of self-signed SSL certificates?

Web Subscriber details

Subscriber Id:

Secret Key:

Security details

☒ Allow unsecure (HTTP) access?

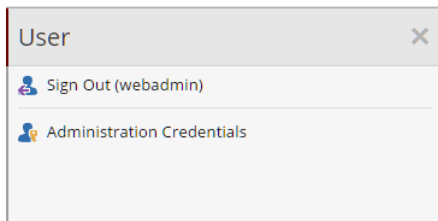
☒ Allow local access only to Web Administration, i.e., only from a browser running on the web server?

Ping Verify Cancel Save

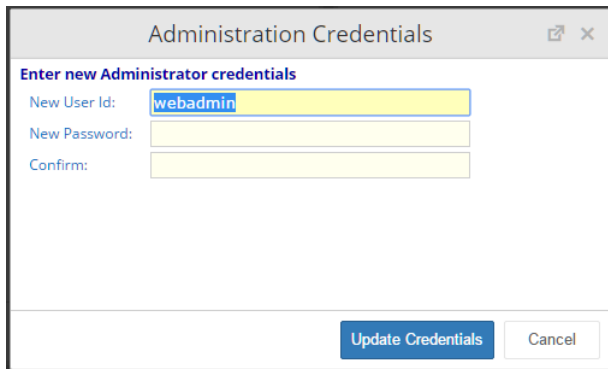
- The "Security details" section allows you to determine whether access to finPOWER Connect Cloud is defined over an unsecure (HTTP) connection and also whether to restrict access to the Web Administration facility to a browser running on the web server.

Changing Administration Credentials

- From the User menu, select **Administration Credentials**.



- You can change the Administration User Id from the default value of **webadmin** and also update the password from the default of **password**.

A screenshot of the 'Administration Credentials' dialog box. The title bar says 'Administration Credentials' with a close button (X) and a maximize button. The main content area is titled 'Enter new Administrator credentials'. It contains three input fields: 'New User Id:' with the value 'webadmin' selected, 'New Password:', and 'Confirm:'. At the bottom, there are two buttons: 'Update Credentials' and 'Cancel'.

WARNING: The menu option will be disabled if the configuration file is read-only. This is usually due to the incorrect Windows permissions being applied to the App_Data folder.

NOTE: If you forget the administration credentials, you can reset them to the defaults (webadmin and password) by manually editing the App_Data/config.xml file and removing the following nodes:

WebAdminUserId
WebAdminPassword

Production Setup and Configuration

When moving to a production environment, setup of the Windows Server hosting both finPOWER Connect Cloud and the Web Services must be performed by a qualified network administrator familiar with the installation and configuration of Windows Server, IIS and network security.

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

NOTE: This section is provided for informational purposes only and not as a guide for setting up a Web Server for use in a live, production environment.

finPOWER Connect Desktop Configuration

By default, finPOWER Connect Desktop must be configured correctly to allow certain functionality to be available to finPOWER Connect Cloud.

The **Tools, Web, finPOWER Connect Cloud Configuration** form has a checkbox on the **General** page that shows finPOWER Connect Cloud-specific information on other forms:

The screenshot shows the 'finPOWER Connect Cloud Configuration' dialog box with the 'General' tab selected. The left sidebar contains a tree view with categories: General, Theme, Pages, Search, Menus, and Forms & Act... The 'General' category is expanded, showing sub-items: General, Security, Sign-In Page, Options, and PWA. The main area of the dialog displays the following content:

- General**
General finPOWER Connect Cloud settings.
- You can run the finPOWER Connect Cloud Configuration Wizard to initialise a new installation.**
Wizard
- Show finPOWER Connect Cloud-related Settings on relevant forms.**
☒ Show Cloud-related Settings?
- Specify a Title for the Website.**
Website Title:

At the bottom of the dialog, there are buttons for 'Export', 'Import', 'OK', 'Cancel', and 'Apply'.

Documents

- By default, no Documents are available to finPOWER Connect Cloud.
- Any Document that can be published from a Log can be made available to finPOWER Connect Cloud however, only the following types of Document can actually be published from the Web:
 - Email
 - Excel Workbook
 - HTML
 - Log
 - Script
 - SMS
 - Word Document
- Any type of VBA Document cannot be published from finPOWER Connect Cloud.
 - However, a Document Log can be created which can then be published in finPOWER Connect Desktop.
- A Web page is available on the Documents form to configure whether the Document is available to finPOWER Connect Cloud:

