SYSPRO Supply Chain Portal

SYSPRO 8

Reference Guide

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Exploring

Where it fits in?

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the *SYSPRO Avanti* HTML5 user interface.

Adding Portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

Features currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System:

  This lets you collaborate with your suppliers by automating the quote process and enabling suppliers to action an RFQ.

Navigation

The programs related to this feature are accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Administration > Security*

Terminology

Portal User

Portal users are users who have access to the **SYSPRO Supply Chain Portal**.

They are differ from regular SYSPRO operators and are configured and licensed separately based on a named-user license model.

When your system is licensed for a number of **Portal Seats**, an administrator can use the **Portal User Management** program to create and maintain portal users.

> **FOR EXAMPLE:**
>
> If you have a license for `1000 Portal Seats` then you can create and maintain up to 1000 **Portal Users**, each of which can use the **SYSPRO Supply Chain Portal** at the same time.
>
> This has no effect on any other SYSPRO user licenses.

When creating a portal user, you assign an email address as the unique identifier against which the portal user will access the portal.

A unique operator code is generated against which all transaction journals are recorded. This generated operator code is not shown to portal users, but can be viewed from within the **Portal User Management** program and when viewing journals and other logs of using regular SYSPRO functions.

Portal Seat

This is a system-wide number of named-users that can be included in your SYSPRO license.

You can create portal users up to the number of licensed **Portal Seats**.

Each portal user is a single person who has access to the **SYSPRO Supply Chain Portal**.

Starting

Installation considerations

- This feature is installed using the **SYSPRO Installer**.

Prerequisites

Licensing

In order to use the **SYSPRO Supply Chain Portal** you must purchase and configure one or more **Portal Seats** according to the terms of your software license agreement.

In addition, each of the functions available from the **SYSPRO Supply Chain Portal** will require an appropriate SYSPRO module to be licensed.

Currently, the following module license requirements apply:

Request for Quote System

- Purchase Orders

Technology

The following technology prerequisites are applicable to using this feature:

- Microsoft .NET Framework 4.6
- SYSPRO 8 Service Upgrade Manager
- SYSPRO 8 Avanti Initialization Service
- Internet Information Services(IIS) 7.0 Core Web Engine Feature
- Internet Information Services(IIS) 7.0 World Wide Web Publishing Feature

Setup Options

The following setup options must be configured to use this feature:

System Setup

SYSPRO Ribbon bar > Setup > General Setup

EMAIL/SMTP SETTINGS

- SMTP server IP address
- Outgoing email address
- Username

- Password
- Server port
- Use SSL

> 💡 SMTP settings are required for the **Forgot Password** functionality.

Restrictions and Limits

- **Multi-Factor Authentication** and **Single Sign-on** are not currently supported for the **SYSPRO Supply Chain Portal** (i.e. an operator who is configured to use **Multi-Factor Authentication** or **Single Sign-on** won't be able to login to this platform).

- **Portal** operators cannot belong to a SYSPRO Administrative operator group.

- Currently, the **SYSPRO Supply Chain Portal** can only be installed for a single company.

- The ability to customize the logo and background image of the **SYSPRO Supply Chain Portal** is not yet available, but will be included in a later release of *SYSPRO 8*.

- Although technically possible, we don't recommend you duplicate an email address of a portal user amongst non-portal users.

  For this reason the **Portal User Management** program prevents you from entering a duplicate email address amongst all operators (of any type).

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You can restrict operator access to *activities* within a program (configured using the **Operator Maintenance** program).

- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.

- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **eSignature Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.

- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).

- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Solving

FAQs

Portal operators

How do I create a Portal operator?

The following indicates the steps required to create a Portal user that can use the **SYSPRO Supply Chain Portal**:

1. Open the **Portal User Management** program.

2. Select the **Add Portal User** option.

   The **Add Portal User** window is displayed.

3. Select the required template from the list of templates displayed in the **Templates** pane.

   You need to use an operator template to create a **Portal** user.

4. Ensure that the following settings are configured for the operator:

   - Email address

     This must be unique amongst all operators.

   - Password

     The initial password is based on the email address entered in the **Email** field, but can be changed as required.

   - Name

   - Supplier

   - Default company

     This must be specified to ensure that only a single company can be used to login to the portal.

5. Enter any remaining information that you require for the portal operator.

6. Save the portal operator.

7. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.

How do I create a Template operator?

The following describes how to create an operator **Template**. This is required so that you can create Portal users in the **Portal User Management** program.

1. Open the **Operator Maintenance** program.

   > 💡 Reset your toolbar to ensure that all the latest options are visible.

2. From the **Edit** menu, select **Maintain templates**.

3. Enter the template code in the **Template** field on the toolbar and press `TAB`.

4. Enter the following mandatory fields in the **Operator Details** pane:
   - Operator name
   - Operator group

5. From the **E.net** pane:

   a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.

   b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.

   c. Specify the **CUSTOMER SELECTION** as **Selection**.

6. Enter any other information you may require for the operator template, or accept the defaults provided.

7. Save the operator template.

How is the login password generated for portal operators?

When first creating a portal operator, the password is generated using the email address.

You notify the portal user of the login credentials and advise them to change this password (using the **Change Password** option) when they first access the **SYSPRO Supply Chain Portal**.

How do I disable a portal operator from accessing the portal?

From within the **Portal User Management** program, select the **Disable** option against the operator and enter a reason at the **Reason Code** field.

How do I delete a portal operator?

From within the **Portal User Management** program, select the **Delete** option against the operator and enter a reason at the **Reason Code** field.

Can a regular SYSPRO operator login to the SYSPRO Supply Chain Portal?

Only portal users created within the **Portal User Management** program can access the **SYSPRO Supply Chain Portal**.

Portal users are designed to have limited access to portal-specific functions, whereas regular SYSPRO operators have access to a much wider range of functionality.

General

Where do I find the URL for the SYSPRO Supply Chain Portal?

Once you have installed the **SYSPRO Supply Chain Portal** you can view the URL link from the following location of the machine to which the software is installed:

`\inetpub\wwwroot\SYSPROSupplyChainPortal_"companyID"\index.html`

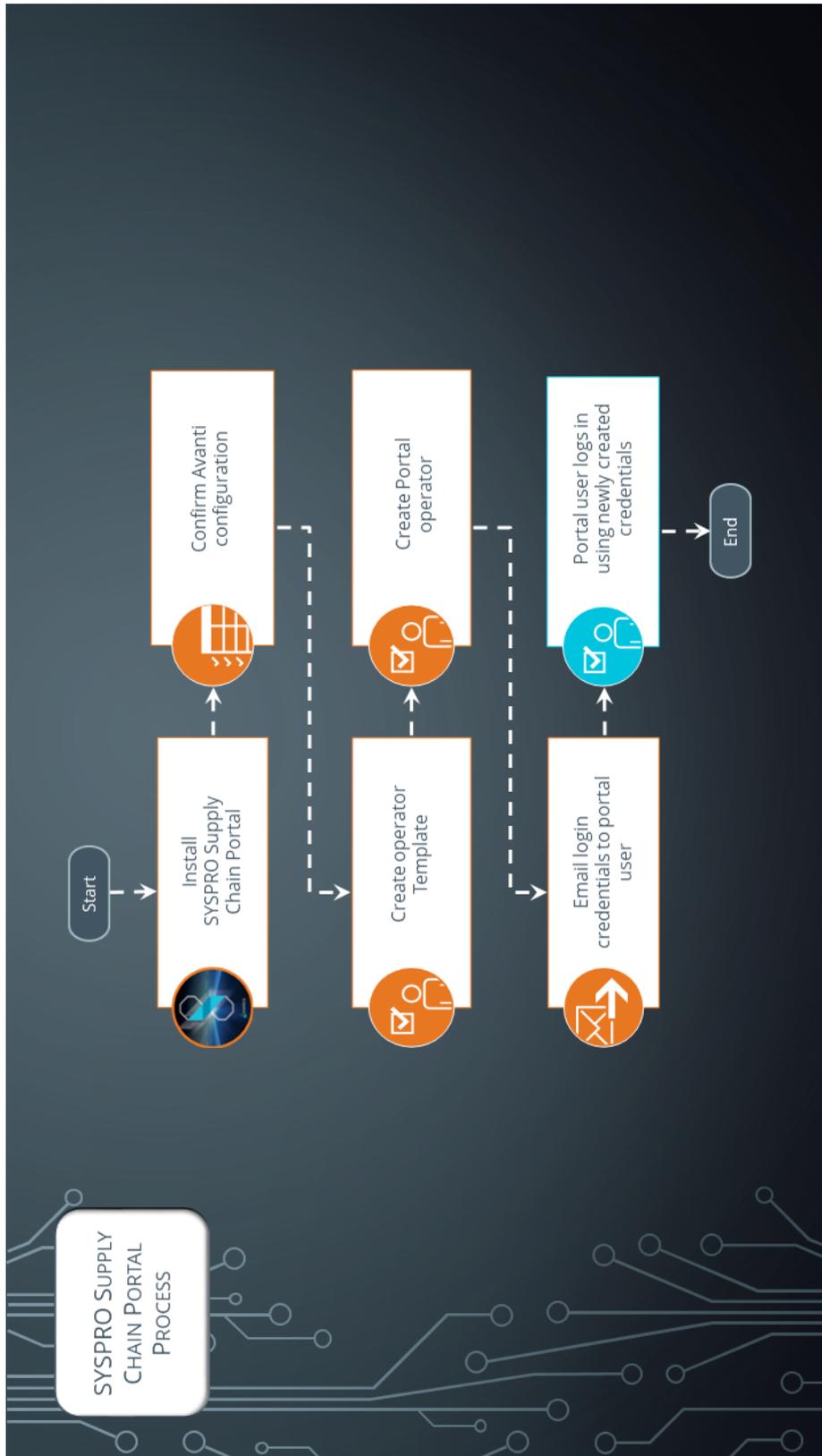However, the URL used for the **SYSPRO Supply Chain Portal** is:

`http://localhost/SYSPROSupplyChainPortal_"CompanyID"`, as configured within the **System Setup** program..

How do I customize the logo and background image of the portal?

This functionality is planned for a later release.

Using

Process

The following depicts the process required to create a **Portal** operator that can use the **SYSPRO Supply Chain Portal**:

> Before proceeding, ensure that you update the **System Setup** program with your new license details that includes the applicable **Portal Seats**.

1. Install the **SYSPRO Supply Chain Portal** using the **SYSPRO Installer** application.

2. Ensure that the **AVANTI EXTERNAL PORTAL ADDRESS** is entered correctly in the **System Setup** program.

   > **FOR EXAMPLE:**
   >
   > `http://localhost/SYSPROSupplyChainPortal_"CompanyID"`

3. The following describes how to create an operator **Template**. This is required so that you can create Portal users in the **Portal User Management** program.

   a. Open the **Operator Maintenance** program.

   > Reset your toolbar to ensure that all the latest options are visible.

   b. From the **Edit** menu, select **Maintain templates**.

   c. Enter the template code in the **Template** field on the toolbar and press ⇥.

   d. Enter the following mandatory fields in the **Operator Details** pane:

   - Operator name
   - Operator group

   e. From the **E.net** pane:

      a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.

      b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.

      c. Specify the **CUSTOMER SELECTION** as **Selection**.

   f. Enter any other information you may require for the operator template, or accept the defaults provided.

   g. Save the operator template.

4. Create a **Portal** operator:

a. Open the **Portal User Management** program.

b. Select the **Add Portal User** option.

   The **Add Portal User** window is displayed.

c. Select the required template from the list of templates displayed in the **Templates** pane.

   You need to use an operator template to create a **Portal** user.

d. Ensure that the following settings are configured for the operator:

   ▪ Email address

     This must be unique amongst all operators.

   ▪ Password

     The initial password is based on the email address entered in the **Email** field, but can be changed as required.

   ▪ Name

   ▪ Supplier

   ▪ Default company

     This must be specified to ensure that only a single company can be used to login to the portal.

e. Enter any remaining information that you require for the portal operator.

f. Save the portal operator.

g. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.

5. Email the following credentials and information to the required portal user:

   ▪ **SYSPRO Supply Chain Portal** URL

   ▪ Username (i.e. email address)

   ▪ Password

Ensure to advise portal users to change their password using the **Change Password** option when they first login to the **SYSPRO Supply Chain Portal**.

> Specific to the **Request for Quote System** feature:
>
> All suppliers are given the same URL, however access is controlled in the background where users can only see quotes pertaining to their supplier.

Once you have created RFQs in the core SYSPRO product and sent the supplier the credentials required to access the **SYSPRO Supply Chain Portal**, the supplier can then use the portal to receive and review the RFQs, as well as submit quotations.

Affected Programs

The following indicates areas in the product that may be affected by implementing this feature:

Portal User Management

Program List > Administration > Security

This is a new program that lets administrators create and manage **Portal** operators.

Things you can do in this program:

- Create **Portal** operators
- Disable **Portal** operators
- Remove **Portal** operators
- Activate disabled or removed **Portal** operators
- Delete **Portal** operators

> All **Portal** operators count towards the license check, even if their status is **Disabled**. However, if the operator status is **Removed**, then it is not counted in the number of seats used.
>
> **Portal** operators flagged as **Removed** are retained for historical purposes to identify operator details when viewing audits and logs.

Operator Maintenance

SYSPRO Ribbon bar > Setup

The program includes the following operator fields that are related to this feature:

> Reset your toolbar to ensure that all the latest options are visible.

- **Operator type**

  Portal indicates that the operator is a named user (used only for the **SYSPRO Supply Chain Portal**)

- **Operator status**

  This indicates the current status of the operator (as recorded in the `OperatorStatus` column of the `AdmOperator` table of your SYSPRO database):

  ACTIVE

  This indicates that the Portal user is active and can log into the **SYSPRO Supply Chain Portal**.

  DISABLED

This indicates the Portal user was disabled using the **Portal User Management** and cannot log into the **SYSPRO Supply Chain Portal**.

REMOVED

This indicates the Portal user was removed using the **Portal User Management** program and cannot log into the **SYSPRO Supply Chain Portal**.

Company Maintenance

SYSPRO Ribbon bar > Setup > General Setup

The program includes a record of how many **Portal seats** are included with your configured license (under the **System Settings** section).

System Setup

SYSPRO Ribbon bar > Setup > General Setup

The program includes a record of how many **Portal seats** are included with your configured license (under the **License setup** section).

System Audit Query

Program List > Administration > Security

The program includes auditing and logging capabilities for all operators that are configured as **Portal** operators.

Hints and Tips

- Template operator codes are prefixed with __Template_ and their operator type records as **Template**.

- We recommend you use **Google Chrome** as your browser.

- Depending on how your security is configured, you'll need to give either the **Portal** operator or its operator group access to the **Supplier Quote Entry** program, so that they can use it in the **SYSPRO Supply Chain Portal**.

- If a portal user selects the **Change Password** option on the landing page of the **SYSPRO Supply Chain Portal**, the operator password in SYSPRO is updated to the new password defined by the portal user.

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