Provisioning and Portals – Portal Server

Client Installation Guide

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

This revision history describes the changes to *Provisioning and Portals — Portal Server Client Installation Guide* (630-01903-01) for the P&P-PS 10.0 software release.

Revision 04.04

September 27, 2023. P&P-PS 10.0

Removed information on installing and configuring Java

Removed information on installing and configuring Java since P&P-PS no longer supports Java WebStart or Oracle Java Runtime Environment (JRE) downloads.

Revision 04.03

June 10, 2022. P&P-PS 10.0

Updated the minimum requirements for running Java client

Updated the minimum PC software requirements from Windows 7 and 8 to Windows 10 and 11 for running Java client on a PC in PC hardware and software requirements.

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).

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Introduction

In this section:

- PC hardware and software requirements
- Enabling cookies in the browser
- Chrome settings and considerations
- Internet Explorer security settings

Provisioning and Portals – Portal Server (P&P-PS) uses Java jpackage to install and distribute the application. Therefore, P&P-PS is compatible with the user's native platform and simplifies installation.

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 10 and 11 – 4 GB.
Hard disk free space	100 MB Free Disk Space.
Monitor/video card	Screen resolution requirement is 1024 x 768.

Software

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Description	Version Information
Windows	Windows 10 and 11
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.

Enabling cookies in the browser

Chrome 46.0+

Start

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+

Start

1. Go to the **Tools** menu.
2. Select **Options**.
3. Select the **Privacy** icon in the left panel.
4. From the **History Firefox will** drop-down, 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+

Start

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.

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Chrome settings and considerations

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

Start

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:

Start

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:

Start

1. Select **Tools** - **Internet Options**.
2. Click the **Advanced** tab.
3. Under **Security**, verify that option **Do not save encrypted pages to disk** is not checked.

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Installing the P&P-PS 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.

Typical installation time

Local network: 5 - 10 minutes

Installing the P&P-PS Client

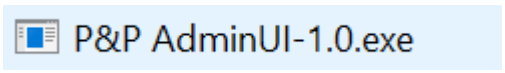
To install the P&P-PS client:

Start

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.

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

4. After the application installer file downloads, double-click on it to install the application.
5. Open the Admin UI (AUI) by running the **P&P AdminUI** shortcut located on the desktop.
6. Enter your PS URL information, your ID, and Password to log into the AUI.
7. 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.

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