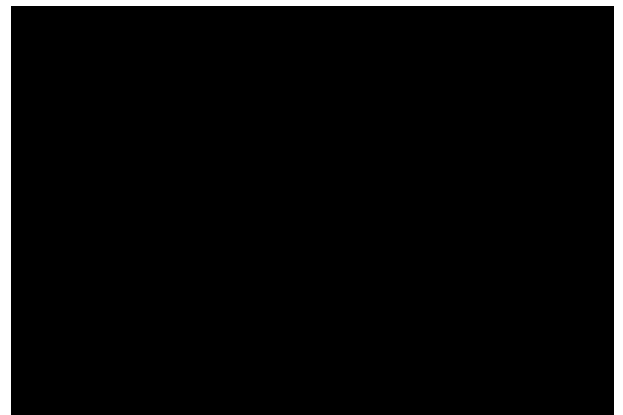




# CLEO Community Management Guide

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# Table of Contents

Section 1: Network Deployment Guide.....	3
1.0 Introduction.....	3
2.0 Key Features .....	4
3.0 Configure a Network Deployment (VLTrader Administrator).....	4
3.1 Export User Configuration Files.....	4
3.2 Create Trading Partner Instructions (optional) .....	6
3.3 Create a Custom Splash Screen (optional) .....	6
3.4 Make User Files Available for Download.....	7
4.0 Configure LexiCom Using the Deployment URL (LexiCom Trading Partner).....	7
Section 2: Certificate Management Guide .....	11
1.0 Introduction.....	11
2.0 Key Features .....	12
3.0 Implement a Certificate Management Plan .....	13
3.1 Deploy Certificates to Trading Partners .....	14
3.2 Certificate Exchange Messaging (CEM) .....	16
3.3 Schedule Certificates for Future Use.....	17
3.4 View Certificate Usage .....	22
4.0 The Certificate Manager.....	23
5.0 Cryptographic Services .....	24
Section 3: Deploy Custom Community Web Portals .....	25
1.0 Introduction.....	25
2.0 Key Features .....	26
3.0 Configure a Web Portal (VLTrader Admin) .....	27
3.1 Customize the Portal Interface.....	27
3.2 Add/Edit Pages (via editor).....	29
3.3 Add/Edit Pages (via URL) .....	31
3.4 Configure a Trading Partner .....	32
3.5 Provide Access to the Web Portal .....	34
3.6 Embed Base Pages into “External” Pages (outside the web portal).....	35
4.0 Using the Web Portal (Trading Partner) .....	36
4.1 Ad Hoc File Transfers.....	36
4.2 Transfer Reporting .....	38

# Section 1: Network Deployment Guide

## 1.0 Introduction

VLTrader allows companies to take control of and speed up network deployments by removing all configuration and setup obstacles for trading partners that need LexiCom connect to VLTrader. To facilitate VLTrader network rollouts, VLTrader administrators can provide deployment URLs to LexiCom users.

A deployment URL points to a zip file at a web location (possibly VLTrader itself) and can contain a host file which points back to VLTrader, a local listener file which is preconfigured with LexiCom listening ports, a user certificate, CA certificates, configuration files, and any additional files pertaining to the trading relationship between VLTrader and this LexiCom.

The zip file normally would be created using a dedicated copy of *CLEO LexiCom*, using the **File>Export** feature. When registering, LexiCom users (trading partners or clients) will be prompted to enter a specified deployment URL to download the configuration. The URL can be entered during initial product registration; or later, using **File>Import** or via command-line with the `-i` option.

### 2.0 Key Features

With the VLTrader network deployment functionality you can:

Key Feature	Description	Advantage
Pre-configure and Deploy	Pre-configure and deploy LexiCom listening ports, user certificates, Self signed or Intermediate certificates, configuration files, and any additional files pertaining to the trading relationship between VLTrader and this LexiCom.	Reduce new trading partner setups.
Create Special Instructions	Create special trading partner instructions displayed before and/or after the automatic LexiCom configuration.	Customize a rollout to fit your needs.
Create Custom Splash Screen	Create a custom splash screen displayed at LexiCom run-time.	Reduce confusion by presenting a unified application.

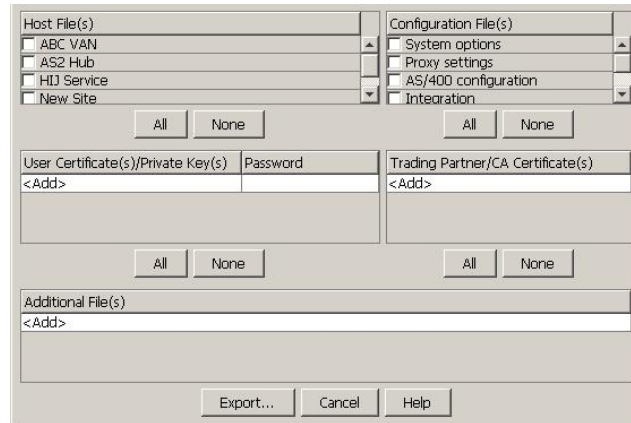
### 3.0 Configure a Network Deployment (VLTrader Administrator)

The VLTrader administrator must use a dedicated LexiCom installation to actually construct CLEO LexiCom configurations for trading partner who will be using LexiCom. If there are unique security features per LexiCom user (passwords, certificates, etc.), a trading partner specific zip file can be created with the unique configuration, or a standard configuration can be deployed that can be imported by all LexiCom users. In the former case, this requires a separate zip file and deployment URL for each LexiCom user. In the latter case, the trading partner specific configuration will have to be entered by the LexiCom user after they have imported the zip file. To provide all the information as part of the deployment, it is recommended that instructions for entering this information be provided within the **postreadme.txt** file with the specific values being provided via the e-mail (or other communication) used to provide the deployment URL to the trading partner. Alternatively, the instructions could be provided in this same e-mail.

#### 3.1 Export User Configuration Files

The network deployment process begins by the VLTrader administrator constructing a CLEO LexiCom configuration for trading partners. Once the configuration is constructed, the VLTrader administrator will export the configuration out of LexiCom as a zip file to a location accessible to trading partners via a URL. To export LexiCom user files to a zip file, select **File>Export** in the menu bar.

## Section 1: Network Deployment Guide

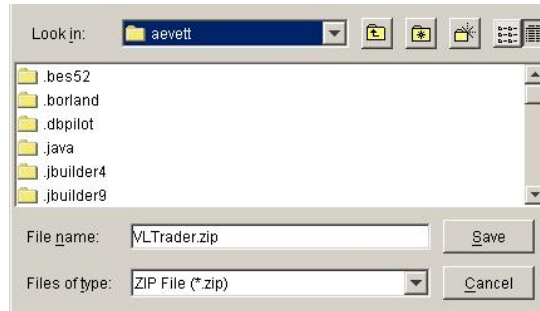


Select any combination of host files, configuration files, user certificates, and CA certificate files. A private key password must be provided with each selected user certificate - the exported user certificates and associated private keys are exported as PKCS#12 files. Any additional files may also be selected.

\*Note, a pre and/or post import message can be included. See section 3.2 before exporting.

\*Note, a custom splash screen can be included. See section 3.3 before exporting.

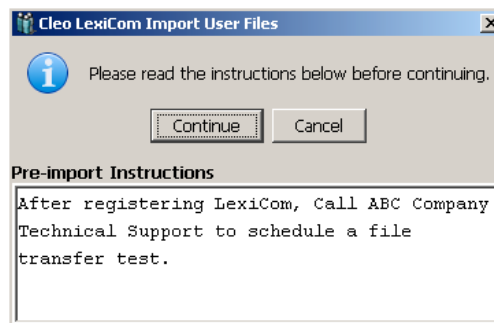
After selecting the appropriate files, click **Export**.



Select the location to save the LexiCom-exported zip file and click **Save**.

### 3.2 Create Trading Partner Instructions (optional)

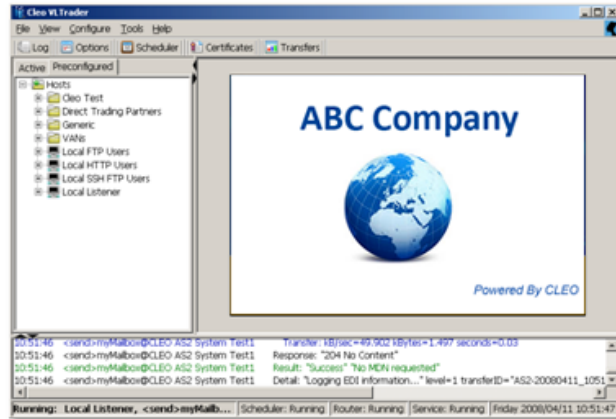
In **File>Export**, if specially named "**prereadme.txt**" and/or "**postreadme.txt**" files are included as additional files in the export, then when the exported file is imported during Registration or when using **File>Import**, the contents of these files are displayed as pre-import and post-import instructions before and after the file import. If using the command-line **-i** option rather than **File>Import**, the instructions are printed to the console. The following is an example display of a "prereadme.txt" message being utilized to provide additional steps to test connections after a deployment.



(Note: The export locations of the "prereadme.txt" and "postreadme.txt" files are not important as these files will not be copied to the file system during import. Rather, they are just for display during import.)

### 3.3 Create a Custom Splash Screen (optional)

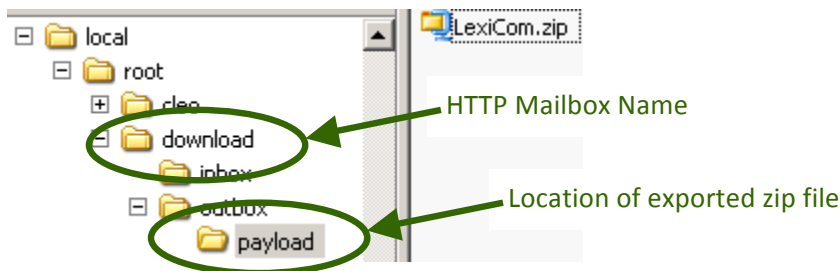
A custom splash screen can be placed in the **conf/images** directory and specified as a part of the export/import process. The filename must start with "**splash.**" and supported formats include JPEG, GIF, and PNG. The image can be no larger than 525X340 pixels and no smaller than 250X100 pixels. An example of a custom splash screen used for soft branding is shown below.



### 3.4 Make User Files Available for Download

The VLTrader administrator can make the exported zip file (user configuration files) available for download by 1) creating an HTTP server mailbox in VLTrader, 2) copying the exported zip file into the mailbox directory, and 3) providing the mailbox username and password and the associated URL to LexiCom users. (Note: Refer to the Local Listener section of the VersaLex Users Guide for see how to setup the HTTP listener. Refer to the Local HTTP Users Configuration section for setting up HTTP mailboxes.)

After the HTTP mailbox is created, copy the exported zip file into the HTTP mailbox **payload** directory as follows. In the example below, the mailbox name (username) is “download”.



The URL includes 1) the IP and Port for the HTTP (or HTTPS) listener, 2) the HTTP server path (by default, “server”) and 3) the name of the exported zip file. The following is an example.

**Definition:** `http://[server address]:[listening port]/[server path]/[zip file name]`

**Example:** <http://125.165.211.9:5080/server/LexiCom.zip>

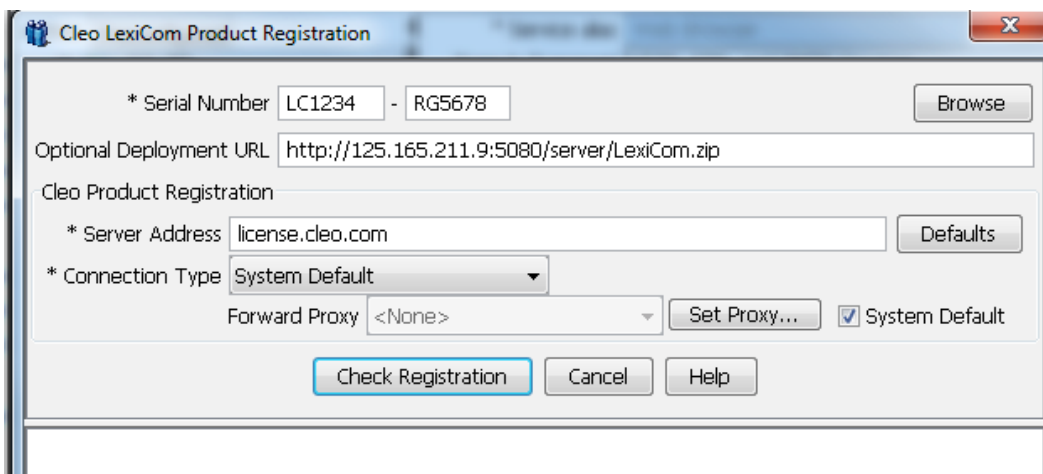
## 4.0 Configure LexiCom Using the Deployment URL (LexiCom Trading Partner)

## Section 1: Network Deployment Guide

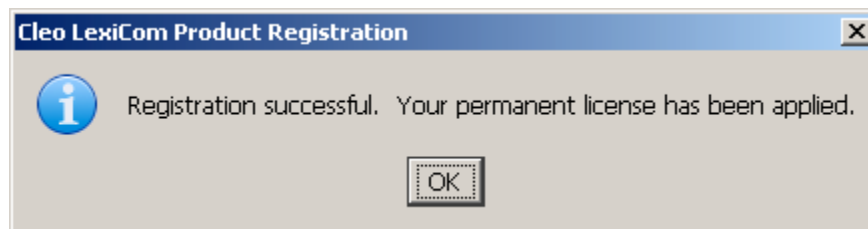
**NOTE:** We recommend that the VLTrader administrator tests the URL deployment process described below and the LexiCom connectivity back to VLTrader, before making it available to LexiCom users.

After installing LexiCom, LexiCom users complete the following steps to import user files using the deployment URL.

1. Start LexiCom (for the first time). As a part of the first-time startup process, LexiCom prompts to register LexiCom.
2. Enter the serial number and the Deployment URL. The serial number and Deployment URL should be provided by the VLTrader administrator. The following is a sample deployment URL.
3. Click **Check Registration**.



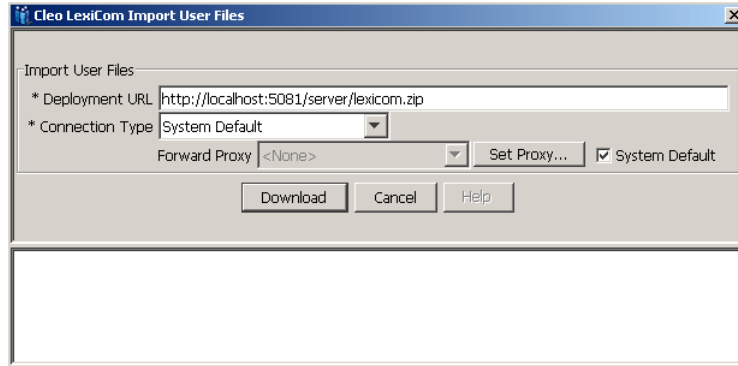
4. Click **OK**.



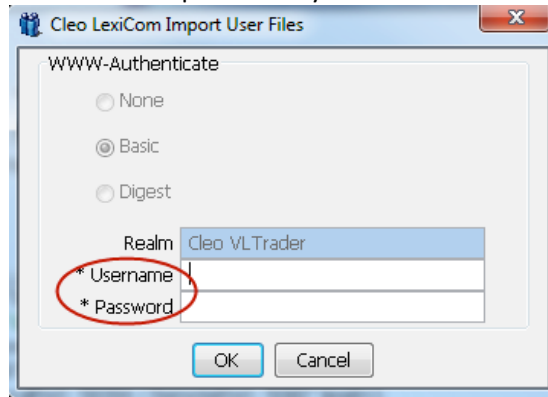
## Section 1: Network Deployment Guide

LexiCom will then prompt to download and import the LexiCom user configuration files. The deployment URL that was previously entered will be displayed.

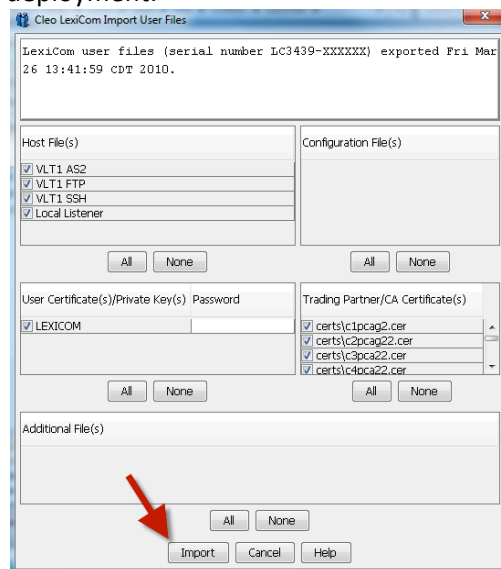
5. Click **Download**.



6. Enter the **Username** and **Password** provided by the VLTrader administrator.



7. The LexiCom Import option will be displayed with all items selected. Click **Import** to continue to complete the LexiCom deployment.



## Section 1: Network Deployment Guide

Once the import is complete, the imported items (hosts, certs, etc.) are immediately available for use.

### **A Note about User Certificates**

The **File>Export** utility includes the ability to export user certificates and private keys as PKCS#12 files in the created zip file. Likewise, the **File>Import** utility looks for PKCS#12 files in the zip file and if present, allows for import. A password must be provided for each user certificate being exported and imported. If using the command-line `-i` option rather than **File>Import**, the command-line will prompt for each PKCS#12 file password.

VersaLex-exported zip files can also be imported using the VersaLex command line `-i` option (refer to Execute from Command Line in the VersaLex User Guide).

# Section 2: Certificate Management Guide

## 1.0 Introduction

VLTrader provides certificate management capability that allows users to easily manage these and other certificate headaches.

There are many inherent difficulties managing certificates for large trading partner communities. Three of the major difficulties include:

- **Quick, Efficiently on-ramping** new trading partners with certificates. For example,
  - Creating or obtaining certificates **for** each trading partner
  - Obtaining public keys **from** each trading partner
  - Providing your public key certificate **to** each trading partner
- **Effectively updating** certificates when they expire or are revoked
- **Keeping track** of how certificates are being used within the community for each trading partner

### 2.0 Key Features

Key Feature	Description	Advantage
<b>Include Certificates as a Partner of a VLTrader Network Deployment</b>	Include user certificates and CA certificates when deploying preconfigured LexiCom client software to trading partners.	Keep all configuration files together in one package, decreasing setup time.
<b>Exchange Certificates with Trading Partners</b>	Automatically exchange certificates as a part of the enhanced AS2 protocol (Certificate Exchange Messaging): CEM works with all Cleo-to-Cleo relationships as well as all other CEM-capable products.	Save time by instantly updating certificate without interaction required from your CEM capable trading partner.
<b>Email Certificates from within VLTrader</b>	For non-CEM capable relationships, users can easily email public key certificates to trading partner from within VLTrader.	Combine exporting and emailing certificates into one easy to use step.
<b>Schedule Certificates for Future Use</b>	Select local and/or partner certificates to be activated for use at a scheduled time.	Allows overlapping certificate resulting in more efficient certificate exchange.
<b>View Certificate Usage</b>	Display user and trusted CA certificates, the certificate expiration dates, and the specific active host usages.	Easily keep track of all your trading partner certificates.
<b>Certificate Expiration Email Notification</b>	Configure VLTrader to notify you when user and CA certificates are about to expire. The warning length of time is configurable.	Never be surprised by expiring certificates.

## Section 2: Certificate Management Guide

### 3.0 Implement a Certificate Management Plan

The following are special considerations for you to consider when developing a plan to manage certificates.

- Am I deploying LexiCom to my trading community?
- What protocols am I using to connect with my trading community?
- If a segment of my trading community is not using Cleo, are these non-LexiCom trading partners CEM-compliant?
- How much warning do I need when certificates (user and CA) are about to expire?
- How will I communicate my certificate processes to my trading community?

Cleo works with, and has put together best-practices for different trading communities, based on our experience and feedback from our clients.

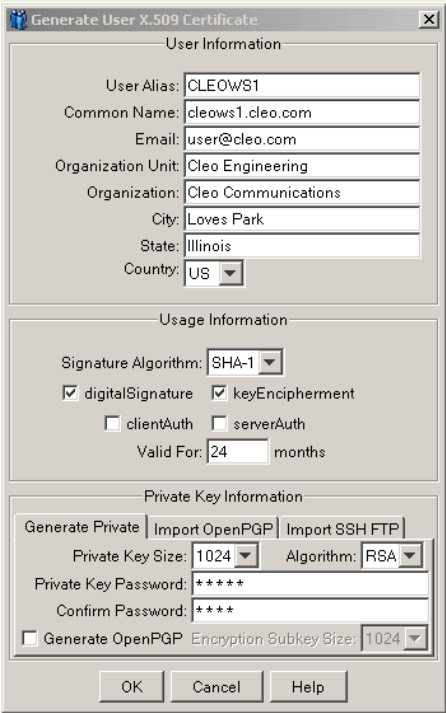
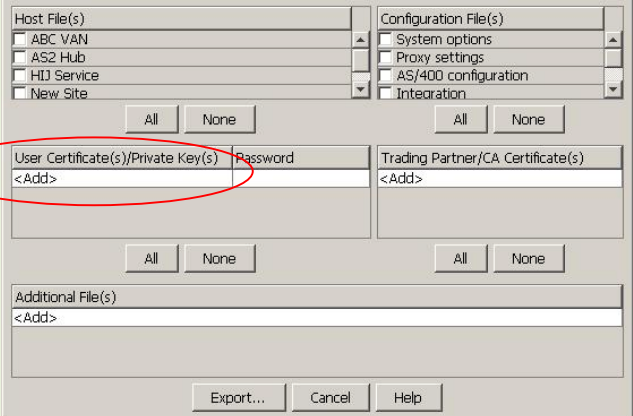
Community Type	Recommendations	Advantage
I will have a mixed community, able to deploy LexiCom clients to some trading partner and no control over other trading partners.	<p>A hybrid community is the most common and requires a hybrid approach to certificate management as follows.</p> <ol style="list-style-type: none"> <li>1. Pre-configure LexiCom for trading partners, including generating trading partner user certificates.</li> <li>2. Exchange certificates prior to deployment.</li> <li>3. Use AS2 to take advantage of Certificate Exchange Messaging (CEM).</li> <li>4. When necessary, email public key certificates to trading partners from within VLTrader.</li> </ol>	VLTrader can handle both types of certificate exchange to give you maximum flexibility
I have the ability to deploy a closed network (e.g., trading partners will use LexiCom); where my goal is to streamline processes and reduce dependence on trading partners for successfully managing my B2B communications.	<ol style="list-style-type: none"> <li>1. Preconfigure LexiCom for trading partners, including generating trading partner user certificates.</li> <li>2. Exchange certificates prior to deployment.</li> <li>3. Use AS2 to take advantage of Certificate Exchange Messaging (CEM).</li> <li>4. Configure VLTrader to notify stakeholders 15 days before certificates expire.</li> </ol>	Complete control over installation and certificate exchange.
I have no control over the client software or protocols that my trading partners will use, and very few will be using LexiCom.	<ol style="list-style-type: none"> <li>1. Email public key certificates to trading partners from within VLTrader.</li> <li>2. Configure VLTrader to notify stakeholders 15 days before certificates expire.</li> </ol>	Overlapping certificates allow for a more efficient certificate exchange.

## Section 2: Certificate Management Guide

### 3.1 Deploy Certificates to Trading Partners

**Note:** Refer to the Network Deployment guide for a complete description of how to configure LexiCom for network deployment. The following describes the process to deploy certificates.

**Note:** Refer to the Certificate Manager section of the **VLTrader User Guide** for the certificate-specific steps.

Step	Description
1) Create a trading partner user certificate	
2) Import the trading partner user certificate	

## Section 2: Certificate Management Guide

### 3) Import your public key certificate

Host File(s) Configuration File(s)

ABC VAN  System options  
 AS2 Hub  Proxy settings  
 HIJ Service  AS/400 configuration  
 New Site  Integration

All None All None

User Certificate(s)/Private Key(s) Password Trading Partner/CA Certificate(s)

<Add> <Add>

All None All None

Additional File(s)

<Add>

Export... Cancel Help

### 4) Configure VLTrader to warn stakeholders via email that certificates are about to expire.

HTTP FTP OFTP SMTP SSH FTP Responses Certificates Advanced Messages Notes

Property	Value
Archive Automatically After Maximum Receipts	500
Archive File Maximum Size (mbytes)	0,25
Async Resends	0
Async Timeout (minutes)	30
Auto Accept Received Certificate (CEM)	<input type="checkbox"/>
Connection Timeout (seconds)	150
Do Not Create Inbox Subdirectories For Multiple	<input type="checkbox"/>
Email Local And Partner Certificate Expiration...	%admin%
Email Local And Partner Certificate Expiration...	30
Email Recipient When Unable To Send Asynchronous	<input type="checkbox"/>
FTP Idle Timeout (seconds)	180
Incoming Connection Backlog Size	100
Log Received Message Details	<input type="checkbox"/>

Apply Reset Help

### 5) Create additional documents to be included as part of the deployment process .

Host File(s) Configuration File(s)

ABC VAN  System options  
 AS2 Hub  Proxy settings  
 HIJ Service  AS/400 configuration  
 New Site  Integration

All None All None

User Certificate(s)/Private Key(s) Password Trading Partner/CA Certificate(s)

<Add> <Add>

All None All None

Additional File(s)

<Add>

Export... Cancel Help

## Section 2: Certificate Management Guide

### 3.2 Certificate Exchange Messaging (CEM)

Certificates may be exchanged with your trading partners through several methods. The most popular method is via email, however an additional method for exchanging certificates securely over the internet, referred to as EDIINT Certificate Exchange Messaging, is beginning to be used as an alternative to email. EDIINT Certificate Exchange Messaging (also referred to as CEM) was developed through an initiative piloted by the Drummond Group to automate the secure exchange of public-key certificates between trading partners over the internet. Since the structure of a Certificate Exchange Message is of a specific format (currently only supported in AS2), Certificate Exchange Messages should only be sent to trading partners capable of receiving and processing CEM messages. The Cleo VersaLex products are CEM capable and will be able to successfully process properly-formed CEM messages. CEM messages should only be used to update existing certificates in an established trading partner relationship. The initial exchange of certificates for new trading partner relationships should be done out-of-band (e.g., through the Email Profile Utility).

Certificate Exchange functionality for CEM is managed by the **Certificate Exchange Dialog** which displays all active and if applicable, pending or rejected certificates for each trading partner relationship. Features of the dialog include:

Feature	
Sorting and filtering of records by protocol and current status	X
Additional filtering of records by certificate selection	X
Simultaneous selection of multiple records that are currently filtered by the same protocol and status	X
Command options available for any/all selected records based on the current filter settings	X
The ability to send new certificates to your trading partner through EDIINT Certificate Exchange Messaging (CEM) - if your trading partner is CEM-capable; or through email if your trading partner is not CEM-capable or if you are setting up the initial trading partner relationship and have never previously exchanged certificates with a trading partner	X
Certificates for individually selected records may be viewed by either right-clicking on that record and choosing the 'Display' option or by double-clicking on a specific record. (Viewing of certificates for multiply selected records is not supported.)	X

**Note:** Refer to the Certificate Manager of the **VLTrader User Guide** for a complete description of how to leverage Certificate Exchange Messaging from with VLTrader.

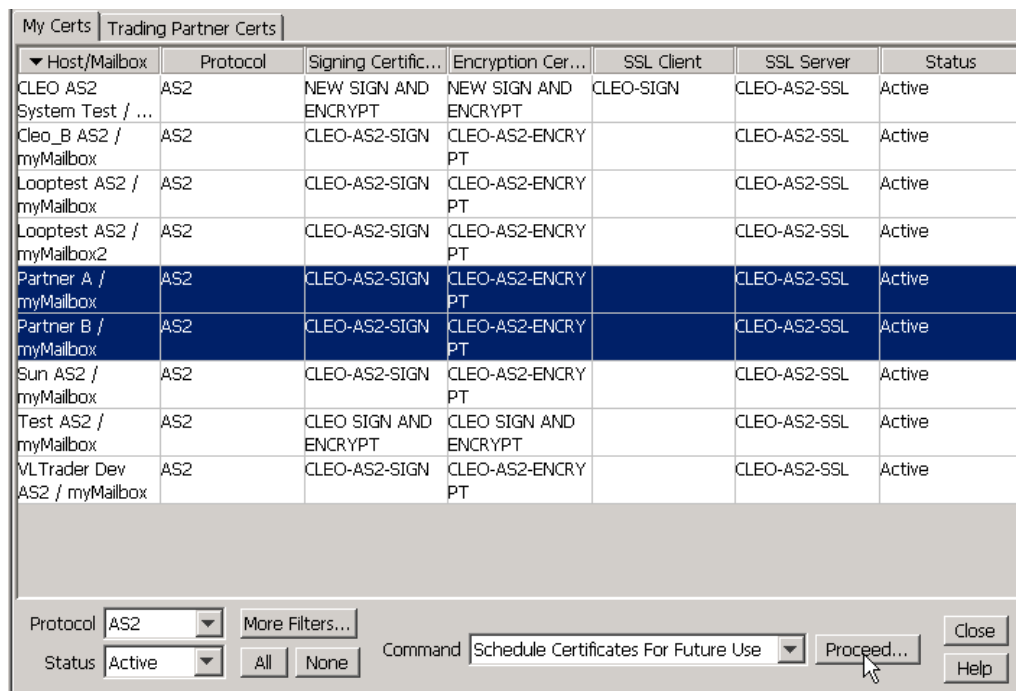
## Section 2: Certificate Management Guide

### 3.3 Schedule Certificates for Future Use

VLTrader provides the ability to select local and/or partner certificates on a per trading partner basis. Certificates can be activated for use at a scheduled time in the future or immediately. Additionally, trading partners using AS2 protocols will automatically be able to take advantage of the "first-usage" features for scheduled local encryption certificates and scheduled partner signing certificates.

**Note:** Since EDIINT Certificate Exchange Messaging already provides a mechanism for sending, receiving, installation and "first-usage" of certificates, scheduling of certificates for future use is only available for non AS2-CEM protocols.

To schedule new certificates for future use for one or more trading partners:



1. Select the desired non-AS2-CEM trading partner(s) on the **My Certs** or the **Trading Partner Certs** panel
2. Select the '**Schedule Certificates For Future Use**' command option
3. Click the **Proceed** button

The following dialog will appear allowing for the selection and scheduling of new applicable certificates for this trading relationship:

## Section 2: Certificate Management Guide

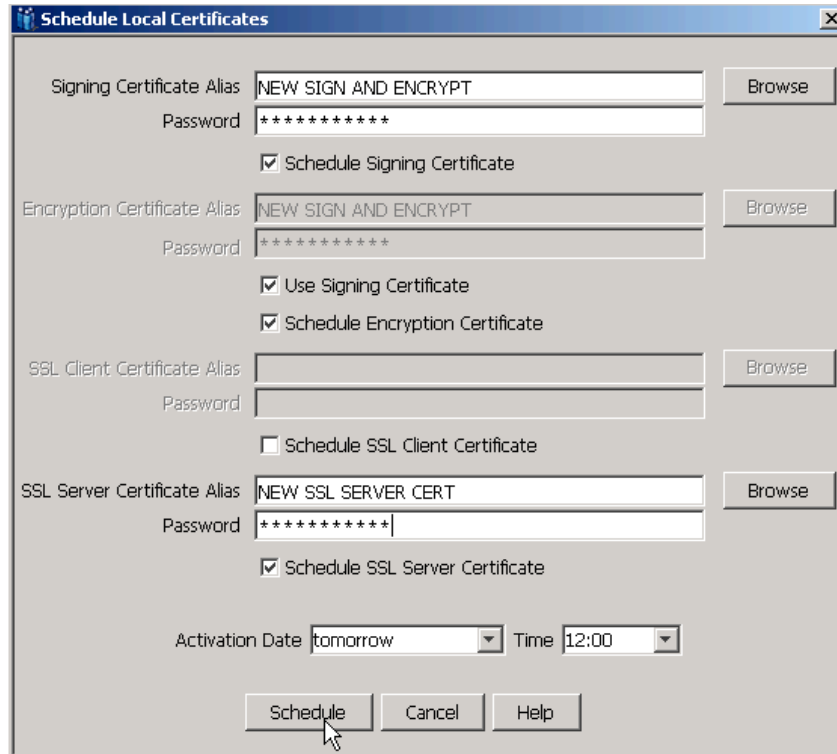
The screenshot shows the 'Schedule Local Certificates' dialog box. It is divided into four main sections for certificate selection:

- Signing Certificate:** Alias field contains 'NEW SIGN AND ENCRYPT', Password field contains '\*\*\*\*\*', and the 'Schedule Signing Certificate' checkbox is checked.
- Encryption Certificate:** Alias field contains 'NEW SIGN AND ENCRYPT', Password field contains '\*\*\*\*\*', the 'Use Signing Certificate' checkbox is checked, and the 'Schedule Encryption Certificate' checkbox is checked.
- SSL Client Certificate:** Alias and Password fields are empty, and the 'Schedule SSL Client Certificate' checkbox is unchecked.
- SSL Server Certificate:** Alias field contains 'NEW SSL SERVER CERT', Password field contains '\*\*\*\*\*', and the 'Schedule SSL Server Certificate' checkbox is checked.

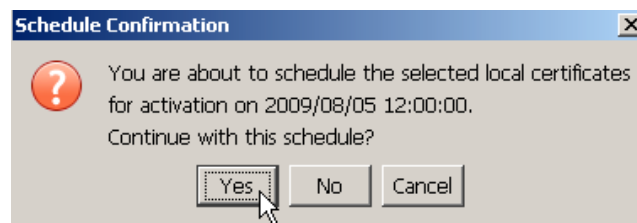
At the bottom of the dialog, there are two dropdown menus: 'Activation Date' set to 'today' and 'Time' set to 'now'. Below these are three buttons: 'Schedule', 'Cancel', and 'Help'.

1. Select the new certificate(s) by clicking the **Browse** button or by typing the alias of the new certificate(s) directly in the specified Alias fields.
2. Input the private key password to the Password field.
3. Select **the Use Signing Certificate option** to choose the same certificate for Signing and Encryption or deselect this option to use different certificates for Signing and Encryption.
4. The SSL Client Certificate Alias and Password fields will only be enabled if an SSL Client certificate had been previously selected for the trading relationship. To override selection of these fields, the Schedule SSL Client Certificate checkbox may be selected or deselected as desired.
5. The SSL Server Certificate Alias and Password fields will only be enabled if the associated HTTP/s or FTP/s port has been enabled in the Local Listener. To override selection of these fields, the Schedule SSL Server Certificate checkbox may be selected or deselected as desired.
6. Select the desired Activation Date and Time from pull-down lists or specify your own date (in the form: 'yyyy/mm/dd') and time (in the form: hh:mm or hh:mm:ss).
7. Once all the desired new certificates for the trading relationship have been selected and desired activation date and time has been chosen, click the **Schedule** button to schedule the selected certificates for future use.

## Section 2: Certificate Management Guide

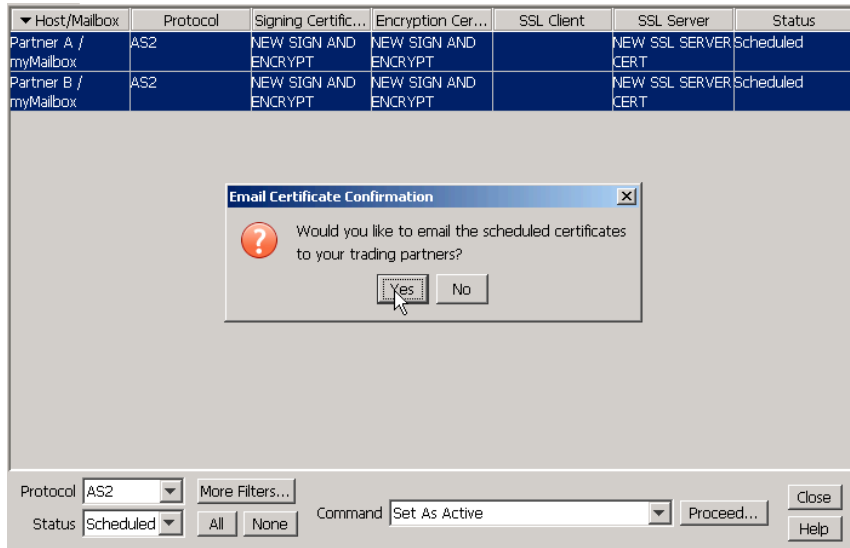


- The following confirmation dialog will be displayed allowing for final verification of the certificates before the certificates are scheduled for activation.

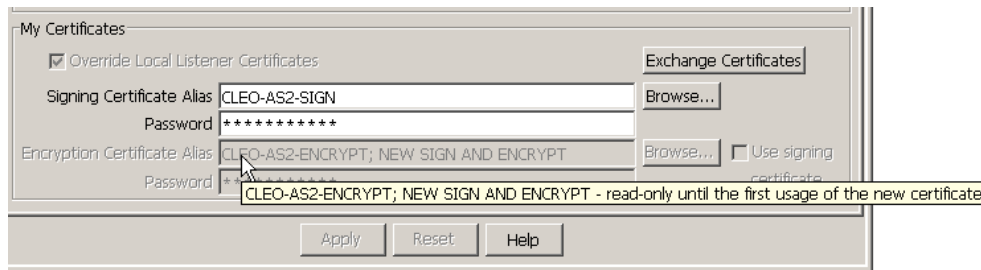


- If you click [Yes], all selected certificates will be scheduled for installation and activation for the specified trading partner(s). Clicking the [No] button brings you back to the previous 'Schedule Local Certificates' panel allowing you the option of choosing either new certificates and/or a new activation date/time.
- The status of the selected record(s) will be set to Scheduled and the option to email the scheduled certificates to your trading partner(s) will be given.

## Section 2: Certificate Management Guide



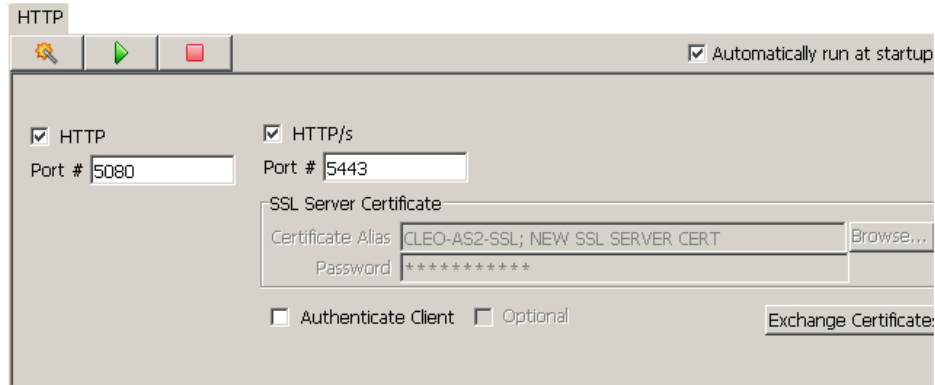
10. The new certificates will be displayed in the panel with the current certificates and will not be editable until after the scheduled certificate activation date and time has elapsed or your trading partner begins encrypting with the new encryption certificate.



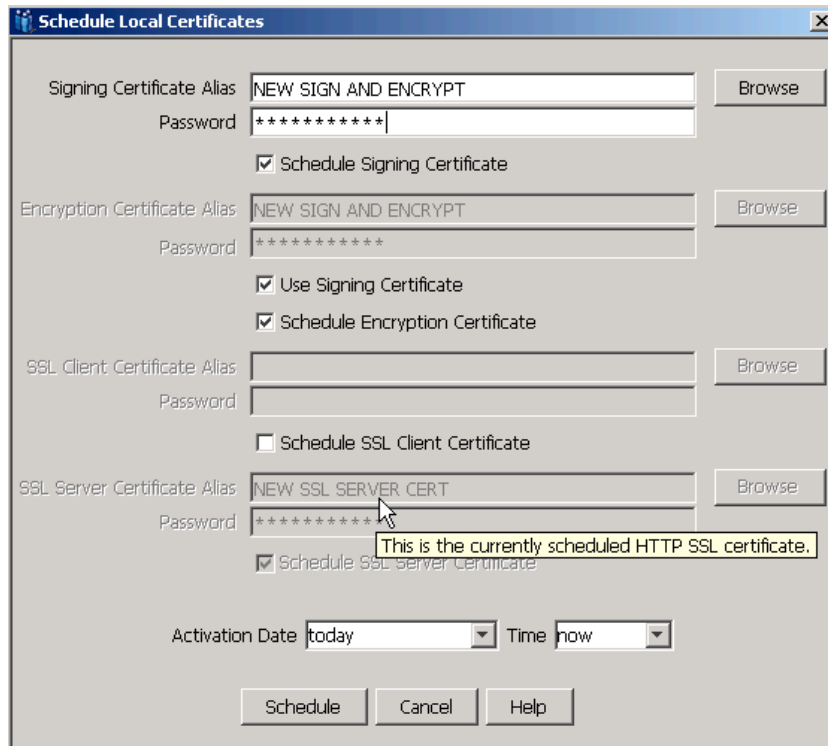
At that time, all previously scheduled certificates will be activated and an email notification will be sent to the email address specified in the Admin Email Address field on the Other tab in Configure System Options panel.

11. If a new SSL Server certificate was scheduled, the new certificate will be displayed in either the Local Listener's HTTP or FTP panel (depending on the protocol) with the current certificate. The Certificate Alias field will be read-only until all partners using the same SSL protocol have scheduled the new certificate and that scheduled date has elapsed. Once this has occurred, the new SSL Server certificate will automatically be installed (normally within five-minutes).

## Section 2: Certificate Management Guide



12. Since only one HTTP or FTP SSL Server certificate may be active at any time, the new SSL Server certificate will be the only certificate that may be scheduled for all subsequent schedule requests.



## Section 2: Certificate Management Guide

### 3.4 View Certificate Usage

Certificate usage can be displayed to provide a single, easy to use interface for all you active certificates. View User and CA certificate usage as follows.

1. Select View>Usage... in the menu bar.

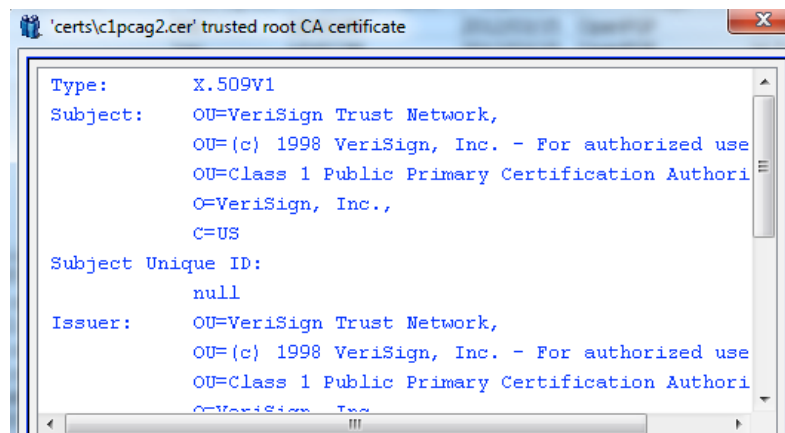
▼ User Certificate	Self-signed	Common Name	Expiration	Usage	HostMailbox
202_CLEO	Yes	Cleo_2.02	2003/09/06	Not used	
CLEO	Yes	Cleo	2005/09/11	SSL server	Local AS2 Listener
CLEO	Yes	Cleo	2005/09/11	Signing/encryption	Local AS2 Listener
IBMSA1	No	1013682657-5	2004/02/14	SSL client	IBM IE FTPs\myMai...

▼ Trusted CA Certificate	Root	Common Name	Expiration	Usage	HostMailbox
certs\c1pcag2.cer	Yes	Class 1 Public Pri...	2018/05/18	Implicitly trusted	
certs\c2pcag22.cer	Yes	Class 2 Public Pri...	2028/08/01	Implicitly trusted	
certs\c3pca22.cer	Yes	Class 3 Public Pri...	2028/08/01	Implicitly trusted	
certs\c4pca22.cer	Yes	Class 4 Public Pri...	2028/08/01	Implicitly trusted	
certs\cleo-test.cer	Yes	LEXSVR01.DFICO...	2010/10/18	Implicitly trusted	
certs\cleo.cer	Yes	Cleo	2005/09/11	Encryption	Looptestmymailbox
certs\dod_class_3_ca-3.cer	Yes	DoD CLASS 3 Roo...	2020/05/14	Implicitly trusted	
certs\dod_class_3_ca-3.cer (2)	No	DOD CLASS 3 CA-3	2006/07/04	Implicitly trusted	
certs\edicommissaries.deca.mil...	No	edicommissaries...	2005/03/26	Implicitly trusted	
certs\elitfn.cer	Yes	FlitClient eds.com	2011/06/19	Implicitly trusted	

Save As... Close

2. Each user and trusted CA certificate is listed by either alias (user certificate) or filename (CA certificate). Supplemental information includes the certificate expiration date and specific active host usage. A certificate is repeated in the list if it has multiple uses. Double-click a certificate to display a detailed description.



3. The **Save As** options can be used to save the report as a HTML file for offline viewing or distribution.

### 4.0 The Certificate Manager

VLTrader's Certificate Manager provides robust management of digital certificates and private keys. The following is a list of features that it supports. Refer to the Certificate Manager section of the **VLTrader User Guide** for detailed instructions on how to use each of these features.

Feature	
Generate PEM-formatted Certificate Signing Requests	X
Generate Trusted CA Certificates from OpenPGP or SSH FTP Keys	X
Import User Certificates, CA Certificates and Private Keys	X
Export Certificates and Private Keys	X
Export OpenPGP or SSH FTP Keys	X
Replace Trusted CA Certificates	X
Move Pending Certificates to Trusted CA Certificates (and Vice Versa)	X
Remove Certificates	X
View Certificate Usage	X
Exchange Certificates with Trading Partners	X
Schedule Certificates for Future Use	X

### 5.0 Cryptographic Services

#### 5.1 Cryptographic Services

The Cleo products support three different cryptosystems: S/MIME, XML, and OpenPGP. S/MIME is supported through AS2 and AS3 (see AS2 mailbox AS2 tab as an example). XML is supported through ebXML (see ebXML mailbox ebXML tab) and mailbox-level encryption (see Configure the Mailbox Encryption Tab). OpenPGP is supported through FTP and SSH FTP (see Configure the Mailbox OpenPGP Tab).

For complete details on these types of cryptosystems, and their uses in signing and encryption, refer to the VersaLex user's guide under Cryptographic Services Overview.

# Section 3: Deploy Custom Community Web Portals

## 1.0 Introduction

Successful partner enablement goes beyond the initial contact. VLTrader provides an easy-to-use and customizable web-portal to allow low-tech or low-volume users with a manual transfer option; or, alternatively, to provide a back-up method for client-enabled, automated partners. With only an Internet connection and a web browser, the web portal user can easily upload and download files to and from the VLTrader server, view file transfer history, and access any custom web pages that have been configured by the VLTrader administrator.

Web Portals can be customized for look and feel as well as for the actual portal content. The special value of the web portal functionality is 1) it is extremely easy to configure and implement, and 2) it allows companies to pursue a comprehensive B2B communications strategy including automated and ad hoc options for trading partners, yet consolidated into a single solution. The Web Portal is intended to be a complement and alternative to the core automated B2B file transfer processes.

## Section 3: Deploy Custom Community Web Portals

### 2.0 Key Features

The web portal allows:

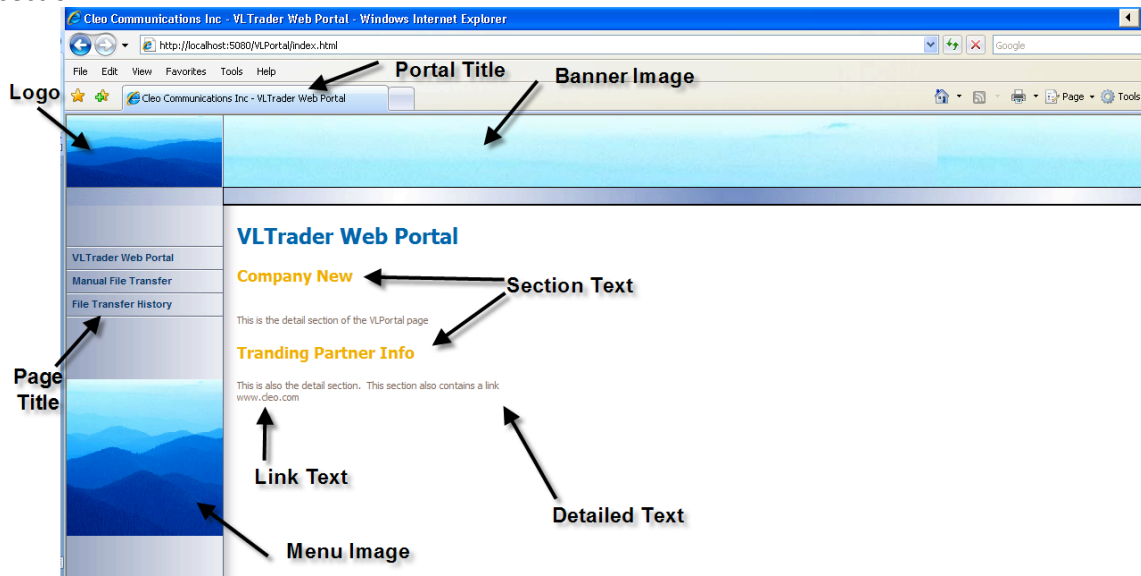
Key Feature	Description	Advantage
<b>Image Customization</b>	VLTrader administrators can customize the logo, banner, and navigation bar images.	Customers can easily recognize your web portal.
<b>Content Customization</b>	VLTrader administrators can create web pages with custom content, link to external pages, provide access to related documentation, etc.	Easily link customers back to your website, or include important information.
<b>Embedding “Base” Pages into External Pages</b>	VLTrader administrators can embed base pages (upload/download and file transfer history) into other, external pages or portals.	Allow access to the web portal directly from your website.
<b>Upload and Download Files</b>	Web portal users can manually upload and download files.	Easy and cost effective solution for your customers.
<b>View File Transfer History</b>	Web portal users can view their file transfer history for both ad hoc file transfers and automated transfers.	Easy data tracking for your customers.

### 3.0 Configure a Web Portal (VLTrader Admin)

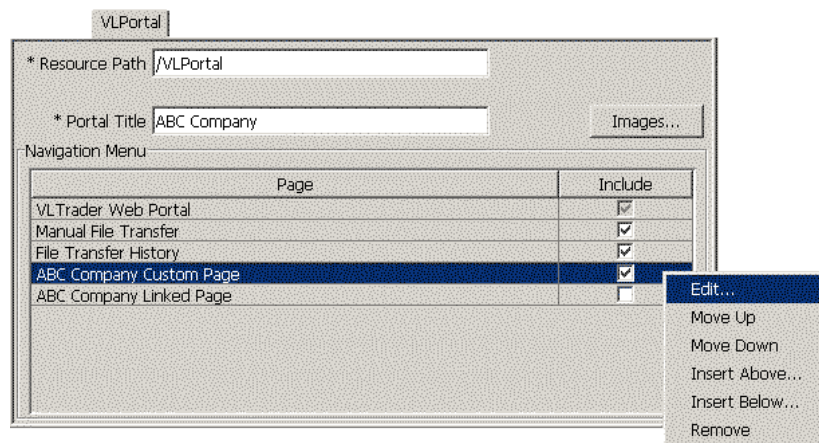
The web portal feature allows your trading partners to perform ad hoc payload transfers and to view transfer reports, all through some simple web pages. This can be utilized as a secondary means to an automated file transfer, or as an option for low volume users. The Web Portal pages can be customized to add additional company specific information or pages.

#### 3.1 Customize the Portal Interface

Refer to the following image to clarify web portal page customization and configuration, discussed in this section.



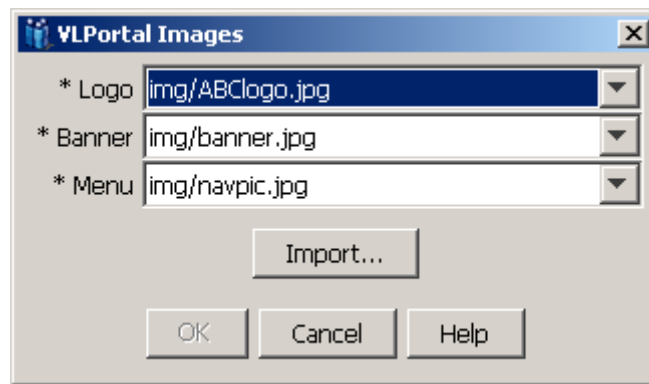
On the **VLPortal** tab (on the **Web Browser** node of the **Local Listener**):



## Section 3: Deploy Custom Community Web Portals

1. The VLPortal Resource Path defaults to the component name ("/VLPortal"). Your trading partners must include this resource path in the URL when accessing VersaLex through a web browser. It can be changed at any time, but must start with a forward slash (/) character. For example, <http://216.239.51.99:5080/VLPortal>.
2. The Portal Title is defaulted to the company name in the VLTrader registration and can be edited at the VLPortal configuration screen.. The Portal Title is displayed on the web browser title bar for each portal page.
3. Use **Images...** to customize the graphic images within the framework of the web portal.

In the **VLPortal Images** dialog:



- The Logo defaults to "img/defaultlogo.jpg". This image is displayed in the upper left-hand corner of each web portal page. It can be changed to any customized image (e.g., your company logo).
  - The Banner defaults to "img/banner.jpg". This image is displayed along the top of each web portal page. It can be changed to any customized image (e.g., your company banner). A banner size of approximately 2000w X 84h pixels is recommended.
  - The Menu defaults to "img/navpic.jpg". This image is displayed in the navigation bar, along the left border of each web portal page. It can be changed to any customized image.
  - Use [Import...] to import new graphic images that can subsequently be selected through the Logo, Banner, and Menu fields. All imported files are stored in 'webserver\VLPortal\img\' under the VLTrader home directory.
4. Configure the Navigation Menu table to customize the web portal interface to your trading partners. Each row in the table represents one web page. Use the right-click menu options to manipulate each row. Only one row may be selected at a time.

## Section 3: Deploy Custom Community Web Portals

The default configuration provides three pages:

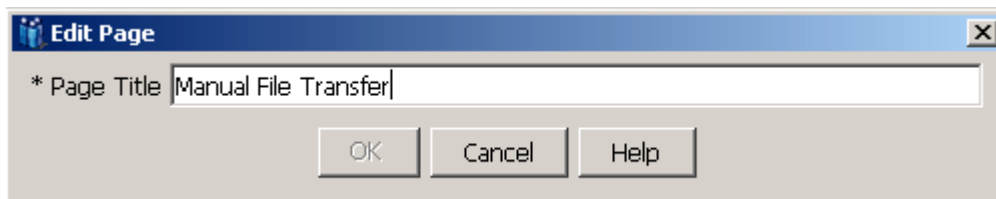
- VLPortal default home page (VLTrader Web Portal)
- Ad hoc file transfer page (Manual File Transfer)
- Transfer reporting page (File Transfer History)

Use right-click menus on each table entry to determine which options are available for each page. The following rules apply.

- VLTrader Web Portal: is included by default; may not be excluded; title and contents may be modified; may not be removed; must be first within the navigation menu; may not be moved within the navigation menu.
- Manual File Transfer and File Transfer History: is included by default; may be excluded; only the title may be modified; contents may not be modified; may not be removed; may be moved within navigation menu.
- Any other newly-created page: is included by default; may be excluded; title and contents may be modified; may be removed; may be moved within the navigation menu.

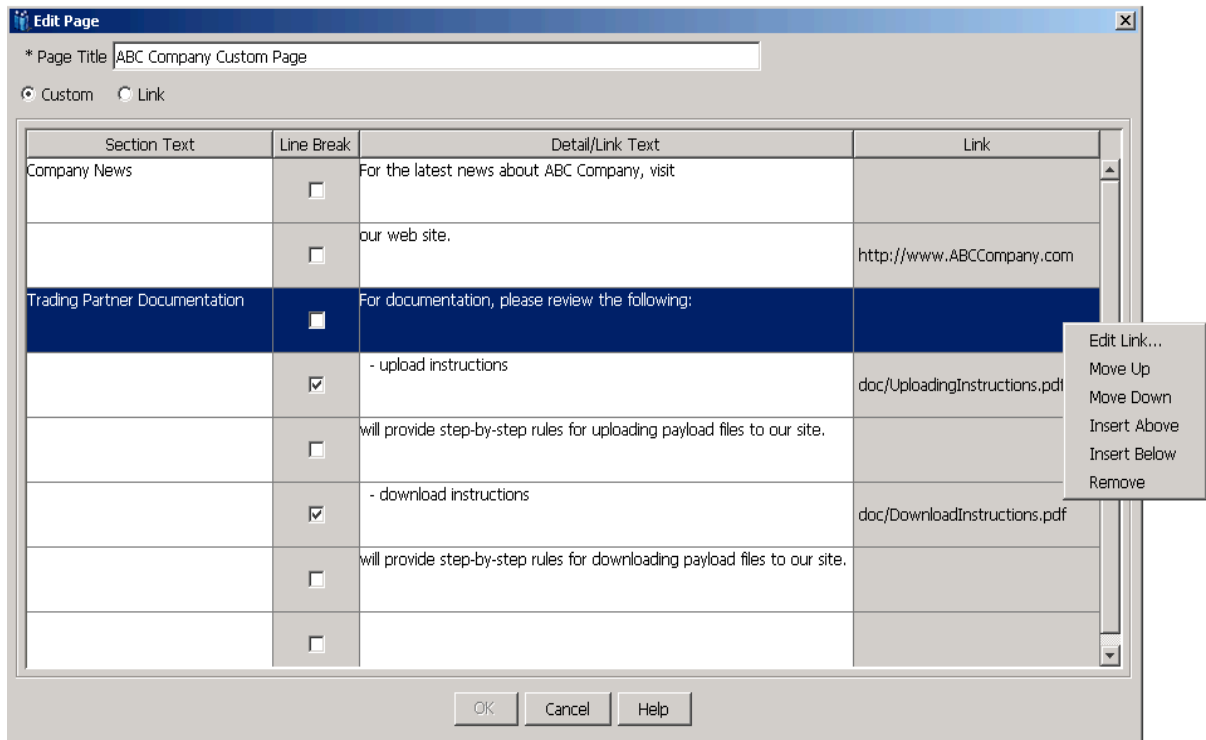
### 3.2 Add/Edit Pages (via editor)

To edit a page, select "Edit..." from the desired row's right-click menu. If the row corresponds to Manual File Transfer or File Transfer History, the following is displayed. Recall that only page title may be changed for these two web pages.



If any other web page is chosen, the following is displayed. In the Edit dialog, select Custom to modify your custom-built web page. These are pages that you have created within VLTrader. Select Link to insert a link directly to any web pages that have been built outside of the VLTrader. The following is displayed for the Custom option.

## Section 3: Deploy Custom Community Web Portals

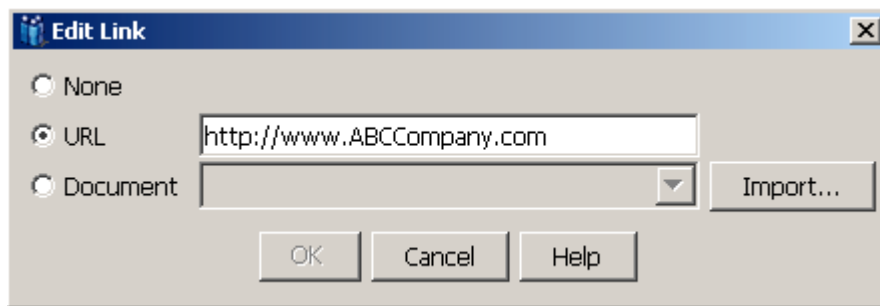


Each row in the table represents specific content for the web page. Use the right-click menu options to manipulate each row. A range of rows may be selected, only within the VLTrader native GUI. When manipulating a range of rows, the SHIFT key must be held down while selecting the right-click menu option. Note that the last row of the table will always be empty.

1. **Section Text** is represented as heading text on the web page (HTML <H2> tag).
2. **Line Break**, if checked, is represented as a blank line on the web page (HTML <BR> tag).
3. The **Detail/Link Text** is represented in one of two ways on the web page:
  - If the **Link** field is empty, then **Detail/Link Text** is represented as detailed text.
  - If the **Link** field contains a hyperlink, then **Detail/Link Text** is represented as an underlined link reference.
4. The **Link** field represents the actual hyperlink. To insert or edit a link, select "Edit Link..." from the desired row's right-click menu. The following will be displayed.

## Section 3: Deploy Custom Community Web Portals

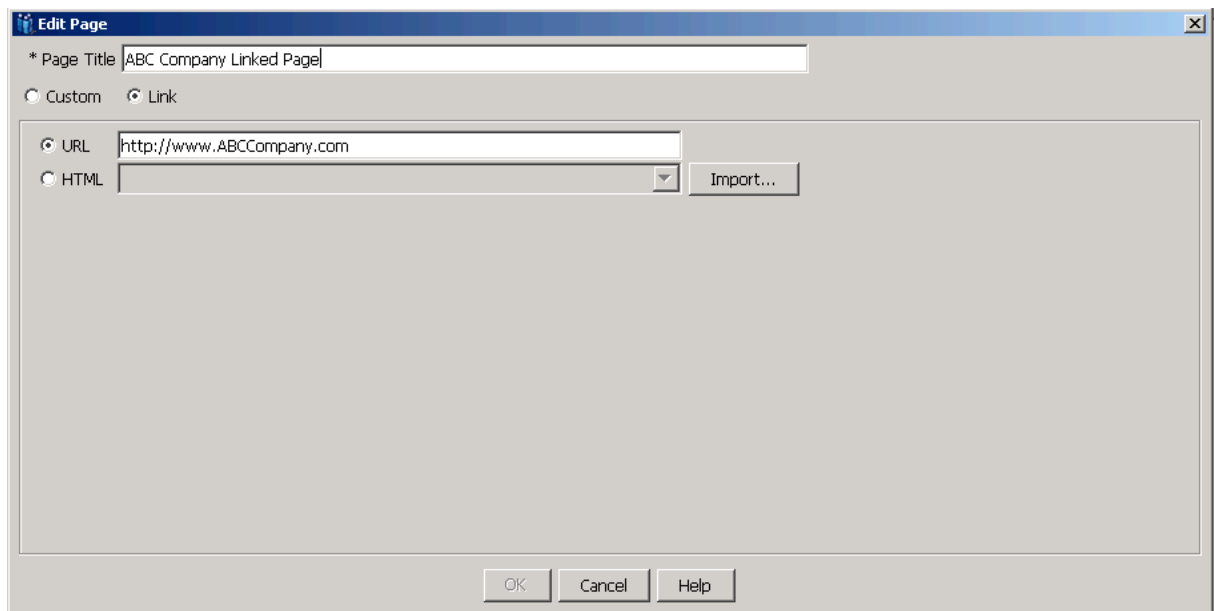
In the **Edit Link** dialog:



- Select **None** to clear the link.
- Select **URL** to enter a valid URL (e.g., a link to your company's web site).
- Select **Document** to select a document (e.g., a PDF of documentation pertinent to your trading partner).
- Use [Import...] to import new documents that can subsequently be selected through the **Document** field. All imported files are stored in 'webserver\VLPortal\doc\' under the VLTrader home directory.

### 3.3 Add/Edit Pages (via URL)

In the **Edit** dialog, the following is displayed for the **Link** option.



## Section 3: Deploy Custom Community Web Portals

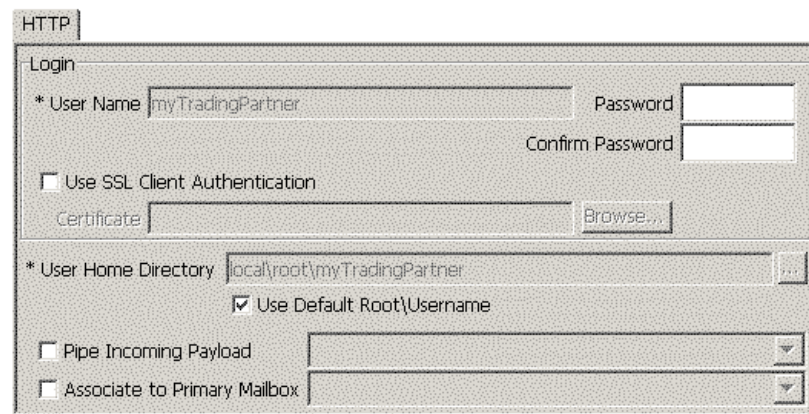
- Select **URL** to enter a valid URL (e.g., a link to your company's web site).
- Select **HTML** to select any valid HTML page.
- Use [Import...] to import new **HTML** files that can subsequently be selected through the HTML field. All imported files are stored in 'webserver\VLPortal\html\' under the VLTrader home directory.

Please note the following with regard to **Link** pages.

1. If the HTML option is used, any images that are referenced within the HTML file should be placed in 'webserver\VLPortal\img\' under the VLTrader home directory. This can be accomplished through the [Import...] button under the **VLPortal Images** dialog discussed above.
2. It is the user's responsibility to ensure that any content and style sheets are compatible with the web portal framework.

### 3.4 Configure a Trading Partner

After activating the HTTP Local Users host from the preconfigured tab, you can configure the root and individual partner mailboxes.



The screenshot shows a dialog box titled "HTTP" with a "Login" section. It contains the following fields and options:


- \* User Name: myTradingPartner
- Password: [Empty field]
- Confirm Password: [Empty field]
- Use SSL Client Authentication
- Certificate: [Empty field] with a "Browse..." button
- \* User Home Directory: local\root\myTradingPartner
- Use Default Root\Username
- Pipe Incoming Payload
- Associate to Primary Mailbox

1. The HTTP **User Name** is simply the mailbox alias. Enter a unique alias to be used by your trading partner to log into your HTTP server.
2. The User **Home Directory** defaults to a username subdirectory under the default root directory. To override this path for this user only, uncheck Use Default Root\Username and either enter the path or use the [...] button to select a new home directory.

### Section 3: Deploy Custom Community Web Portals

3. The **Pipe Incoming Payload** allows for this trading partner to send to your HTTP server and redirect, or pipe, the incoming payload out through a different protocol. Should the transfer out to the pipe mailbox fail, then the transfer into the local mailbox will also fail.
4. The **Associate to Primary Mailbox** indicates an alternate host\mailbox location for payload transfers with this trading partner. Please note that, even if the primary mailbox is specified, all transfers are still classified under the local HTTP user host\mailbox (and not the primary host\mailbox).
5. The HTTP server supports either password-based WWW authentication or public key-based SSL client authentication.

Note: If using VLProxy to reverse proxy into VLTrader, VLProxy only supports WWW authentication for identifying HTTP clients and does not support SSL client authentication.

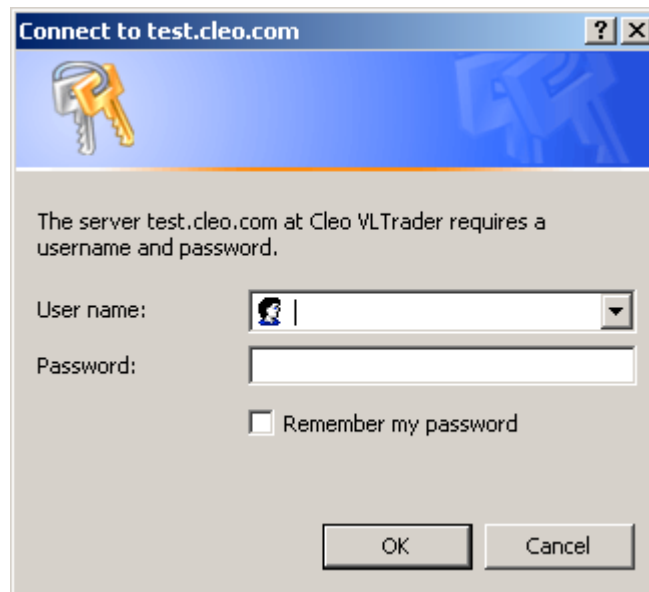
- a. WWW Authentication using a Password: Enter the user's Password and confirm that you entered it correctly by retyping it in the Confirm Password. Passwords are encoded on the screen and in the user configuration file.
- b. SSL Client Authentication using a CA Certificate: Specify the name of the file containing the Client's Authentication Certificate (the remote client certificate to be used for authentication) by clicking the [Browse...] button. Find the certificate that matches the one you received from your trading partner and click .

Note: **Authenticate Client** in the Local Host: HTTP Tab must be enabled.

## Section 3: Deploy Custom Community Web Portals

### 3.5 Provide Access to the Web Portal

Before your trading partners can access the web portal, you must first establish a mailbox for each partner under the local HTTP users (refer to Mailbox HTTP Tab), and, next, provide the partners with the proper URL (e.g., `http(s)://VLTraderComputerIP:http(s)Port/VLPortalResourcePath`). Once these steps are followed, your trading partners should access the web portal by entering the specified URL into their browser. They will be prompted for a login.



The **User name** and **Password** are those that were established within the trading partner's mailbox under the local HTTP user. After logging in, the partner will be presented with the VLPortal home page. The navigation within the web portal is determined by the setup you established under the **VLPortal** tab. For a description of the VLPortal base pages, as the web-portal user would see them, refer to VLPortal Base Web Pages.

## Section 3: Deploy Custom Community Web Portals

### 3.6 Embed Base Pages into “External” Pages (outside the web portal)

It is possible to link directly to a web portal base page (refer to VLPortal Base Pages) from your own web pages. In order to access a base page in this manner, it is first necessary to log in, as discussed in Providing Access to the Web Portal. The URL you provide will contain parameters to direct the display of the desired page(s). Refer to the table below.

URL	Link Results (after login)
<code>http(s)://VLTraderComputerIP:http(s)Port/ VLPortalResourcePath?reportName= FileTransferHistory &amp;external=true</code>	The Transfer Reporting page provided.
<code>http(s)://VLTraderComputerIP:http(s)Port/ VLPortalResourcePath?reportName= ManualFileTransfer &amp;external=true</code>	The Ad Hoc File Transfers page is provided.
<code>http(s)://VLTraderComputerIP:http(s)Port/ VLPortalResourcePath?reportName= FileTransferHistory,ManualFileTransfer &amp;external=true</code>	The Transfer Reporting and Ad Hoc File Transfers pages are provided, in the order specified, through a tabbed pane within a single page.

**Please note that you should not provide multiple links to the base pages within the same web browser session.** If you wish to display multiple base pages, you should request all pages within one URL, using a comma-separated list as shown in the table above.

## Section 3: Deploy Custom Community Web Portals

### 4.0 Using the Web Portal (Trading Partner)

The Web Portal user can perform ad hoc file transfer and view their file transfer history as follows.

#### 4.1 Ad Hoc File Transfers

This web page shown below is used to perform ad hoc file transfers to/from the VLTrader HTTP server. Note that the name of this page (in example below, "Manual File Transfer") is configurable by the VLTrader administrator, so the title may change. However, the content of the page will remain the same.

**Note regarding general web page usage:** The standard browser forward and back buttons should not be used when navigating within, and between, the VLPortal base pages. Instead use the left-menu pane to navigate between the pages. Also, the standard browser refresh button should not be used. Instead use the [Refresh] buttons provided on the web pages.

**Manual File Transfer**

File Upload  
Server Upload Directory: .inbox

File Download  
Server Download Directory: .outbox\payload

Filename	Size (KB)	Modified (CDT)
File1.edi	0.647	2009/03/16 23:34:51
File2.edi	0.647	2009/03/16 23:34:51
File3.edi	0.647	2009/03/16 23:34:51
File4.edi	0.647	2009/03/16 23:34:51

Zip single-selection file download

## Section 3: Deploy Custom Community Web Portals

1. The Server Upload Directory designates the VLTrader directory to which files can be uploaded. If multiple directory locations have been set up by the VLTrader administrator, a new directory may be chosen from the drop-down list. Select ".." to move up a directory; select ".\current directory\subdirectory" to move down a directory.
2. Press [Upload...] to select a local file that you wish to upload.
3. The Server Download Directory designates the VLTrader directory from which files can be downloaded. If multiple directory locations have been set up by the VLTrader administrator, a new directory may be chosen from the drop-down list. Select ".." to move up a directory; select ".\current directory\subdirectory" to move down a directory.
4. The table shown below the Server Download Directory contains a listing of the files within that directory. By clicking on the column headers, the table can be sorted in ascending or descending order, based on the selected column's content. Within the table, multiple files may be selected, through the use of the SHIFT and CTRL keys. Use the right-click menu options to "Download..." or "Delete..." files from the server.
5. Press [All] to select all the rows in the table.
6. Press [None] to deselect all the rows in the table.
7. Press [Refresh] to update the table display in the case where the directory's contents may have changed.
8. Press [Help] to obtain an HTML display of this documentation. The information will be displayed in a separate browser tab.
9. Zip single-selection file download, if selected, will download any individual file within a compressed/zip archive. When multiple files are selected for download, a compressed/zip archive is automatically created, irrespective of this checkbox setting.

## Section 3: Deploy Custom Community Web Portals

### 4.2 Transfer Reporting

VLTrader transfer logging, if enabled, logs information (e.g., file size, transfer time, status, etc.) regarding the upload and download of files. When processing multiple files in a batch, it logs each file individually.

This page is used to review the status of all file transfers associated with your HTTP user mailbox and, optionally, if configured by your VLTrader administrator, your primary mailbox. Note that the name of this page (in example below, "File Transfer History") is configurable by the VLTrader administrator, so the title may change. However, the content of the page will remain the same. Also note that, if transfer logging is not enabled within VLTrader, you will receive a message stating this, rather than viewing this screen.

**Note regarding general web page usage:** The standard browser forward and back buttons should not be used when navigating within, and between, the VLPortal base pages. Instead use the left-menu pane to navigate between the pages. Also, the standard browser refresh button should not be used. Instead use the [Refresh] buttons provided on the web pages.

### File Transfer History

Cleo VLPortal Transfer Report From 2009/05/15 00:00:00 To 2009/05/15 14:10:35

Start Time (CDT)	Host	Mailbox	Direction	Status	Filename
2009/05/15 14:09:52	Local HTTP Users	TradingPartnerOne	send	Success	File1.edi
2009/05/15 14:09:52	Local HTTP Users	TradingPartnerOne	send	Success	File2.edi
2009/05/15 14:09:52	Local HTTP Users	TradingPartnerOne	send	Success	File3.edi
2009/05/15 14:09:52	Local HTTP Users	TradingPartnerOne	send	Success	File4.edi
	<a href="#">View Information...</a>				
2009/05/15 14:10:21	Local HTTP Users	TradingPartnerOne	receive	Exception	TESTREALLYHUGE1.edi

Page 1 of 1

Active Filters: Transfers

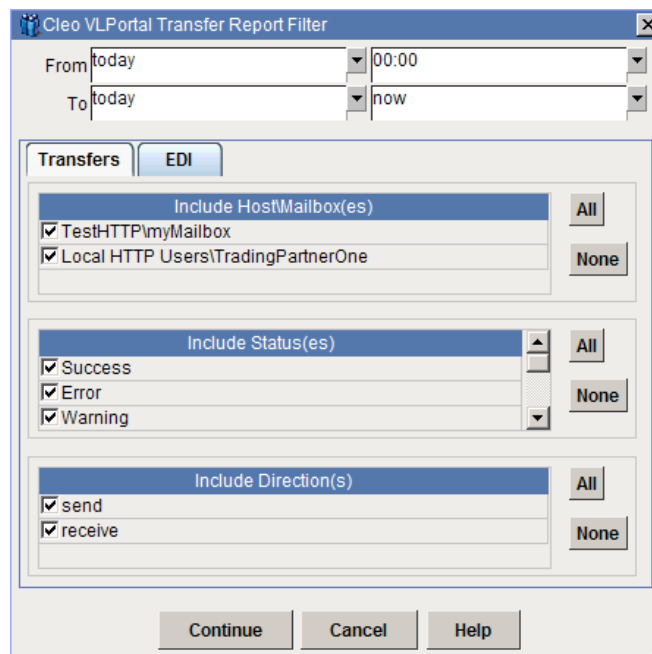
[Filter...](#) [Refresh](#) [Generate Report...](#) [Help](#)

### Section 3: Deploy Custom Community Web Portals

1. The Cleo VLPortal Transfer Report shows the status all file uploads and downloads associated with your configured mailboxes. Initially, only the current day's transfers will be displayed. You may change the period range by clicking on the [Filter...] button (see discussion of [Filter...] below). By clicking on the column headers, the table can be sorted in ascending or descending order, based on the selected column's content. You may right-click on a row to view detailed information about a transfer. Only one row may be selected at a time. When you select "View Information..." on a row, the following page is displayed in a separate browser tab.

```
Transfer ID      : HTTP-20090515_141021422-G
Host            : Local HTTP Users
Mailbox         : TradingPartnerOne
Transport       : HTTP
Start Date/Time : 2009/05/15 14:10:21
End Date/Time   : 2009/05/15 14:10:26
Direction      : receive
Status          : Exception
Filename        : TESTREALLYHUGE1.edi
Path            : local/root/TradingPartnerOne/inbox
Transfer Time (sec) : 5.44
Transfer Size (bytes): 19922127
Result Text     : Exception - java.io.EOFException: Premature EOF encountered
```

2. Press [Filter...] to customize the items you wish to display in the Cleo VLPortal Transfer Report table in the Cleo VLPortal Transfer Report Filter.



### Section 3: Deploy Custom Community Web Portals

- The From and To fields allow you to select a range of time you wish to view. You may either use the pull-down menus or enter specific information into the date (YYYY/MM/DD) and time (HH:MM) fields.
- You may filter based on specific Host\Mailboxes, Statuses, and Transfer Directions.
- Press the [All] button to select all the rows for the particular section to which the button applies.
- Press the [None] button to deselect all the rows for the particular section to which the button applies.
- Press the [Continue] button refresh the display with specified filter criteria.
- Press the [Cancel] button to cancel the operation and return to the previous display.
- Press [Help] to obtain an HTML display of this documentation. The information will be displayed in a separate browser tab.

If EDI logging is enabled on the connected VLTrader, the user can also filter based on EDI criteria. Note that the Ref # and Ack Status fields are additional EDI logging options that can be enabled by the VLTrader administrator. Partial ref #s can be wild-carded by using the special % character at the beginning or end of the search value.

The screenshot shows a dialog box titled "Cleo VLPortal Transfer Report Filter". It has a close button (X) in the top right corner. The dialog is divided into two tabs: "Transfers" (selected) and "EDI".

Under the "Transfers" tab, there are three main sections:

- Interchange:** Fields for Sender, Receiver, and Control #, each with a corresponding Qualifier field.
- Functional Group:** Fields for Function Code, Application Sender, Application Receiver, and Control #, each with a corresponding Qualifier field.
- Transaction:** Fields for Type, Control #, Ref #, Add'l Ref #s, and Ack Status.

At the bottom of the dialog are three buttons: "Continue", "Cancel", and "Help".

### Section 3: Deploy Custom Community Web Portals

1. Press [Refresh] to update the table display in the case where new items are available. The refresh re-reads the data based on the current filter and re-displays the data.
2. Press [Generate Report...] to display the report generation filter dialog. The filter dialogs (for both Transfers and EDI) were described above. When generating a report, the dialogs appear slightly different. For completeness, the dialog for transfer report generation is shown below as an example. In the **Cleo VLPortal Transfer Report Filter**:

The screenshot shows a dialog box titled "Cleo VLPortal Transfer Report Filter". At the top, there are two rows of date and time pickers: "From" (today, 00:00) and "To" (today, now). Below this, there are three sections for filtering:

- Transfers** (selected tab):
  - Include HostMailbox(es)**: A list with "TestHTTP\myMailbox" and "Local HTTP Users\TradingPartnerOne", both checked. "All" and "None" buttons are on the right.
  - Include Status(es)**: A list with "Success", "Error", and "Warning", all checked. "All" and "None" buttons are on the right.
  - Include Direction(s)**: A list with "send" and "receive", both checked. "All" and "None" buttons are on the right.

At the bottom, there are two checkboxes: "Include details" (unchecked) and "Include EDI" (unchecked). Below these are three buttons: "Generate...", "Close", and "Help".

- If **Include Details** is checked, then every transfer matching the filter criteria will be displayed in the report. If it is unchecked, only the totals will be displayed.
- Press the [Generate...] button to display the report in a separate browser tab. Below is a sample report.

## Cleo VLPortal Transfer Report

<b>Run Date</b>	2009/05/27 11:55:57
<b>From</b>	2009/05/27 00:00:00 (CDT)
<b>To</b>	2009/05/27 11:55:57 (CDT)
<b>Active Filters</b>	
<b>Transfers</b>	
<b>Hosts/Mailboxes</b>	Local HTTP Users\TradingPartnerOne

<b>Host</b>	Local HTTP Users	HTTP
<b>Mailbox</b>	TradingPartnerOne	
	Files Received	0
<b>Host</b>	Files Sent	12 Success
<b>Totals</b>	Bytes Transferred	68,051
	Transfer Time	00:00:02

- Press the [Close] button to cancel the operation and return to the previous display.
  - Press [Help] to obtain an HTML display of this documentation. The information will be displayed in a separate browser tab.
3. Press [Help] to obtain an HTML display of this documentation. The information will be displayed in a separate browser tab.



**Cleo Communications**

p 800.233.2536 | f 815.654.8294 | sales@cleo.com | www.cleo.com