

Allowing Documents To Be Viewed In Self-service

If you want Self-service users to be able to open documents against their record then certain changes may need to be made for you to accomplish this.

- Documents must be “Linked” Rather than “Embedded”.
- “Linked” Documents must be linked using a **full UNC path** and not using a mapped drive
- The Internet Information Services (IIS) user and App-Pool user must have access to the file location of the file.

How to link?

A linked file creates a hyperlink to the location of the file itself and as such it may be suitable for you to ensure that the files are stored in one location so you don't have to set up multiple permissions. To link a file simply chose the “Link” option when creating the file.

Please note – Merged documents can only be linked once they have been saved outside of simply personnel. They cannot be linked straight from the mail merge.

UNC Path

A UNC path is the specific unmapped path in which the document itself is stored. The best way to set something like this up is to create a shortcut for the Simply Personnel User to use instead of the path they use currently. You can place the shortcut where convenient then when accessing the documents and saving them as a **Link** in Simply Personnel it will show the full UNC path - (i.e. [\\servername\share](#) or [\\servername\c\\$\location](#)).

IIS User and App-Pool User

By Default in IIS the aforementioned users are the **NTAUTHORITY\IUSR** and the **NetworkService** or **AppPoolIdentity**. If the documents in question are on the same server as the IIS, these users will simply need to be added to the folders permissions (with full control). However your documents are stored on a separate server, you will need to specify both the IIS user and the App-Pool User in their respective settings. The user you choose will have to have local admin rights and have access to the location of the documents.

Please see next page for further information on how to do this.

Applying this information in IIS

The Settings are different dependant on what version of IIS you have. To find out go into your IIS and choose help, then about.

In IIS 6.0:

To access the IIS user you need to right click on the website then:

Properties | Directory Security | Authentication and Access Control [edit] | Browse

To access the App-Pool User you need to right click the App-pool being used by the website then:

Properties | Identity | Configurable | Browse

In IIS 7.0:

To access the IIS user you need to highlight the website then on the right hand window choose:

Basic Settings | Connect As | Specific User | Set

To access the App-Pool User you need to highlight the App-pool being used by the website then on the right hand window choose:

Advanced Settings | Identity [...] | Custom Account | Set

Once these are applied correctly a user should be able to log into self-service and open up the documents without error. Any errors received at this stage will most likely be permissions based. To test this you could allow a permission for "Everyone" on a test document. If you are no longer getting the error I would suggest you review these notes as there may have been a step you have missed, if you are getting an error still even with "Everyone" set please email support at support@simplypersonnel.co.uk