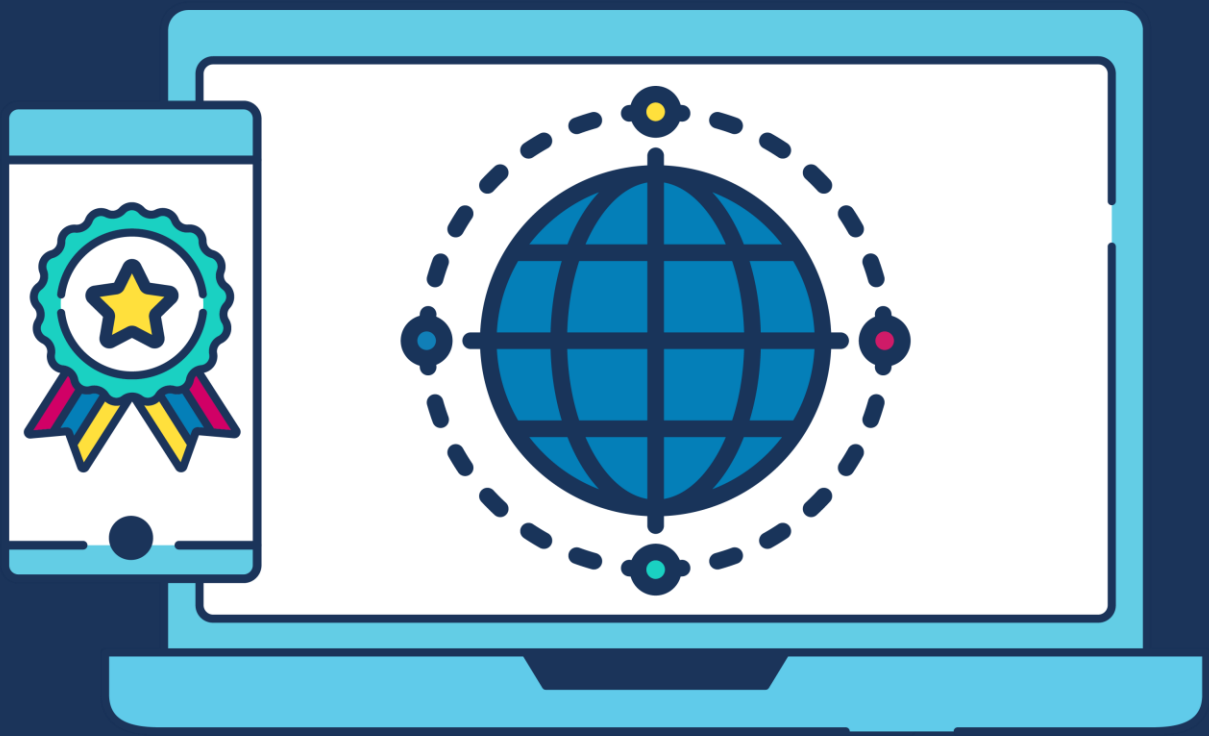
TEAM Software by WORKWAVE

Customer Portal Set Up/Configuration

TEMPLACMS

Version: v.10 (CMS6.1.0 January 2019)



COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

© Copyright 2021 TEAM Software by WorkWave

TABLE OF CONTENTS

INTRODUCTION **4**

SCHEMATIC **4**

TECHNICAL REQUIRMENTS **4**

Server 4
Client 4

IIS **5**

Configuration 5
IIS User 8

SQL SERVER CONFIGURATION **8**

CUSTOMER PORTAL CUSTOMISATION **12**

TEMPLA-CMS CONFIGURATION **12**

System Control – Customer Portal 12
Client Registration 17
Client Registration Review Batches 20
TemplaCMS types 21

© Copyright 2021 TEAM Software by WorkWave

INTRODUCTION

The TemplaCMS Customer Portal system is a two-part application consisting of both a client and server application, both will need to be installed as a single website. The client application is the front end of the system which the user will interact with using any web browser.

The server application communicates between the frontend client application and the TemplaCMS Customer Portal database, which retrieves its data from the TemplaCMS database using SQL views.

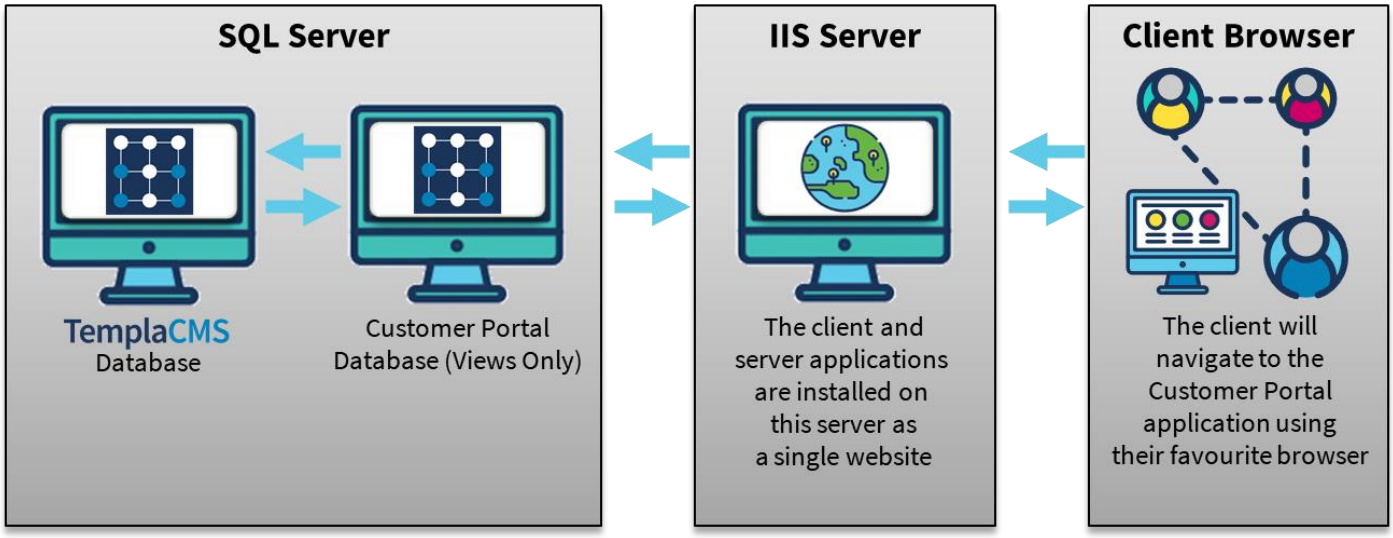
> **The setting up of a secure connection via HTTPS and port forwarding is the responsibility of the client's IT department or their external IT support company.**

The TCP port will also need to be opened up to allow the TemplaCMS Customer Portal application to be accessible from outside your network; this will also be the responsibility of the client's IT department.

A database is also required, which contains only views so no actual data is stored here. The views will retrieve data from the TemplaCMS database tables, the data is then sent through the server application and sent back to the client application for the user to view and interact with.

For added security all connections to the server application require a valid authentication ticket that TemplaCMS provides once the user has successfully logged on to the TemplaCMS Customer Portal application. If a connection is detected without a valid authentication ticket the connection is severed and we also recommend that a SSL certificate is installed on the server.

SCHEMATIC



TECHNICAL REQUIRMENTS

Server

Microsoft IIS must be installed on at least one server, IIS will host both the client and server applications, we recommend IIS version 7, however version 6 is acceptable.

Microsoft SQL Server is required to host the TemplaCMS Customer Portal database, it is recommended that SQL Server 2008 R2 is used, the database must be accessible by the TemplaCMS Customer Portal server application, it is also recommended for performance reasons the database be held on the same instance as the TemplaCMS database.

Client

TemplaCMS Customer Portal has been designed to be available across all major browsers; although still accessible the application will not perform so well on a small mobile device browser. Users browsers will need to allow 'JavaScript' (most browsers are set to ON by default), for the application to function.

© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

IIS

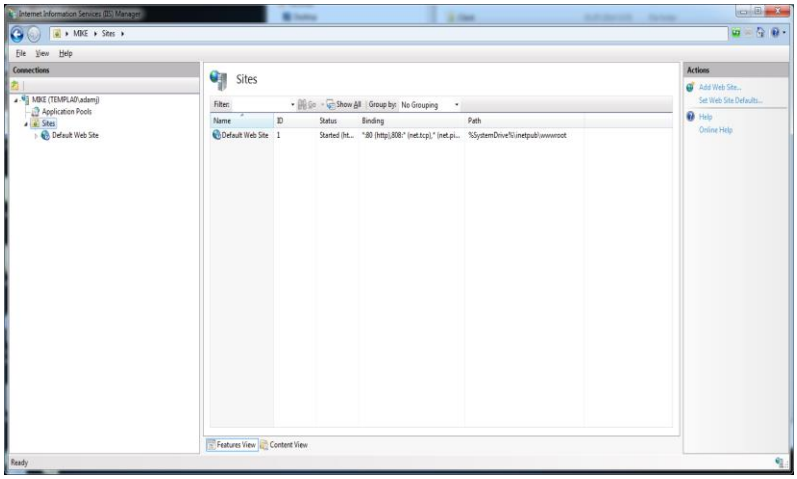
Configuration

A folder containing both the Server and Client applications would have been sent to you, please move this folder to the ‘inetpub’ folder normally installed on the **C** drive.

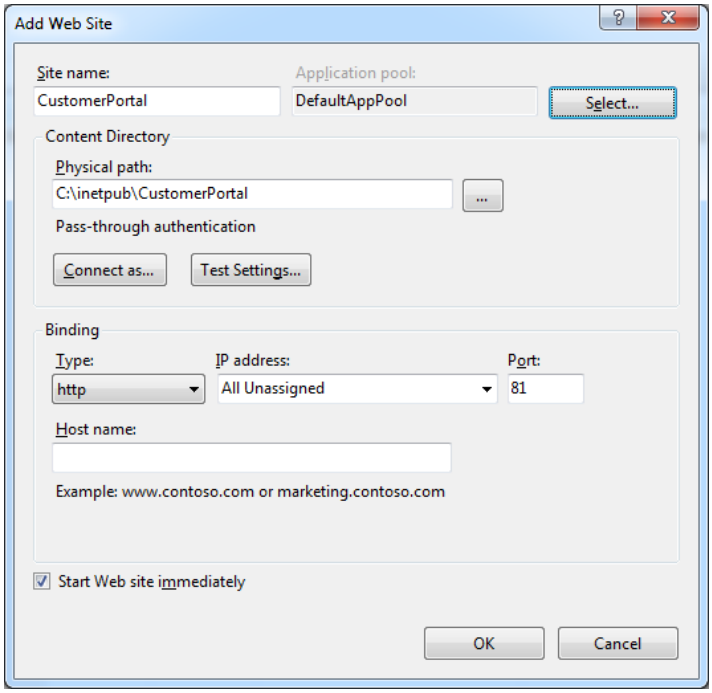
The next step is to setup IIS to serve the TemplaCMS Customer Portal application.

Follow these steps below:

1. Open IIS:

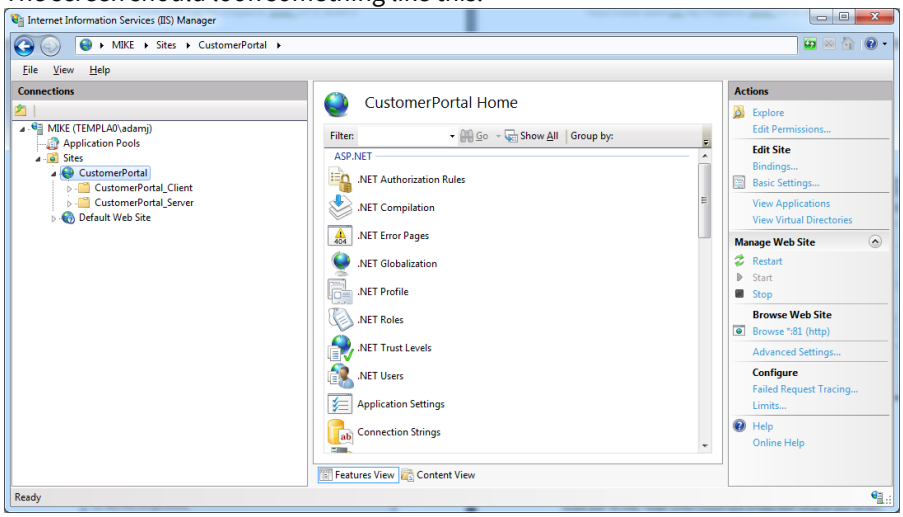


2. Right click the ‘Sites’ folder and click ‘Add Web Site’
3. The form will need to be filled in as below **(Please note, you will need to seek advice from your IT department or IT provider what port number to use, 81 has been used for demonstration purposes)** if the ‘Customer Portal folder has been copied to different location then the physical path will need to be adjusted to the correct path.

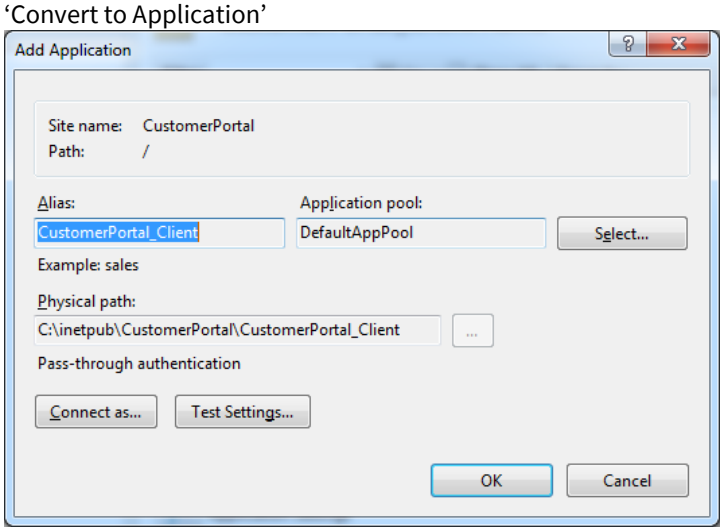


© Copyright 2021 TEAM Software by WorkWave

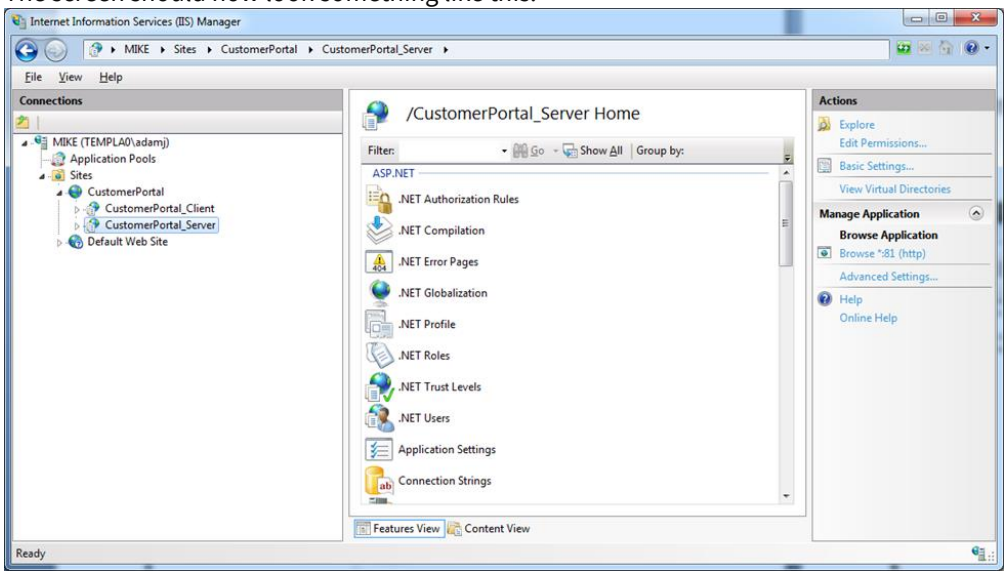
4. The screen should look something like this:



5. IIS will now need to be configured to serve the client and server applications.
   First select the folder in IIS under the CustomerPortal folder 'CustomerPortal_Client' right click and select 'Convert to Application'



6. Click 'OK' on this screen.
7. Repeat Step 5 but instead of selecting 'CustomerPortal_Client' now select 'CustomerPortal_Server'.
8. The screen should now look something like this.

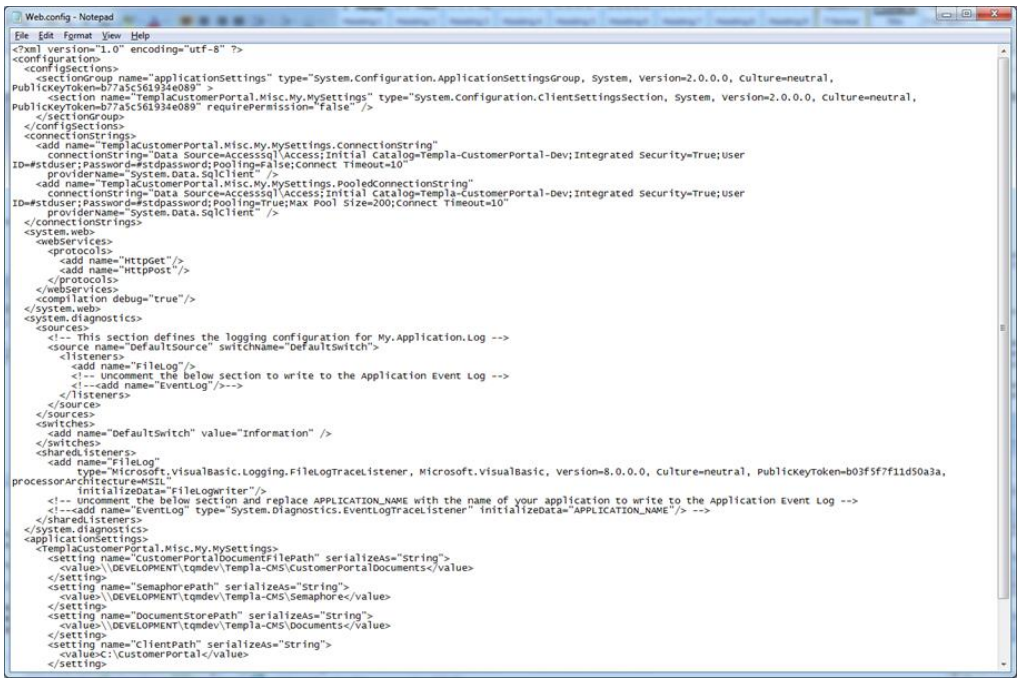


© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

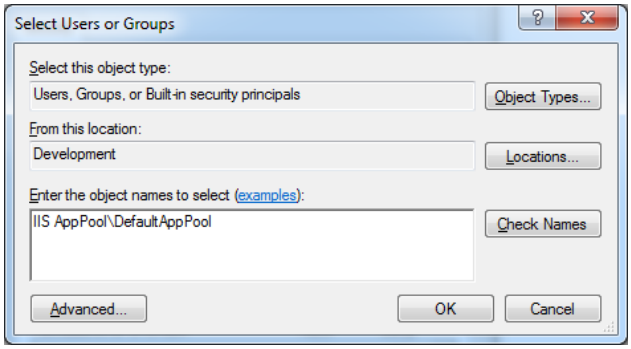
9. The configuration file will now need to be edited; this contains some settings such as the database connection string.The configuration file should be located in:

   C:\inetpub\CustomerPortal\CustomerPortal_Server\Web.config

   > **If the CustomerPortal folder was copied somewhere different to what is detailed in this document please locate the web.config file in the CustomerPortal_Server folder**



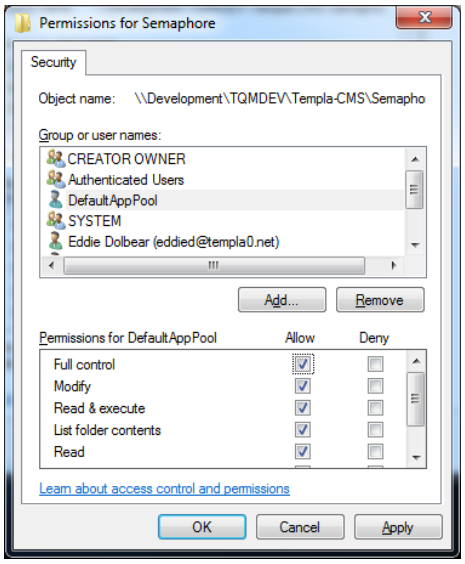
10. In this file please locate the connection strings, adjust this according to your server and database name.
    Adjust the settings at the bottom of the configuration file:
    - **CustomerPortalDocumentFilePath:** This is the path where the Customer Portal documents are to be placed; we don't recommend that this be the same folder where TemplaCMS manages its document store
    - **SemaphorePath:** This will need to be where TemplaCMS reads/writes its semaphore file to
    - **DocumentStorePath:** This should be where TemplaCMS reads/writes its documents to
    - **ClientPath:** This should be where the TemplaCMS Customer Portal client application is installed, this should be unless the Customer Portal folder was copied to another location: C:\inetpub\CustomerPortal\CustomerPortal_Client.
    - **ErrorLogPath:** Please enter a path where any error logs that are generated should to be stored
11. The security rights will need to be adjusted for the CustomerPortalDocumentFilePath, SemaphorePath and ErrorLogPath.
    Locate the folder and right click and select 'Properties', select the 'Security' tab, then select 'Edit', click 'Add'



    Please enter the object name as above (If the 'DefaultAppPool' has not been used please make sure this is set above to the correct AppPool), make sure the location is set to the server, and click 'OK'.

© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

Now set to ‘Full Control’, as is in the screenshot below.



To complete please click ‘**Apply**’

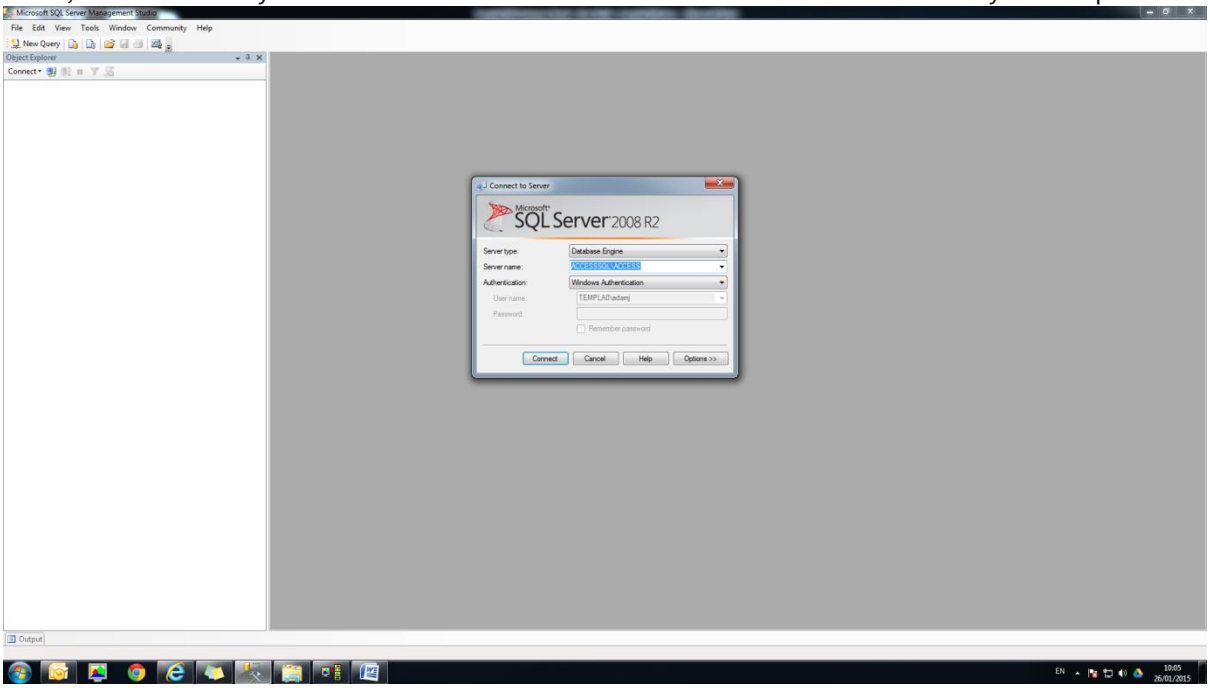
IIS User

The IIS user must have the necessary read/write permissions to the folder structure.

SQL SERVER CONFIGURATION

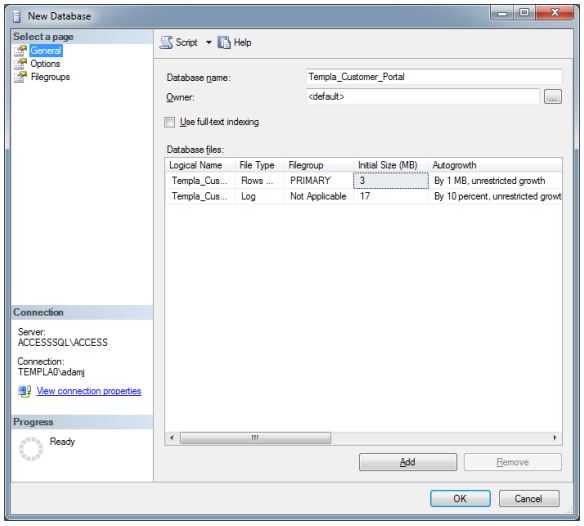
A SQL file would have been sent to you, this file contains all the necessary code the setup the database required to connect to your TemplaCMS database.

1. Please open your SQL server management server and connect to the instance where you would like this database to reside, we recommend you install the Customer Portal database on the same instance as your TemplaCMS database.

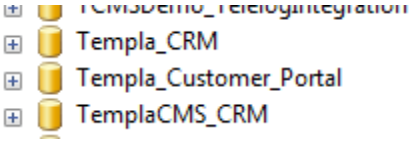


2. Once you have connected, please right click on the ‘Databases’ folder and click ‘New Database’.
3. Then enter the database name and click ‘OK’.

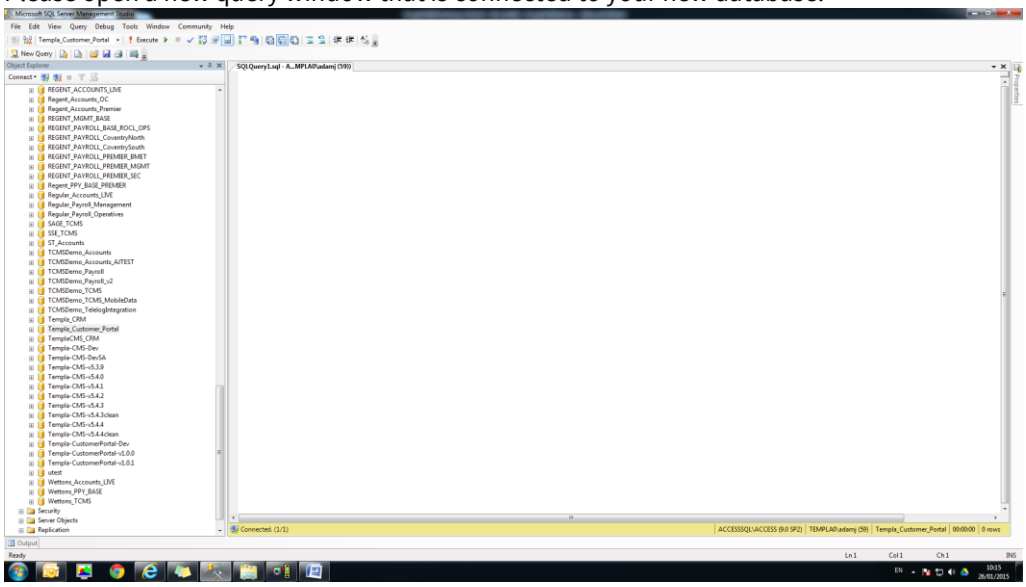
© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal



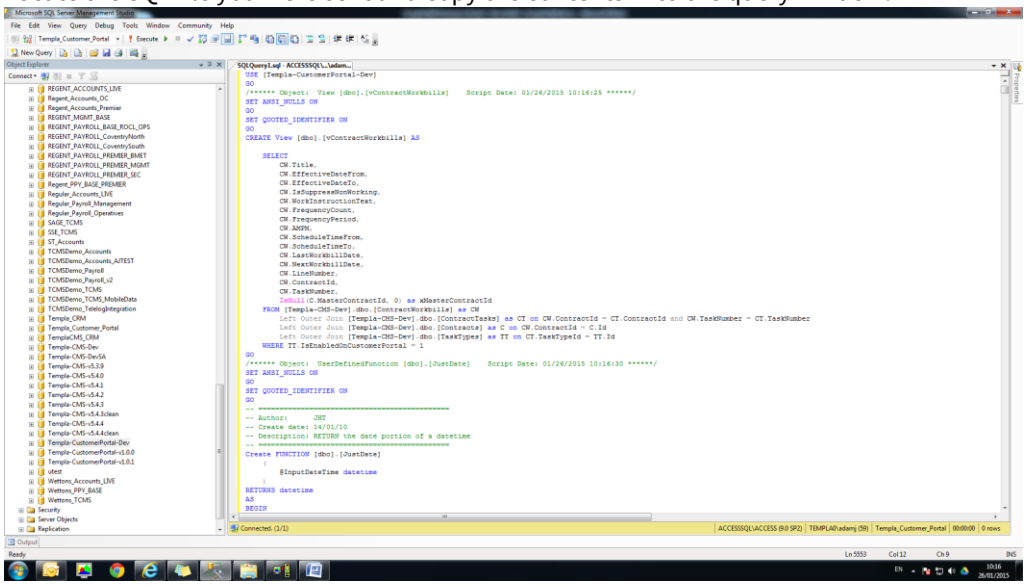
Your new database should now have been created.



4. Please open a new query window that is connected to your new database.

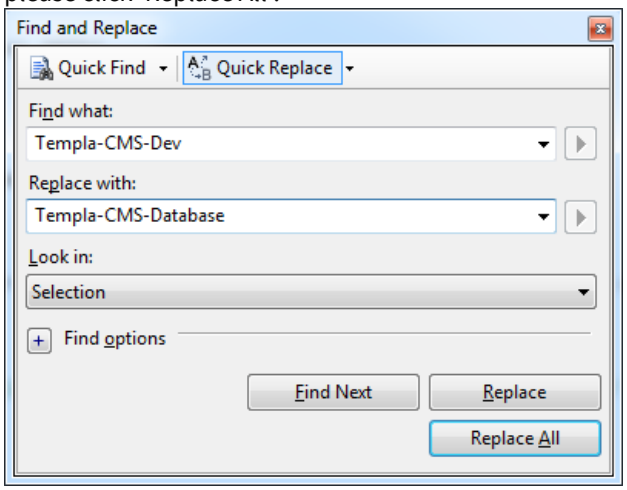


5. Locate the SQL file you were sent and copy the contents in to the query window.

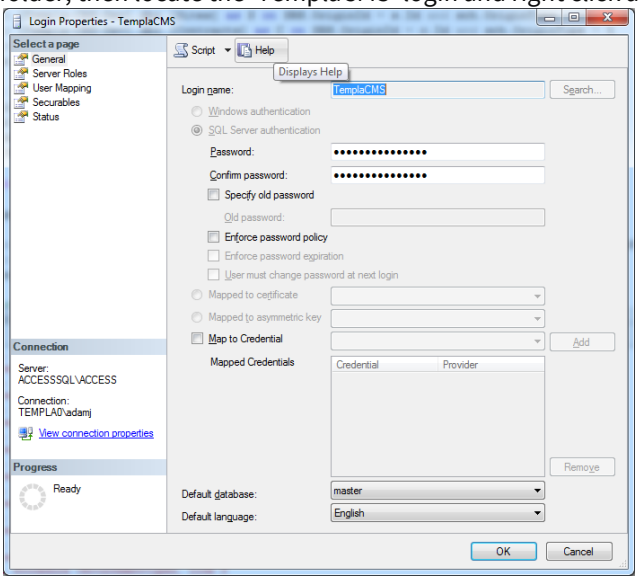


© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

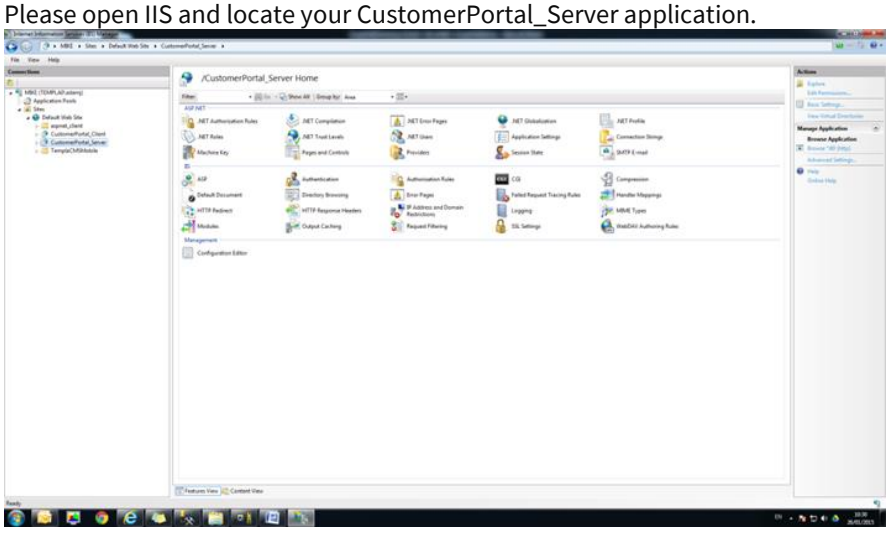
6. You need to make sure the script is going to point to your TemplaCMS database, to do that please press Ctrl-F and select ‘Quick Replace’, The ‘Replace with’ text box must contain the name of your TemplaCMS database, this must not be the name of your new database, make sure the ‘Look in’ drop down box is set to ‘Current Document’, then please click ‘Replace All’.



7. Then press F5 to execute the script.
8. You have one security setting you must set, please expand the ‘Security’ folder and locate and expand the ‘Logins’ folder, then locate the ‘TemplaCMS’ login and right click and select ‘Properties’.

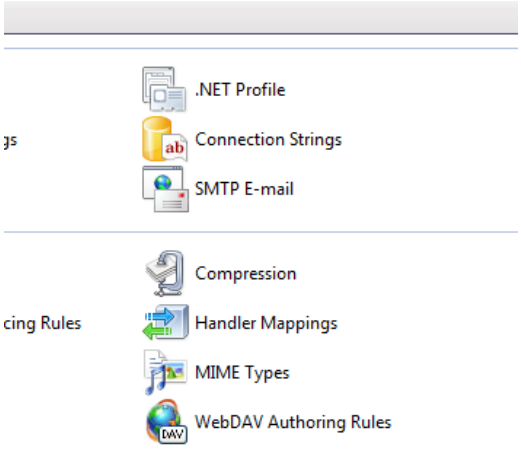


9. On the left hand navigator on the properties screen please locate and click ‘User Mapping’,
   In the list please locate your new Customer Portal database and click the ‘Map’ check box, the on then in the database role grid please also make sure the ‘db_owner’ check box is checked, then click ‘OK’.
   Your database is now configured; please follow the next steps to link your new database to the Customer portal database
10. Please open IIS and locate your CustomerPortal_Server application.

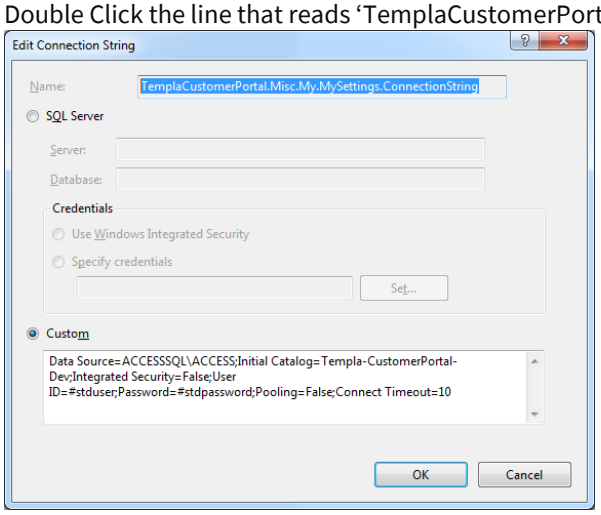


© Copyright 2021 TEAM Software by WorkWave

11. Double click the ‘Connection Strings’ menu option



12. Double Click the line that reads ‘TemplaCustomerPortal.Misc.My.MySettings.ConnectionString’



Please change ‘ACCESSSQL\ACCESS’ to your instance, and change the ‘Catalog' Templa-CustomerPortal-Dev to your new customer portal.

13. Repeat step 10 but change the ‘TemplaCustomerPortal.Misc.My.MySettings.PooledConnectionString’.

Your database is now fully configured and connected to you customer portal application.

© Copyright 2021 TEAM Software by WorkWave

CUSTOMER PORTAL CUSTOMISATION

The Customer Portal has our default look & feel but can be customised by the end client or their website developers (if required) in the following ways:

- **Index.html** can be changed (i.e. to include your accreditations, background image, etc) but the app placeholder and buttons area must be retained
- The **navigation.ccs** & **navigation.js** must not be updated, so if there is a need to override the look & feel, the contents of this **.css** file can be overridden
- The **logo** can be replaced
- Any revised **image buttons** for existing Customer Portal buttons can be placed within the buttons IIS folder (i.e. C:\inetpub\CustomerPortal\CustomerPortal_Client\Buttons) with the same names; for each button there are 3 png's:
    - **Disabled icon** pre logon – this is grey by default on our pre-delivered icons
    - **Mouse-Off icon** once logged on
    - **Mouse-On icon** if hover over the icon
- Any new **image buttons** (e.g. for binder links or URL's) are best placed in the document store folder (i.e. \\...\TemplaCMS\DocumentStore) to avoid any permission issues, with the name of these files matching the binder link code; for each button there are 3 png's:
    - **Disabled icon** pre logon – this is grey by default on our pre-delivered icons
    - **Mouse-Off icon** once logged on
    - **Mouse-On icon** if hover over the icon

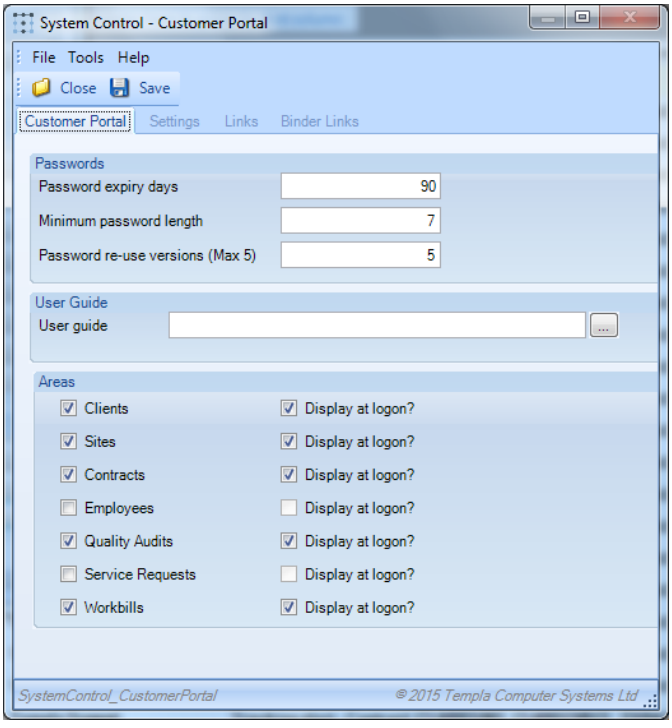
  Once placed in the Document Store and the binder links updated, these .png's will be copied across to the
- A link from your main website to the Customer Portal can be added; conversely links from the Customer Portal to your main or other industry website can be added by defining URL's in which case the process for defining the buttons for these links is the same as for binder links.

TEMPLA-CMS CONFIGURATION

TemplaCMS Customer Portal can be configured to allow all clients to be registered by default, without each client needing to be manually registered.

System Control – Customer Portal

SYSTEM CONTROL – CUSTOMER PORTAL TAB



© Copyright 2021 TEAM Software by WorkWave

Password expiry days: This setting allows the user to define how many days each client password is valid for (if after the expiry date the client tries to login to TemplaCMS Customer Portal they will be forced to change their password).

Minimum password length: This allows the user to define the minimum password length.

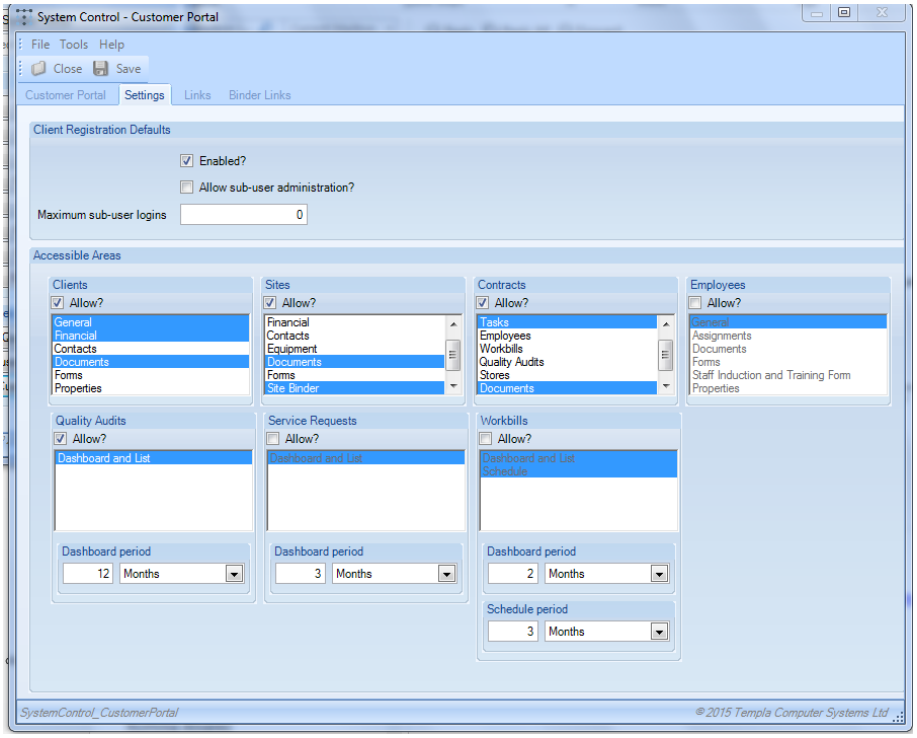
Password re-use versions (Max 5): This setting allows the user to define how many password versions the system will store (e.g. if the user set this to three the system will store the last three passwords a client has used. When the client is asked to change their password it will be checked against the stored passwords and if the new password has already been used then they will need to try setting another password).

User guide: This is the path to the User Guide that the TemplaCMS Customer Portal user can download from the website.

Areas: This allows the user to define what areas of the TemplaCMS Customer Portal will be available to the client.

Display at Logon: This allows the user to control which buttons (i.e. areas) display when initially hitting the logon webpage as if different clients have access to different areas then just the logon button or just the common areas could be displayed at logon.

SYSTEM CONTROL – SETTINGS TAB



This settings tab allows the user to set the default settings for all client registrations as a default.

Enabled: Set this setting if the requirement is to allow all clients to be automatically allowed to sign in via TemplaCMS Customer Portal.

Allow sub-user administration: This setting allows the user to set whether the client's administrator can setup multiple sub-users.

Maximum sub-user logins: This allows the user to define the maximum number of sub-users that can be defined for each client.

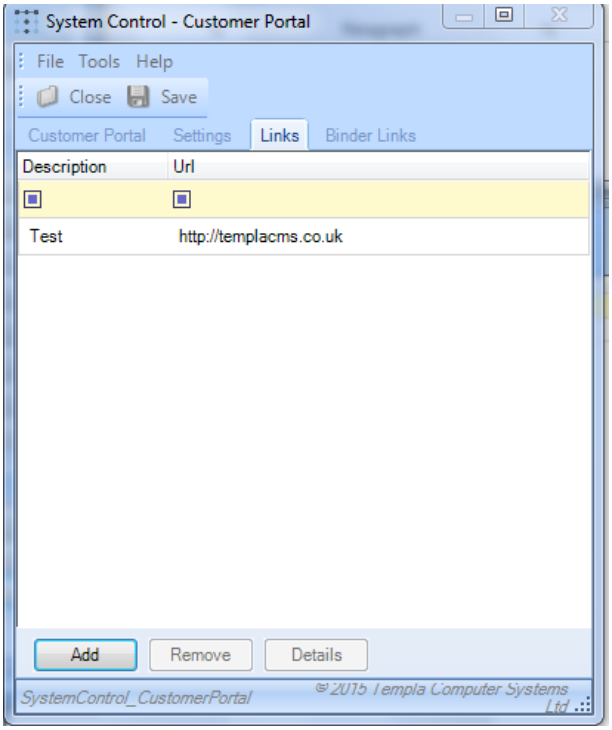
QA dashboard period: Use this setting to define the default QA dashboard period, e.g. if the user set this to three months, the QA filter in TemplaCMS Customer Portal will automatically default to today's date as the 'To' month/year and the 'From' month/year would be the date, three months previous.

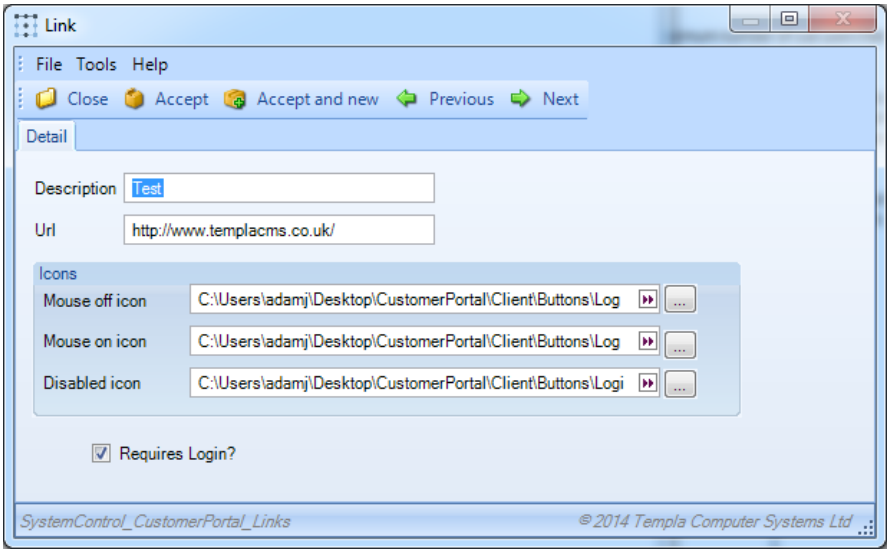
Accessible Areas: This allows the user to define what areas of the system are allowed to be used by the clients; in each area the user can also define what tabs (sub-areas) will be accessible to each client.

© Copyright 2021 TEAM Software by WorkWave

SYSTEM CONTROL – LINKS TAB

This feature allows the user to add 3rd party application links on the main TemplaCMS Customer Portal page:





Description: The description of the Link.

URL: This allows the user to set the URL of the link.

Mouse off icon: This allows you to set the mouse off icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the mouse is not hovered over the link.

Mouse on icon: This allows you to set the mouse on icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the mouse is hovered over the link.

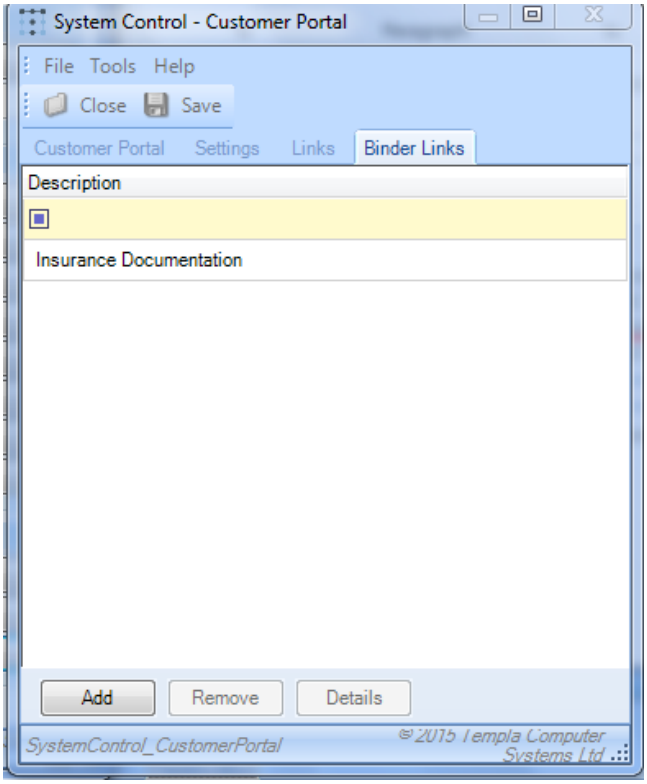
Disabled icon: This allows you to set the Disabled icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the user is not logged in to TemplaCMS Customer Portal will only be visible if the 'Requires Login' is set to true.

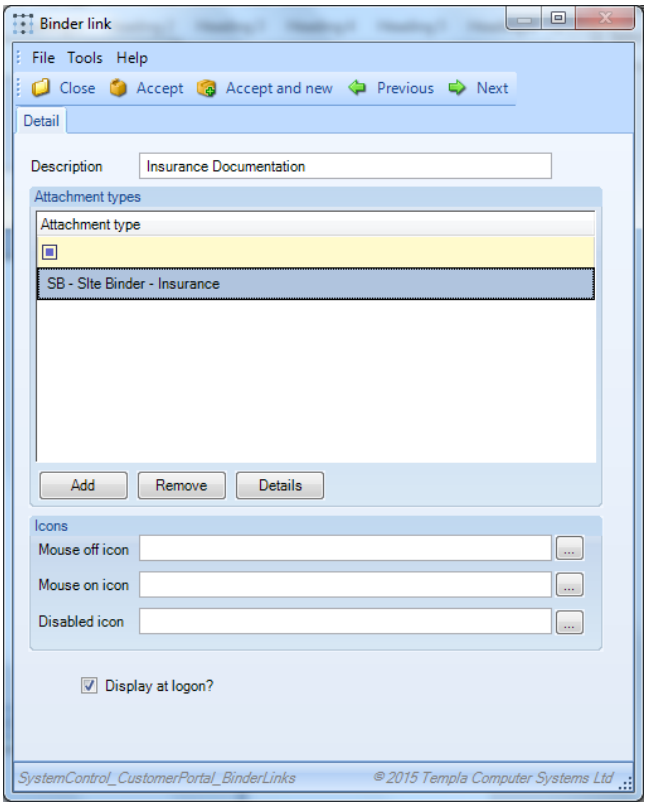
Requires Login: This allows the user to set whether the Link will only be accessible by the user once they have successfully logged in.

© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

SYSTEM CONTROL – BINDER LINKS

This option allows extra buttons on the portal which will contain all documents listed for the attachment types selected that appear on the client's site binder.





Description: The description of the attachment.

Attachment types: This allows the user to select the desired attachment type(s).

Mouse off icon: This allows you to set the mouse off icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the mouse is not hovered over the link.

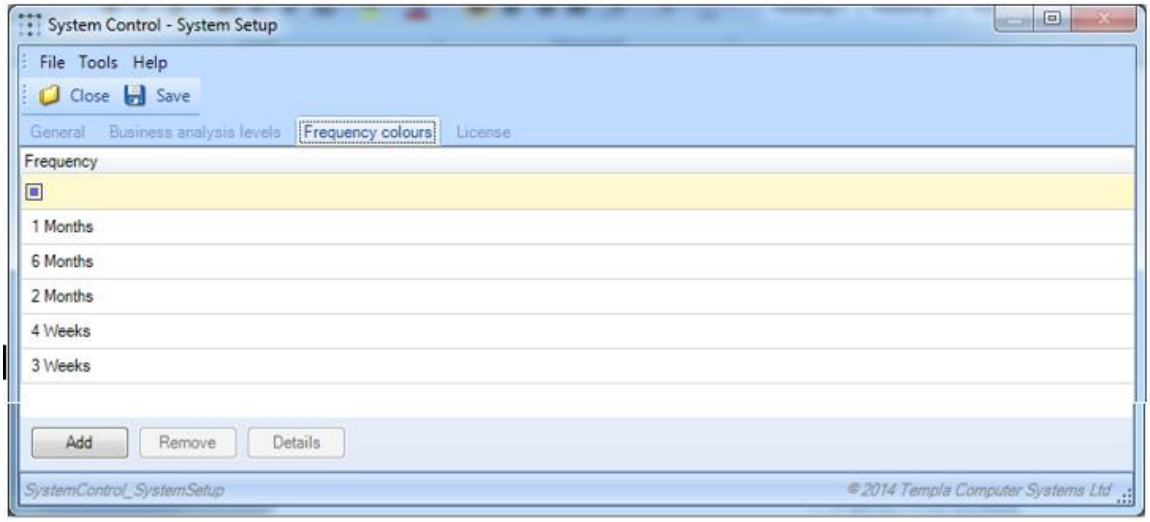
© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

Mouse on icon: This allows you to set the mouse on icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the mouse is hovered over the link.

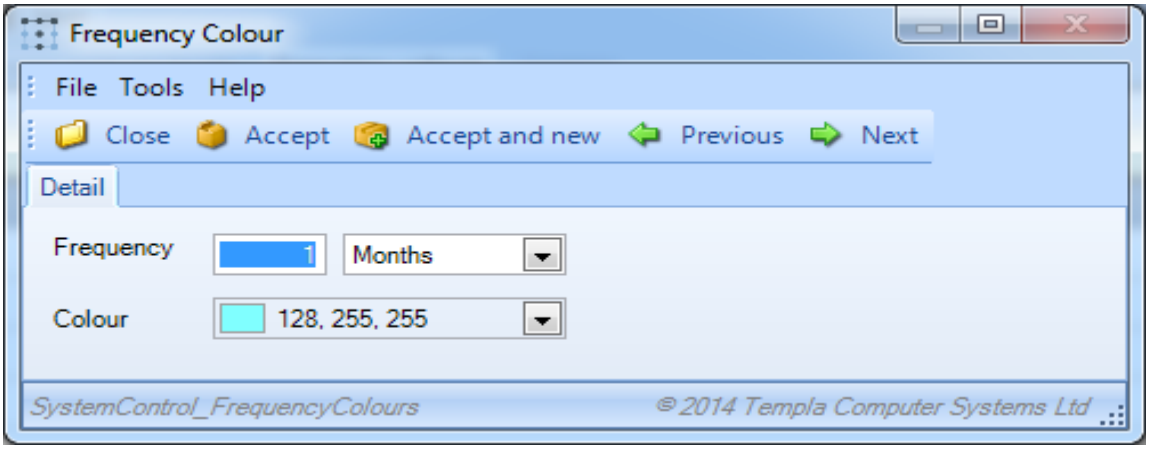
Disabled icon: This allows you to set the Disabled icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the user is not logged in to TemplaCMS Customer Portal.

Display at Logon: This allows the user to control which buttons (i.e. areas) display when initially hitting the logon webpage as if different clients have access to different areas then just the logon button or just the common areas could be displayed at logon.

SYSTEM CONTROL – FREQUENCY COLOURS TAB



The frequency colours allow users to setup the colour that will be displayed if a workbill is of the specified frequency period.

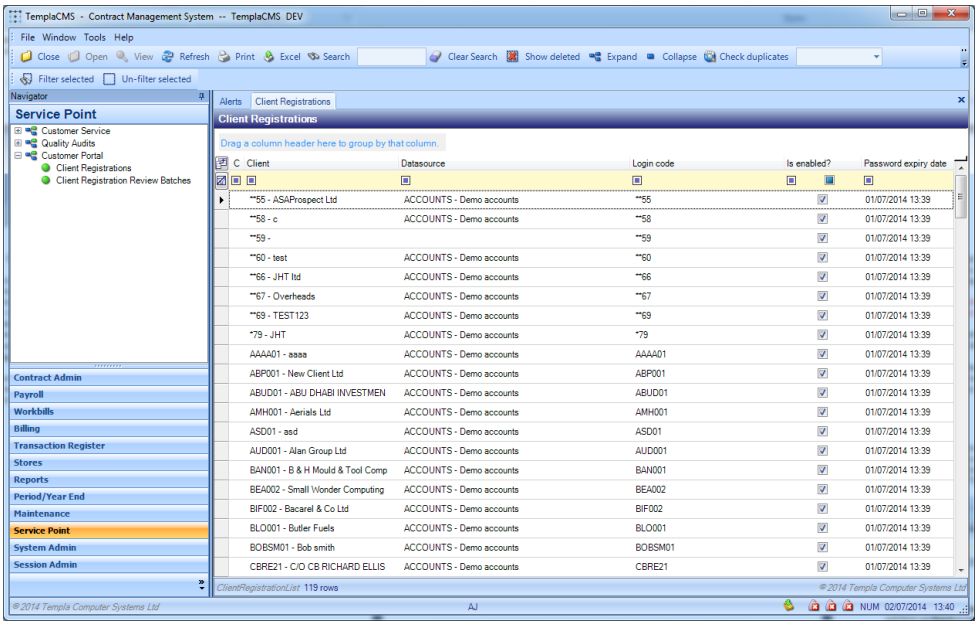


Frequency: The frequency period.

Colour: The colour the frequency will be highlighted on the workbill list within TemplaCMS and in the workbill schedule view within TemplaCMS Customer Portal.

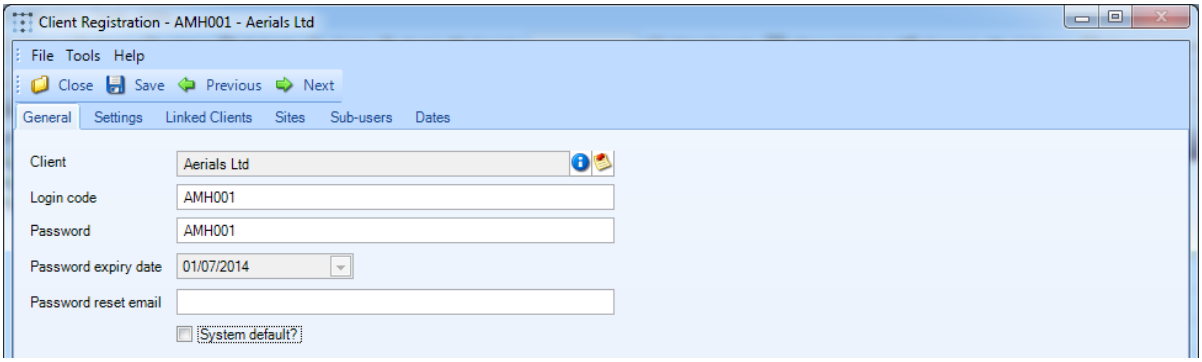
© Copyright 2021 TEAM Software by WorkWave

Client Registration



The client registration is what defines how each client will login into TemplaCMS Customer Portal and what specific areas are accessible to them.

No client registrations can be manually added or deleted as this list is all clients available in TemplaCMS. Clients may have been created through setup in Access Dimensions or directly within TemplaCMS, with the client registration settings defaulted from System Control, see previous section.



Client: This is the client that the registration is for.

Login Code: This is the Login code that the user will use to log in to TemplaCMS Customer Portal (defaults to the Client code).

Password: This is the password that the user will use to log in to TemplaCMS Customer Portal (defaults to the Client code).

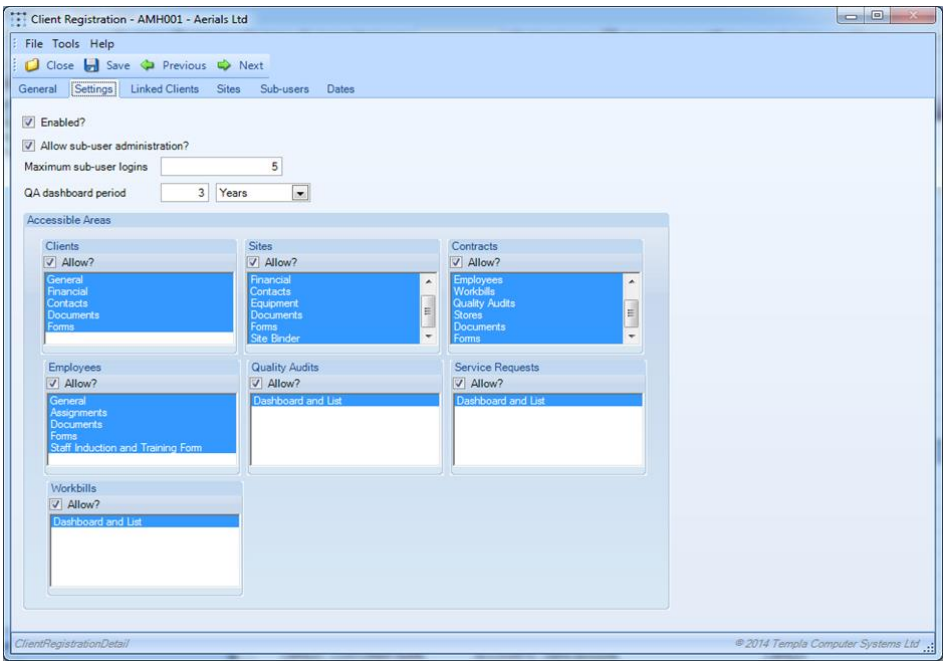
Password expiry date: This is a read only setting that will show the date the password will expire, defaulting to yesterday which will force the client to change the password on first login.

Password reset email: This allows you to set the email address that TemplaCMS will send a forgotten password to. If this is initially left blank, when the client administrator first logs in they will be forced to supply one.

System default?: This allows the user to set whether the client registration will get it's settings from System Control. If not checked another Tab is accessible for Settings which allows you to override the System Control defaults for the current client. This is checked by default for all clients.

© Copyright 2021 TEAM Software by WorkWave

CLIENT REGISTRATION – SETTINGS



Enabled?: This setting allows the user to control whether a client can log in or not to TemplaCMS Customer Portal.

Allow sub-user administration: This setting allows the user to set whether the client administrator can setup and maintain sub-users.

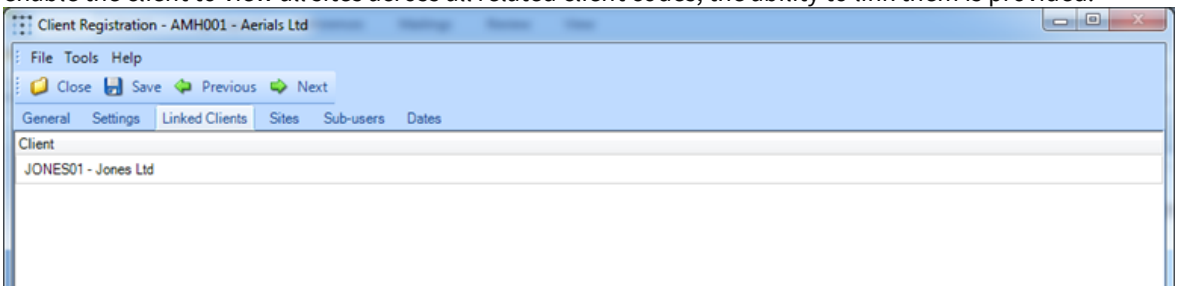
Maximum sub-user logins: This allows the user to define the maximum number of sub users that can be defined for this client.

QA dashboard period: Use this setting to define the QA dashboard period (e.g. if the user set this to six months for this client, the QA filter in TemplaCMS Customer Portal would automatically default to today's date as the 'To' month/year and the 'From' month/year would be the date, six months previous).

Accessible Areas: This allows the user to define what areas of the system are allowed to be used by this client; in each area you can also define what tabs (sub-areas) will be accessible.

CLIENT REGISTRATION – LINKED CLIENTS

Standard access to Customer Portal is through login entry of the financial accounting system's client code; however, some clients may have multiple client codes within that system, to handle financial accounting requirements of the client. To enable the client to view all sites across all related client codes, the ability to link them is provided.

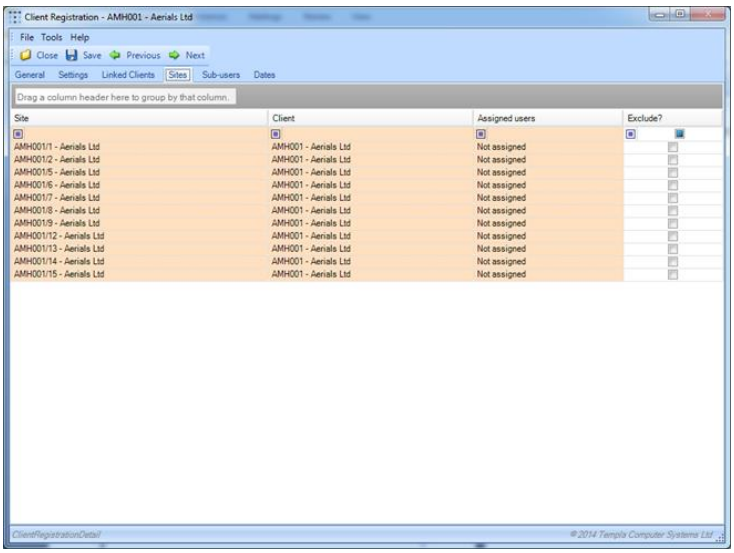


The access to Customer Portal will be agreed with the client under the primary client code, then this function allows you to link other client codes to the primary client. This then means all of the primary and linked client sites and their details will be retrieved in TemplaCMS Customer Portal under the single primary client code.

Some primary clients (e.g. managing agents) lose their contracts periodically and therefore any linked client codes will need to be transferred easily to the new primary client. The transfer button allows you to transfer clients in from another client registration.

© Copyright 2021 TEAM Software by WorkWave
TEAM Software by WorkWave | teamsoftware.com/legal

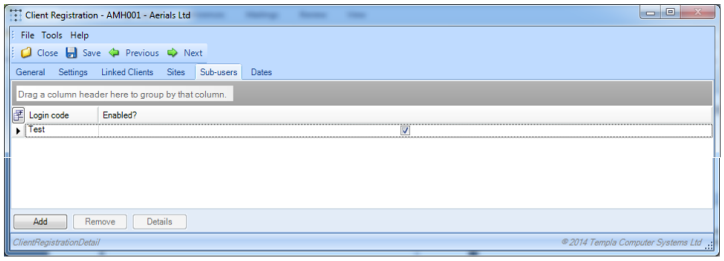
CLIENT REGISTRATION – SITES



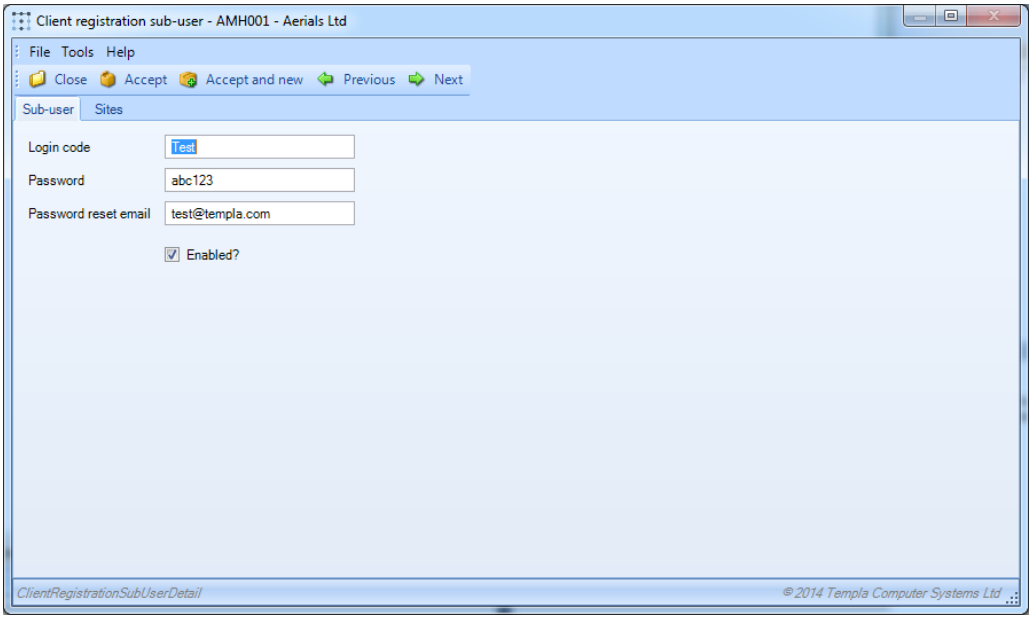
This function will list all sites assigned to the client and any linked clients, identifying where the client's administrator may have assigned them to their sub-users, see 'assigned users'.

This also allows the user to exclude access to selective sites, by setting the checkbox.

CLIENT REGISTRATION – SUB-USERS



The client registration sub-users function allows the user to **Add**, **View** and **Delete** sub-users for the client, in the same way that the client's administrator can via TemplaCMS Customer Portal, if they have been setup to do so.



Login Code: This is the Login code that the sub-user will use to log in to TemplaCMS Customer Portal.

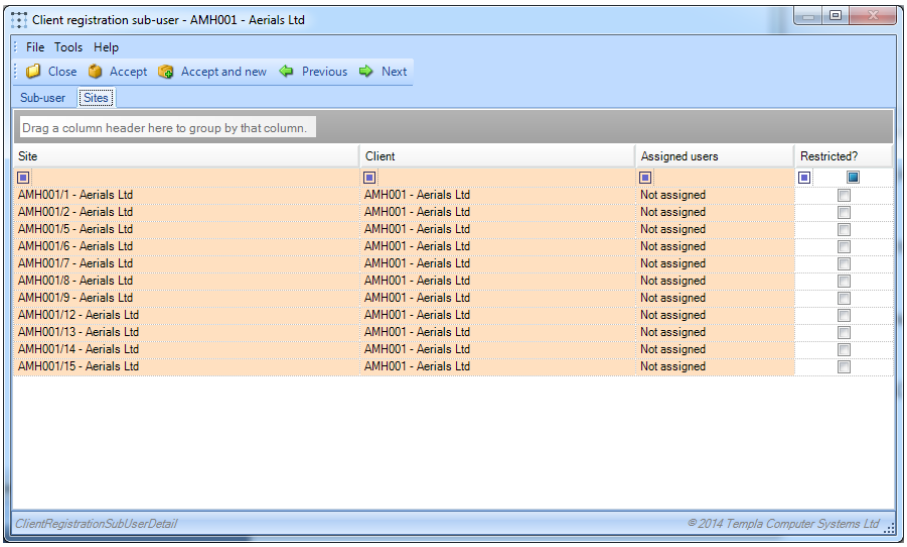
Password: This is the password that the sub-user will use to log in to TemplaCMS Customer Portal.

© Copyright 2021 TEAM Software by WorkWave

Password reset email: the user will be forced to enter a password reset email address; TemplaCMS will send any forgotten passwords to this address.

Enabled?: This allows the user to stop the sub-user's access to TemplaCMS Customer Portal.

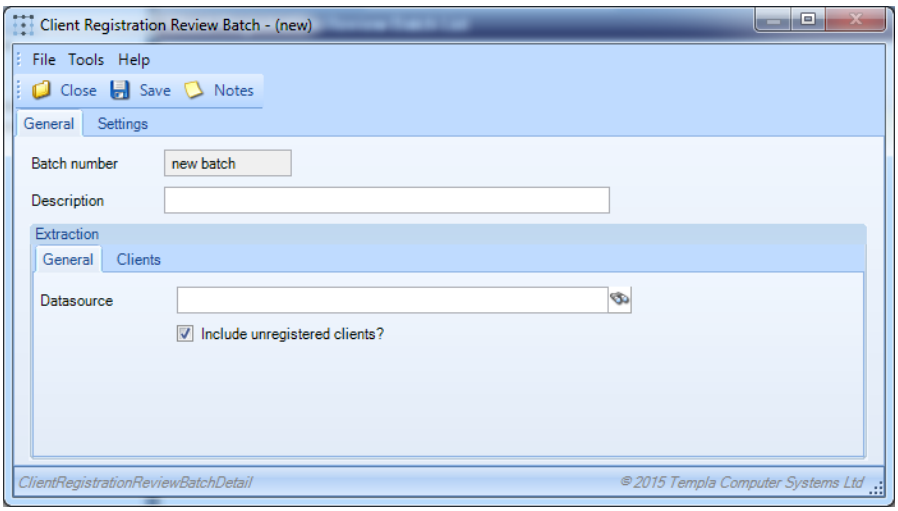
Client Registration – Sub-users – Sites



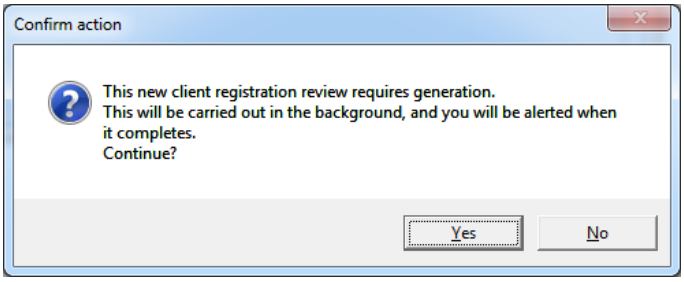
This function allows the user to restrict the sub-users' access to any of the client's sites, therefore if a client has a sub-user that manages only two of the client's sites, the user would select the sites here, and then when the sub-user logs in via TemplaCMS Customer Portal only the restricted sites' data will be available.

Client Registration Review Batches

A client registration review batch can be created to allow multiple amendments to the client registration details, either for a whole datasource or a list of clients.

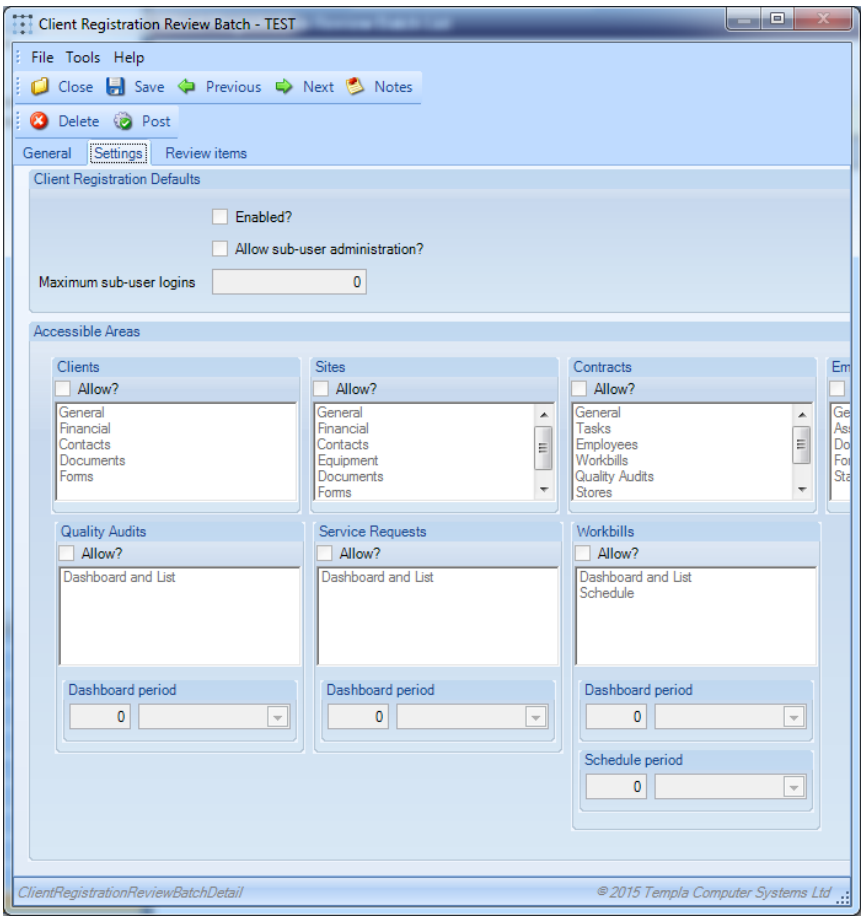


When saved, this jobs runs in the background:



© Copyright 2021 TEAM Software by WorkWave

Once the batch has been generated, the settings tab will allow changes to be made to all the 'Review Items' pulled into the batch:

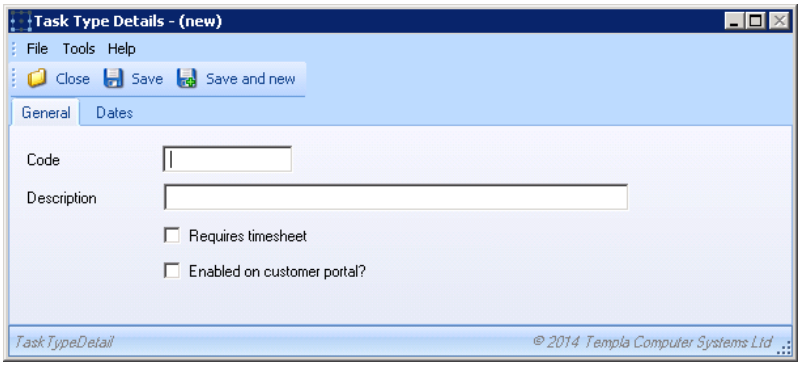


The batch can then be (deleted or) posted.

TemplaCMS types

TASK TYPES

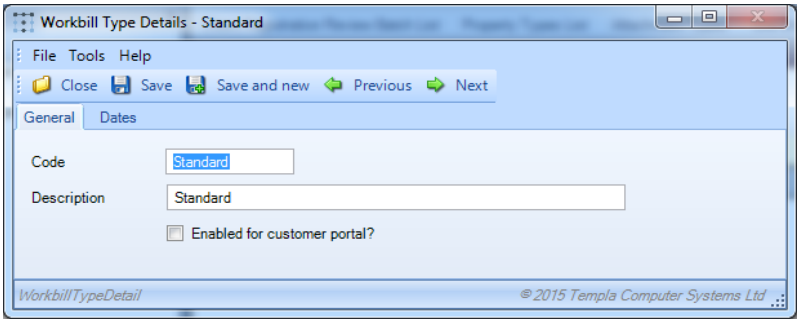
Task types can be restricted as to whether they appear on the Customer Portal



© Copyright 2021 TEAM Software by WorkWave

WORKBILL TYPES

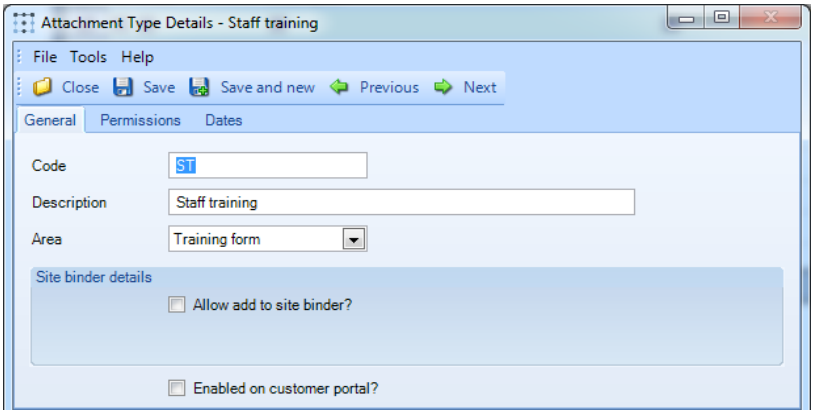
Workbill types can be restricted as to whether they appear on the Customer Portal:



These work in conjunction with the task types.

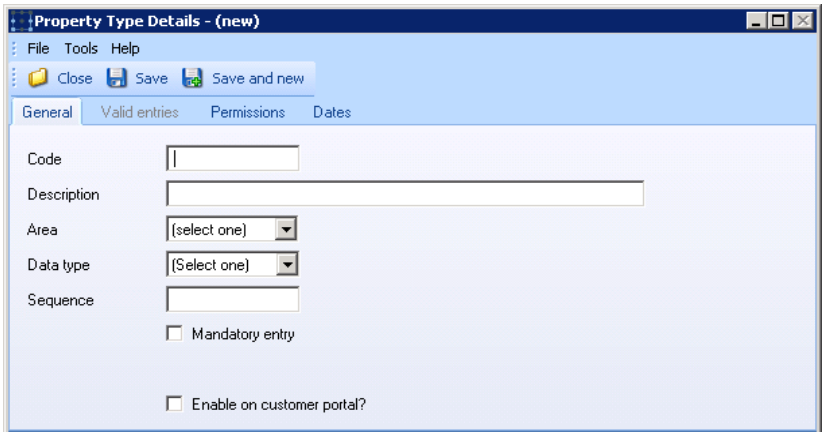
ATTACHMENT TYPES

Document attachment types can be restricted as to whether they appear on the Customer Portal, be that directly or as part of the Site Binder:



PROPERTY TYPES

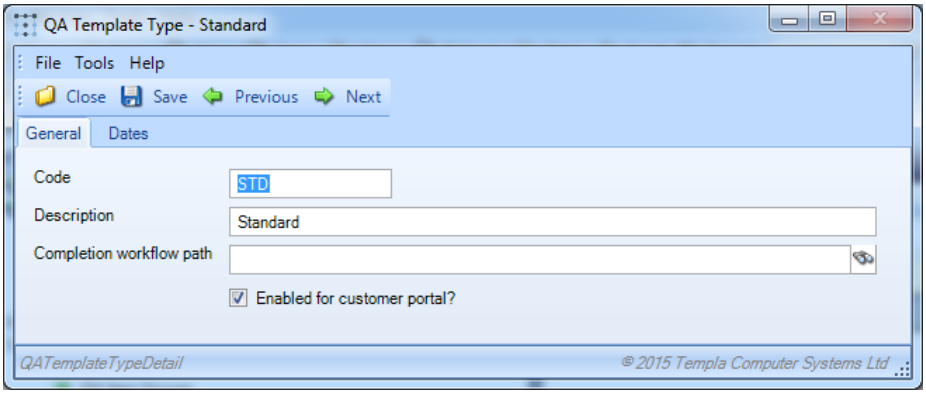
Property types can be restricted as to whether they appear on the Customer Portal:



© Copyright 2021 TEAM Software by WorkWave

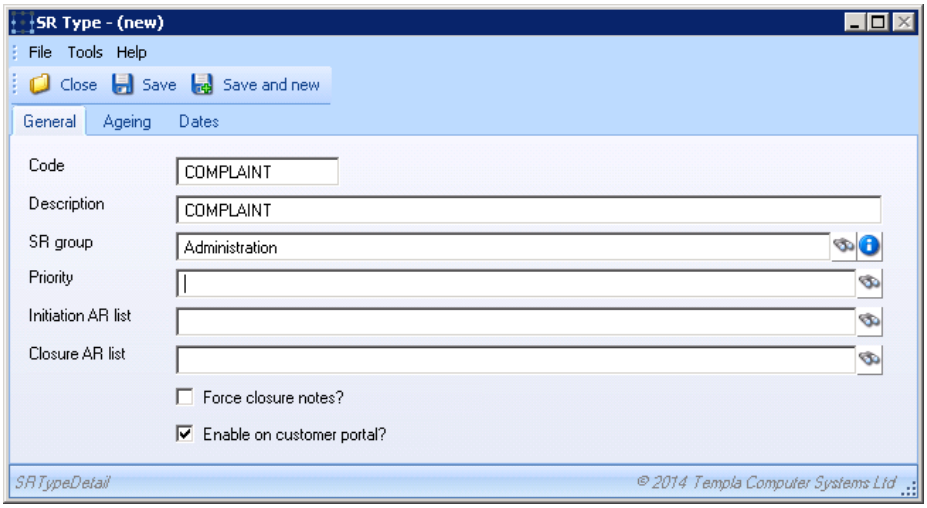
QA TEMPLATE TYPES

QA template types can be restricted as to whether they appear on the Customer Portal:



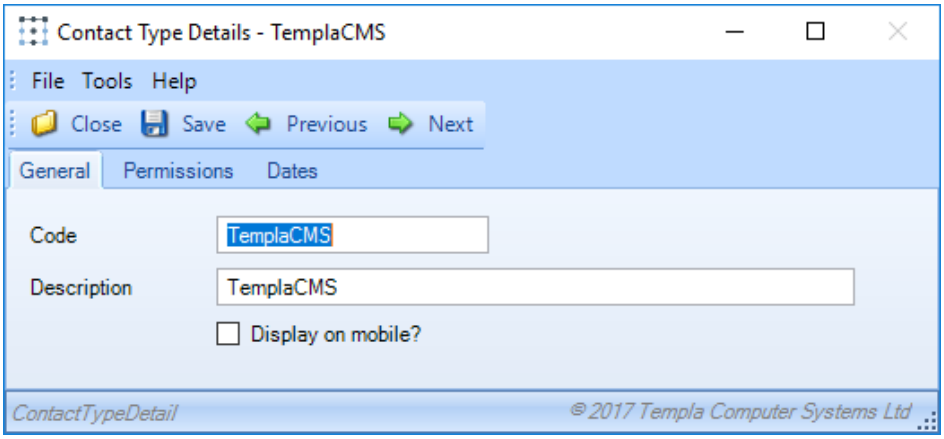
SR TYPES

SR types can be restricted as to whether they appear on the Customer Portal:



CONTACT TYPES

Contact types can be restricted as to whether they appear on the Customer Portal, as it is likely that TemplaCMS-based site-level operational contacts are required but Accounts-based client-level financial contacts are not required:



© Copyright 2021 TEAM Software by WorkWave

TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.