

Customer Portal Set Up/Configuration

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



COMMERCIAL STATEMENT

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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.

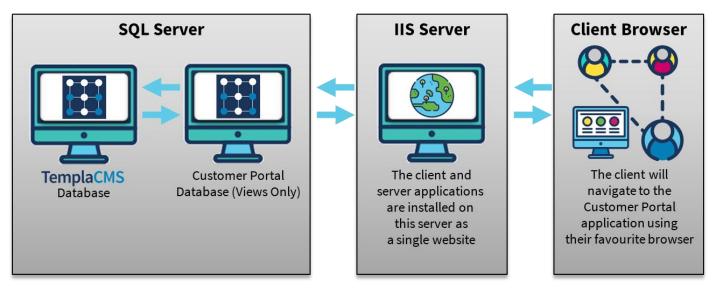
The setting up of a secure connection via HTTPS and port forwarding is the responsibility of the client's IT department or their external IT support company.

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.

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:

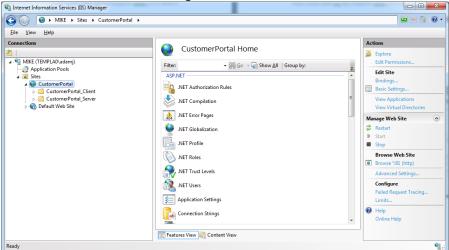
1. Open IIS:

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Ele Yew Help						
Connections	Sites				Actions	
Application Pools	Name					
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	Features View 💐	Content View				

- 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.

Site name:		Application pool:			
CustomerPortal		DefaultAppPool			S <u>e</u> lect
Content Directory					
Physical path:					
C:\inetpub\Custom	nerPortal				
Pass-through authe	entication				
_		_			
<u>C</u> onnect as	Test Settings				
Binding					
<u>T</u> ype:	IP address:			Port:	
				_	
http	 All Unassi 	gned	•	81	
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Host name:		-	•		
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Host name:	toso.com or m	-	•		

4. The screen should look something like this:



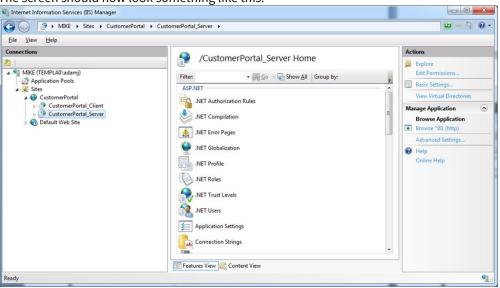
5.

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'

	8
Site name: CustomerPortal	
Path: /	
<u>A</u> lias:	App <u>l</u> ication pool:
CustomerPortal_Client	DefaultAppPool S <u>e</u> lect
Example: sales	
Physical path:	
C:\inetpub\CustomerPortal\Cus	tomerPortal_Client
Pass-through authentication	
Connect as Test Setting	gs

- 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.



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

Web.config - Notepad
Edit Format View Help
m] version="1.0" encoding="utf-8" ?>
nf iguration>
<pre>closs grace applicationSettings" type="System.Configuration.ApplicationSettingsGroup.System. Version=2.0.0.0, Culture=neutral.</pre>
D1cKeyToken=b77a5c561934e089" >
<pre><section name="Temp]aCustomerPortal.Misc.My.MySettings" requirepermission="false" type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0, Culture=neutral,</pre></td></tr><tr><td>11cteyToken=D77a5c561934e089"></section> </pre>
<pre>/configertions></pre>
connectionstrings>
<add <="" name="TemplaCustomerPortal.Misc.My.MySettings.Connectionstring" td=""></add>
connectionString="Data Source=Accessig1\Access;Initial Catalog=Templa-CustomerPortal-Dev;Integrated Security=True;User #stduser:Password#estdpassword;Pooling=Faise:Connect Timeout=10"
providerName="System.Data.SglClient" />
<add <="" name="TemplaCustomerPortal.Misc.Mv.MvSettings.PooledConnectionString" p=""></add>
connectionstring="Data Source=accesssql access; Initial catalog=Templa=CustomerPortal=Dev; Integrated Security=True; User
#stdiser:Password=#stdpassword=Pooling=True=Nas Pool 512e=200;commet Timeout=10"
<pre>c/connectionstrings></pre>
<pre>system.web></pre>
webservices- sprotocols-
<pre><add name="HttpGet"></add></pre>
<add name="HttpPost"></add>
<pre>c/webservices> ccompilation debug="true"/></pre>
<pre>compriation debig= cree // /system.web></pre>
<pre>csystem.diagnostics></pre>
<sources></sources>
This section defines the logging configuration for My.Application.Log <source defaultsvirch"="" name-defaultsource"=""/> >> </td
seners>
<add name="FileLog"></add>
Uncomment the below section to write to the Application Event Log add name"EventLog'- ->
A statements
<pre><switches></switches></pre>
<pre>state fame of a reprice varies and fame of // </pre>
<sharedlisteners></sharedlisteners>
<pre><add <="" name="FileLog" td="" type="Wicrosoft.visualBasic.Logging.FileLogTraceListener, Microsoft.visualBasic, version=8.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a,</pre></td></tr><tr><td>cossorarchitecture.wsti"></add></pre>
initializeData="FileLoowriter"/>
Uncomment the below section and replace APPLICATION_NAME with the name of your application to write to the Application Event Log
add name="EventLog" type="System.Diagnostics.EventLogTraceListener" initializeData="APPLICATION_NAME"/ >
<pre>c/system.diagnostics></pre>
applicationSettings>
<pre>cTemplacustomerPortal.Misc.My.MySettings></pre>
<pre><value>\DEVELOPMENT\competvicescompetvi</value></pre>
<setting name="SemaphorePath" serializeas="String"></setting>
<value>\/DEVELOPMENT/tqmdev/Templa-CM5\SemaphoFe</value>
<value>\/DEVELOPMENT/tgmdev/Templa-CMS/Documents</value>
<pre><setting 'name="ClientPath" serializeds="String"></setting></pre>
<values_: (luscomerportal<="" values<br=""></values_:>

- 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'

Select Users or Groups			2	X
Select this object type:				
Users, Groups, or Built-in security principals		<u>O</u> bjec	t Typ	es
From this location:				
Development		Loc	ation	s
Enter the object names to select (<u>examples</u>):				
IIS AppPool\DefaultAppPool		Chec	k Na	mes
Advanced	ОК		Cano	el

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'.

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

Permissions for Semaphore		×		
Security				
Object name: \\Development\T	QMDEV\Templa-	CMS\Semapho		
Group or user names:				
SCREATOR OWNER		<u> </u>		
& Authenticated Users		E		
DefaultAppPool SYSTEM				
👗 Eddie Dolbear (eddied@temp	la0.net)	*		
Image:				
	A <u>d</u> d	Remove		
Permissions for DefaultAppPool	Allow	Deny		
Full control	V	A 1		
Modify	V			
Read & execute	v			
List folder contents	v			
Read	\checkmark			
Learn about access control and permissions				
ОК	Cancel	Apply		

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.

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File Edit View Tools Window Community Help		
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Object Explorer + 3 ×	A	1
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- 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'.

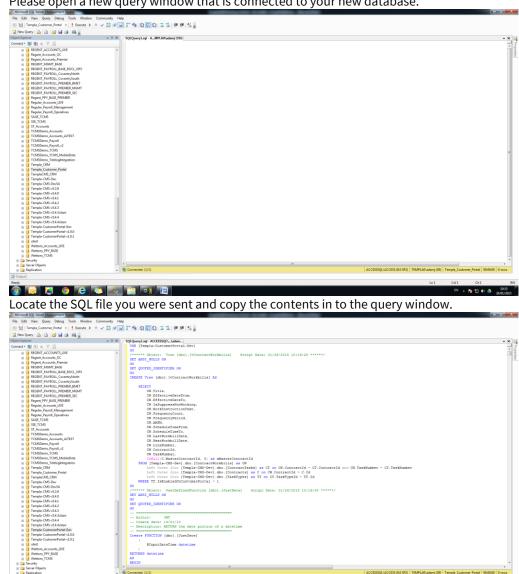
Select a page	Script 👻 🌇 Help						
Pliegroups	Database <u>n</u> ame:		Templa_Cu	Templa_Customer_Portal			
	Qvmer: ">www.com/default>						
	Database files:						
	Logical Name	File Type	Filegroup	Initial Size (MB)	Autogrowth		
	Templa_Cus		PRIMARY	3	By 1 MB, unrestricted growth		
	Templa_Cus	Log	Not Applicable	17	By 10 percent, unrestricted growt		
Connection							
Server: ACCESSSQL\ACCESS							
Connection:							
TEMPLA0\adamj							
TEMPLA0\adami							
Vew connection properties							
	٢	m		Add	Remove		

Your new database should now have been created.

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- 🗄 间 Templa_CRM

5.

- 🗄 间 Templa_Customer_Portal
- 🗄 间 TemplaCMS_CRM
- Please open a new query window that is connected to your new database. 4.



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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'.

Find and Replace
🔜 Quick Find 👻 👫 Quick Replace 👻
Fi <u>n</u> d what:
Templa-CMS-Dev 👻 🕨
Replace with:
Templa-CMS-Database
Look in:
Selection 🔹
+ Find options
Eind Next Replace
Replace <u>A</u> ll

- 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'.

Login Properties - TemplaCM	AS	And a second second second second	
Select a page	Script 👻 📑 Help		
General	Displays H	elp	
🚰 User Mapping	Login name:	TemplaCMS	Search
Securables	Mindows authentication		
	<u> <u> SQL</u> Server authentication </u>		
	Password:	•••••	
	Confirm password:	•••••	
	Specify old password		
	Old password:		
	Enforce password policy		
	Enforce password expira		
	User must change passv	vord at next login	
	 Mapped to certificate 		-
	 Mapped to asymmetric key 		*
Connection	Map to Credential		▼ <u>A</u> dd
Server: ACCESSSQL\ACCESS	Mapped Credentials	Credential Provider	
Connection: TEMPLA0\adamj			
View connection properties			
Progress			Remove
Ready	Default database:	master	•
~45v	Default language:	English	•
		ОК	Cancel

- 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.

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1902 (10049.AD astern) 2 Application Profile	/CustomerPortal_Server Home Rec Blin - Deve At Deve by Ava	· z·			A faire Distance
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	Festure Very Control Very				

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11. Double click the 'Connection Strings' menu option

js	.NET Profile Connection Strings SMTP E-mail	
	Compression Compressin Compressin Compressin Compressin Compressin	
cing Rules	Handler Mappings	
	MIME Types	
	WebDAV Authoring Rules	

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

t Connection Stri	ng l	8
<u>N</u> ame:	TemplaCustomerPortal.Misc.My.MySettings.ConnectionString	
SQL Server		
Server:		
<u>D</u> atabase:		
Credentials		
O Use Wind	ows Integrated Security	
Specify cr	edentials	
	Set	
Custo <u>m</u>		
	ACCESSSQL\ACCESS;Initial Catalog=Templa-CustomerPortal-	
	d Security=False;User assword=#stdpassword;Pooling=False;Connect Timeout=10	
		-
	ОК	Cancel
	UK	cuncer

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.

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

System Control - Customer Portal	
E File Tools Help	
📁 💭 Close 🛃 Save	
Customer Portal Settings Links	Binder Links
Passwords	
Password expiry days	90
Minimum password length	7
Password re-use versions (Max 5)	5
User Guide	
User guide	
Areas	
Clients	✓ Display at logon?
V Sites	☑ Display at logon?
Contracts	☑ Display at logon?
Employees	Display at logon?
Quality Audits	☑ Display at logon?
Service Requests	Display at logon?
Vorkbills	✓ Display at logon?
SystemControl_CustomerPortal	© 2015 Templa Computer Systems Ltd

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

System Control - Customer Portal	A Contract of the	Press of Concession	
File Tools Help			
📁 💭 Close 🛃 Save			
Customer Portal Settings Links Bind	er Links		
Client Registration Defaults			
Enabled?			
	user administration?		
Maximum sub-user logins	0		
Maximum sub-user logins	0		
Accessible Areas			
Clients	Sites	Contracts	Employees
Allow?	Allow?	Allow?	Allow?
General Financial	Financial Contacts	Tasks Employees	General Assignments
Contacts	Equipment	Workbills	Documents
Documents Forms	Forms	Stores	Forms Staff Induction and Training Form
Properties	Site Binder	Documents 🔹	Properties
Quality Audits	Service Requests	Workbills	
Allow?	Allow?	Allow?	
Dashboard and List	Dashboard and List	Dashboard and List Schedule	
Dashboard period	Dashboard period	Dashboard period	
12 Months	3 Months	2 Months -	
		Schedule period	
		3 Months	
SystemControl_CustomerPortal			© 2015 Templa Computer Systems Ltd

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.

SYSTEM CONTROL – LINKS TAB

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

System Control -	Lustomer Portal			
File Tools Help				
📁 💭 Close 🛃 Sav	e			
Customer Portal S				
Description U	-			
]			
Test h	ttp://templacms.co.uk			
Add Re SystemControl_Custor	emove Details nerPortal ≌2015 I empla	Computer Systems		
• Link				
File Tools Help			and the second s	
	ept 🌀 Accept and new 🗘 I	Previous 🖒 Next		
Detail				
Description Test]		
Url http://w	vw.templacms.co.uk/]		
Icons				
Mouse off icon	C:\Users\adamj\Desktop\Custom	erPortal\Client\Buttons\Log	▶	
Mouse on icon	C:\Users\adamj\Desktop\Custom	erPortal\Client\Buttons\Log		
Disabled icon	C:\Users\adamj\Desktop\Custom	erPortal\Client\Buttons\Log	i 🕨	
Requires	Login?			
SystemControl_Custom	erPortal_Links	© 201	4 Templa Computer Syst	tems Lt

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.

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.

System Control - Customer Portal	
File Tools Help	
💋 Close 🛃 Save	
Customer Portal Settings Links Binder Links	
Description	
Insurance Documentation	
Add Remove Details	
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	Systems Ltd
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Binder link File Tools Help Close Accept Accept Accept Accept and new Previous New New Detail Description Insurance Documentation Attachment type SB - Site Binder - Insurance Add Remove Details Icons Mouse off icon	
Binder link File Tools Help Close Accept Accept Accept Accept and new Previous New New Detail Description Insurance Documentation Attachment types Attachment type SB - Site Binder - Insurance Add Remove Details Icons Mouse off icon Mouse off icon	
Binder link File Tools Help Close Accept Ac	Svstems Ltd .::)
Binder link File Tools Help Image: Close Accept Accept Accept and new Previous New New Detail Description Insurance Documentation Attachment types Attachment type Image: SB - Site Binder - Insurance Add Remove Details Icons Mouse off icon Mouse off icon	Svstems Ltd .::)

Description: The description of the attachment.

Control_CustomerPortal_BinderLinks

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

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s Lta

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.

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

System Control - System Setup	
File Tools Help	
💭 Close 🛃 Save	
General Business analysis levels Frequency colours License	
Frequency	
1 Months	
6 Months	
2 Months	
4 Weeks	
3 Weeks	
Add Remove Details	
SystemControl_SystemSetup @2014 Temple Computer Sys	nterns Ltd 🕂

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

Frequency Colour	
File Tools Help	
🕴 📁 Close 🍏 Accept 🍘 Accept and new 🗇 Previous 🛸	Next
Detail	
Frequency Months	
Colour 128, 255, 255 💌	
SystemControl_FrequencyColours © 2014 Templa C	omputer Systems Ltd

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.

Client Registration

TemplaCMS - Contract Management System	em TemplaCMS DEV				
File Window Tools Help					
🥔 Close 🧔 Open 🔍 View 🍣 Refre	sh 🍰 Print 🤌 Excel 🦘 Search	🥜 Clear Search 🐰 Show de	eleted 📲 Expand 😐 Collapse 🎇 Check d	uplicates	Ŧ
😽 Filter selected 🔲 Un-filter selected					
Navigator A	Alerts Client Registrations				
Service Point	Client Registrations				
æ 📲 Customer Service ⊛ 📲 Quality Audits	Drag a column header here to group by th	nat column.			
Client Registrations	团 C Client	Datasource	Login code	Is enabled?	Password expiry date
 Client Registration Review Batches 					
	 **55 - ASAProspect Ltd 	ACCOUNTS - Demo accounts	**55	V	01/07/2014 13:39
	**58 - c	ACCOUNTS - Demo accounts	**58	V	01/07/2014 13:39
	**59 -		→ 59	V	01/07/2014 13:39
	**60 - test	ACCOUNTS - Demo accounts	60	V	01/07/2014 13:39
	**66 - JHT Itd	ACCOUNTS - Demo accounts	**66	v	01/07/2014 13:39
	**67 - Overheads	ACCOUNTS - Demo accounts	~ 67	V	01/07/2014 13:39
	**69 - TEST123	ACCOUNTS - Demo accounts	**69	V	01/07/2014 13:39
	*79 - JHT	ACCOUNTS - Demo accounts	*79	V	01/07/2014 13:39
	AAAA01 - aaaa	ACCOUNTS - Demo accounts	AAAA01	v	01/07/2014 13:39
Contract Admin	ABP001 - New Client Ltd	ACCOUNTS - Demo accounts	ABP001	V	01/07/2014 13:39
Pavroll	ABUD01 - ABU DHABI INVESTMEN	ACCOUNTS - Demo accounts	ABUD01	V	01/07/2014 13:39
Workbills	AMH001 - Aerials Ltd	ACCOUNTS - Demo accounts	AMH001	v	01/07/2014 13:39
Billing	ASD01 - asd	ACCOUNTS - Demo accounts	ASD01	V	01/07/2014 13:39
Fransaction Register	AUD001 - Alan Group Ltd	ACCOUNTS - Demo accounts	AUD001	V	01/07/2014 13:39
Stores	BAN001 - B & H Mould & Tool Comp	ACCOUNTS - Demo accounts	BAN001	v	01/07/2014 13:39
Reports	BEA002 - Small Wonder Computing	ACCOUNTS - Demo accounts	BEA002	V	01/07/2014 13:39
Period/Year End	BIE002 - Bacarel & Co I td	ACCOUNTS - Demo accounts	BIE002	V	01/07/2014 13:39
faintenance	BLO001 - Butler Fuels	ACCOUNTS - Demo accounts	BLO001		01/07/2014 13:39
vstem Admin	BOBSM01 - Bob smith	ACCOUNTS - Demo accounts	BOBSM01	v	01/07/2014 13:39
iession Admin	CBRE21 - C/O CB RICHARD ELLIS	ACCOUNTS - Demo accounts	CBRE21	v	01/07/2014 13:39
2	ClientRegistrationList 119 rows				Templa Computer Systems
2014 Templa Computer Systems Ltd	Cherningiou autorizati 113 1048	AJ			NUM 02/07/2014 13:4

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 Registration -	AMH001 - Aerials Ltd
File Tools Help	
🕴 📁 Close 🛃 Save	🗢 Previous 📫 Next
General Settings Li	inked Clients Sites Sub-users Dates
Client	Aerials Ltd 0 😒
Login code	AMH001
Password	AMH001
Password expiry date	01/07/2014
Password reset email	
	System default?

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.

CLIENT REGISTRATION – SETTINGS

Client Registration - AMH001 - Aerials L	td		
File Tools Help			
📁 📁 Close 🛃 Save 🗇 Previous 🛸	Next		
General Settings Linked Clients Site	s Sub-users Dates		
Enabled?			
Allow sub-user administration?			
Maximum sub-user logins	5		
QA dashboard period 3 Yes	irs 💽		
Accessible Areas			
Clients	Sites	Contracts	
Allow?	Allow?	Allow?	
General Financial	Financial 🔹	Employees 🖌	
Contacts	Equipment	Quality Audits	
Documents Forms	Documents Forms	Stores Documents	
	Site Binder 💌	Forms	
Employees	Quality Audits	Service Requests	
✓ Allow?	Allow?	✓ Allow?	
General	Dashboard and List	Dashboard and List	
Assignments Documents			
Forms Staff Induction and Training Form			
Star induction and Training Form			
Workbills			
Vioricolius			
Dashboard and List			
ClientRegistrationDetail			© 2014 Templa Computer Systems Ltd
		and the second s	, , , , , , , , , , , , , , , , , , ,

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.

Client	Registration	n - AMH001 - Ae	rials Ltd							x
E File To	ols Help									
i 💋 Clo	se 🛃 Sav	e 💠 Previous	🗢 Ne	ext						
General	Settings	Linked Clients	Sites	Sub-users	Dates					
Client										
JONES0	1 - Jones Ltd									

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.

CLIENT REGISTRATION – SITES

💋 Close 🛃 Save 💠 Previous 👄 Ne			
General Settings Linked Clients Sites Drag a column header here to group by that			
	Client	Assigned users	Exclude?
Site			
MH001/1 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/2 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/5 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/6 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/7 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/8 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/9 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/12 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/13 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/14 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/15 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	

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

Client Registra	tion - AMH001 - Ae	rials Ltd	-	-	-	-					
File Tools He	p										
📁 💋 Close 🛃	Save 💠 Previous	🌩 Ne	ct								
General Setting	s Linked Clients	Sites	Sub-users	Dates							
Drag a column h	eader here to group	p by that	column.								
E Login code	Enabled?										
▶ Test								 			
Add	Remove Det	ails									
ClientRegistrationL	letail							Ø	014 Templa	Computer	Systems Ltd

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.

Client registration s	ub-user - AMH001 - Aerials Ltd	
EFile Tools Help		
🕴 📁 Close 🍏 Accep	pt 🍓 Accept and new 💠 Previous 🔿 Next	
Sub-user Sites		
Login code	Test	
Password	abc123	
Password reset email	test@templa.com	
	✓ Enabled?	
ClientRegistrationSubUs	erDetail ©2014 Templa Comput	ter Systems Ltd

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.

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

💭 Close 🍯 Accept 🌀 Accept	tand new 🗢 Previous 📫 Next		
Sub-user Sites			
Drag a column header here to group	by that column.		
Site	Client	Assigned users	Restricted?
AMH001/1 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/2 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/5 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/6 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/7 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/8 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/9 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/12 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/13 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
AMH001/14 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	
MH001/15 - Aerials Ltd	AMH001 - Aerials Ltd	Not assigned	

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.

Client Registration	n Review Batch - (new)	
File Tools Help		
🕴 💋 Close 🛃 Sav	e 🗘 Notes	
General Settings		
Batch number	new batch	
Description		
Extraction		
General Clients		
Datasource		Ø
	☑ Include unregistered clients?	
ClientRegistrationRevi	ewBatchDetail	© 2015 Templa Computer Systems Ltd
-		

When saved, this jobs runs in the background:



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

Client Registration Review Batch - TEST	Access Table 1	
File Tools Help		
😥 Close 🛃 Save 🗇 Previous 🔿	Next ≶ Notes	
🖸 Delete 🍘 Post		
General Settings Review items		
Client Registration Defaults		
Enabled?		
Allow sub-	user administration?	
Maximum sub-user logins	0	
Accessible Areas		
Clients	Sites	Contracts Em
Allow?	Allow?	Allow?
General Financial	General A	General Ge Tasks As:
Contacts	Contacts =	Employees E Do
Documents Forms	Equipment Documents	Workbills For Quality Audits Sta
	Forms	Stores
Quality Audits	Service Requests	Workbills
Allow?	Allow?	Allow?
Dashboard and List	Dashboard and List	Dashboard and List Schedule
		Janeane
l I		
Dashboard period	Dashboard period	Dashboard period
0	0	0 -
		Schedule period
ClientRegistrationReviewBatchDetail		© 2015 Templa Computer Systems Ltd

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

Task Type Details - (new)	
; File Tools Help	
📁 💭 Close 📕 Save 😸 Save and new	
General Dates	
Code	
Description	
Requires timesheet	
Enabled on customer portal?	
Task TypeDelail © 2014 Templa Computer System	ns Ltd

WORKBILL TYPES

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

Workbill Type Det	ails - Standard
E File Tools Help	
🕴 🥥 Close 🛃 Sav	e 🛃 Save and new 🗢 Previous 📫 Next
General Dates	
Code	Standard
Description	Standard
	Enabled for customer portal?
WorkbillTypeDetail	© 2015 Templa Computer Systems Ltd

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:

Attachment Type	Attachment Type Details - Staff training							
EFile Tools Help	File Tools Help							
🕴 💋 Close 🛃 Sav	ve 🛃 Save and new 🗢 Previous 👄 Next							
General Permissio	ons Dates							
Code	SI							
Description	Staff training							
Area	Training form							
Site binder details	Allow add to site binder?							
	Enabled on customer portal?							

PROPERTY TYPES

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

Propert	y Type Detail	s - (new)				_	
EFile Tool	s Help						
🕴 🥥 Close	🚽 🛃 Save 🖡	Save and new					
General	Valid entries	Permissions	Dates				
Code	Ι						
Descriptio	n 🗌						
Area	(sel	ect one) 📃 💌					
Data type	(Se	lect one) 📃 💌					
Sequence							
		Mandatory entry					
		Enable on custor	ner portal?				

QA TEMPLATE TYPES

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

QA Template Type - Star	dard	
E File Tools Help		
🕴 💋 Close 🛃 Save 🗇	Previous 幹 Next	
General Dates		
Code	STD	
Description	Standard	
Completion workflow path		Ø
	Enabled for customer portal?	
QATemplateTypeDetail		© 2015 Templa Computer Systems Ltd

SR TYPES

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

SR Type - (new)			
File Tools Help			
📁 💭 Close 🚼 Sav	e 🚦 Save and new		
General Ageing	Dates		
Code	COMPLAINT		
Description	COMPLAINT		
SR group	Administration		<i>∞</i> ()
Priority	1		Ø
Initiation AR list			Ø
Closure AR list			Ø
	Force closure notes?		
	Enable on customer portal?		
SATypeDetail		© 2014 Templa	Computer Systems Ltd

CONTACT TYPES

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

Contact Type De	tails - TemplaCMS		_		\times
File Tools Help					
😳 Close 🛃 Save 🗇 Previous 🔿 Next					
General Permissions Dates					
Code	TemplaCMS				
Description	TemplaCMS				
	Display on mobile?				
ContactTypeDetail		© 2017 Temp	la Compu	ter Systen	ns Ltd



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