

# Customer Portal Set Up / Configuration TEMPLACMS MANUAL - EXTERNAL

Version: 10 (CMS6.1.0)



# **COMMERCIAL STATEMENT**

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

# TABLE OF CONTENTS

INTRODUCTION	4
SCHEMATIC	4
TECHNICAL REQUIRMENTS	4
Server	
Client	5
IIS	
Configuration	5
Configuration	8
SQL SERVER CONFIGURATION	8
CUSTOMER PORTAL CUSTOMISATION	2

# 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.

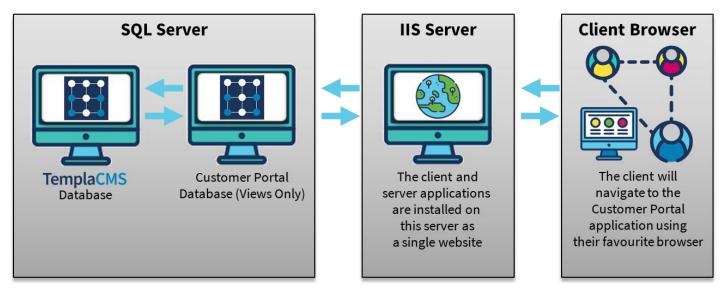
The setting up of a secure connection via HTTPS and port forwarding is the responsibility of the client's IT department or their external IT support company.

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.

User's browsers will need to allow 'JavaScript' (most browsers are set to ON by default), for the application to function.

## 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.

1. Open IIS:

Enternet Information Services (IIS) Manager		· Interes			last .	
G 🕢 📓 → MIKE → Sites →						 🖬 🛛 🟠 🔞 -
<u>File View H</u> elp						
Connections	🖣 Sites					Actions
2	Jones					💣 Add Web Site
MIKE (TEMPLAD\adamj)     Gata Application Pools	Filter:	- 🙌 <u>G</u> o	- 🕁 Show <u>A</u>	II Group by: No Grouping 🔹 🔹		Set Web Site Defaults
Appreciation Pools	Name	ID	Status	Binding	Path	Help
🕞 <table-cell> Default Web Site</table-cell>	G Default Web Site	1	Started (ht	"50 (http),508:" (net.tcp)," (net.pi	%SystemDrive%\inetpub\www.root	Online Help

- 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       Select         Content Directory       Physical path:          C:\inetpub\CustomerPortal        Pass-through authentication         Connect as       Test Settings         Binding       Ip address:       Port:         http       All Unassigned       81         Host name:       Example: www.contoso.com or marketing.contoso.com	Add Web Site			? ×
Content Directory  Physical path: C:\inetpub\CustomerPortal  Pass-through authentication  Connect as  Test Settings  Binding  Type: IP address: Port: http All Unassigned  Maine:	-			
Physical path:         C:\inetpub\CustomerPortal         Pass-through authentication         Gonnect as         Test Settings         Binding         Type:       IP address:         Port:         http       All Unassigned         Host name:	CustomerPortal	DefaultAppPool		S <u>e</u> lect
C:\inetpub\CustomerPortal Pass-through authentication <u>Connect as</u> Test Settings Binding Type: IP address: Port: http All Unassigned 81 Host name:	Content Directory			
C:\inetpub\CustomerPortal Pass-through authentication <u>Connect as</u> Test Settings Binding Type: IP address: Port: http All Unassigned 81 Host name:	Physical path:			
Gonnect as       Test Settings         Binding       Image: IP address: Port:         http       ▲ All Unassigned ▲ 81         Host name:       Image:				
Gonnect as       Test Settings         Binding       Image: IP address: Port:         http       ▲ All Unassigned ▲ 81         Host name:       Image:	Pass-through authentication			
Binding Type: IP address: Port: http  All Unassigned Bl Host name:				
Ipe:     IP address:     Port:       http     All Unassigned     81       Host name:     Image:     Image:	Connect as Test Settings			
Ipe:     IP address:     Port:       http     All Unassigned     81       Host name:     Image:     Image:				
All Unassigned     •     81	Binding			
Host name:	<u>T</u> ype: <u>I</u> P address	:	P <u>o</u> r	t:
	http 🔻 All Unassi	gned	- 81	
	Heat assure			
Example: www.contoso.com or marketing.contoso.com	<u>H</u> ost name.			
Example: www.contoso.com or marketing.contoso.com				
	Example: www.contoso.com or m	narketing.contoso.com		
Start Web site immediately	Start Web site immediately			
OK Cancel			ОК	Cancel
			0	

4. The screen should look something like this.

📬 Internet Information Services (IIS) Manager			
G S MIKE > Sites > CustomerPortal	•	-	📴 🖂 🟠 🔞 •
<u>F</u> ile <u>V</u> iew <u>H</u> elp			
Connections	CustomerPorta	∯ <u>Go</u> - v Show <u>A</u> ll   Group by:	tions Explore Edit Permissions Edit Permissions Edit Site Bindings Basic Settings View Applications View Virtual Directories nage Web Site Storp Browse #31 (htp) Advanced Settings Endigure Failed Request Tracing Limiss Help Online Help
Ready			S.

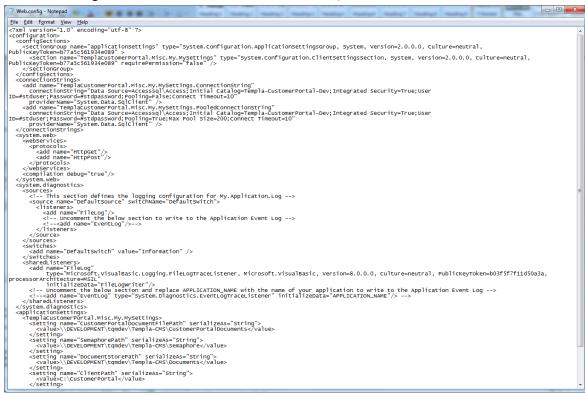
5. IIS will now need to be configured to serve the client and server applications. First select the folder in IIS under the CustomerPortal folder 'CustomerPortal\_Client' right click and select 'Convert to Application'

Add Application	? ×
Site name: CustomerPortal Path: /	
<u>A</u> lias:	App <u>l</u> ication pool:
CustomerPortal_Client	DefaultAppPool Select
Example: sales	
<u>P</u> hysical path:	
C:\inetpub\CustomerPortal\Custon	nerPortal_Client
Pass-through authentication	
<u>C</u> onnect as Test Settings	
	OK Cancel

- 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.

Vi Internet Information Services (IIS) Manager		
G S MIKE > Sites > CustomerPortal > Cus	tomerPortal_Server >	🖸 🖬 🕼 🗸 🕶
<u>F</u> ile <u>V</u> iew <u>H</u> elp		
Connections	/CustomerPortal_Server Home         Filter:          •          •          •	Actions Explore Edit Permissions Basic Settings View Virtual Directories Manage Application Browse Application Prowse *81 (http) Advanced Settings Help Online Help
Ready		¶.:

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 (Note 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'

Select Users or Groups	5 ×
Select this object type:	
Users, Groups, or Built-in security principals	Object Types
From this location:	
Development	Locations
Enter the object names to select ( <u>examples</u> ):	
IIS AppPool\DefaultAppPool	Check Names
Advanced	OK Cancel

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			x
Security			
Object name: \\Development\T(	QMDEV\Templa-C	MS\Semaph	o
Group or user names:			
& CREATOR OWNER			
& Authenticated Users			
👗 DefaultAppPool		=	
& SYSTEM			
🔏 Eddie Dolbear (eddied@templa	a0.net)	-	-
		•	
[	A <u>d</u> d	<u>R</u> emove	
Permissions for DefaultAppPool	Allow	Deny	
Full control	<b>V</b>		•
Modify	<b>V</b>		
Read & execute	<b>v</b>		
List folder contents	<b>V</b>		
Read	<b>v</b>		-
Leam about access control and per	missions		
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.

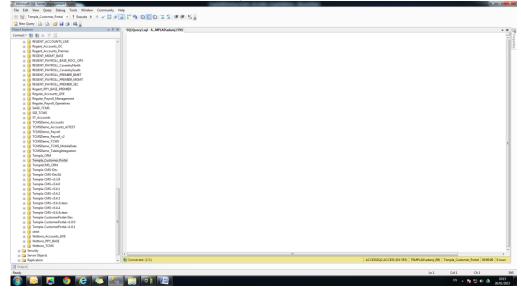
Microsoft SQL Server Management Studio	- di X.
File Edit View Tools Window Community Help	
🔔 New Query 👔 😭 🗃 🗃 🎯 🙀	
Object Explorer - 3 ×	
Connect. 3 1 1 7 5	
	Image: Control to lower         Image: Control to lower
🚳 💽 🧧 🧿 🔁 💌	

- 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'.

🔒 New Database							- • ×
Select a page	Script 🝷 🚺	Help					
Prilegroups	Database <u>n</u> ame:						
	Owner:			<default></default>			
	Use full-text in	dexing					
	Database <u>fi</u> les:						
	Logical Name	File Type	Fileg	roup	Initial Size (MB)	Autogrowth	
	Templa_Cus	Rows	PRI	MARY	3	By 1 MB, unre	estricted growth
	Templa_Cus	Log	Not	Applicable	17	By 10 percent	t, unrestricted growt
Connection							
Server:							
ACCESSSQL\ACCESS							
Connection: TEMPLA0\adamj							
View connection properties							
Progress							
Ready	•	III			Add		► <u>R</u> emove
						ОК	Cancel

Your new database should now have been created.

- 🖭 👩 теморенно\_тенеюдинерганон
- 🗄 🧻 Templa\_CRM
- 🗄 间 Templa\_Customer\_Portal
- 🗄 🧻 TemplaCMS\_CRM
- 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.

	< ほう目 [14] の間の [12] 非常 4.	
nw Query 🔄 🗋 🚔 🛃 🖽 🧝		
Explorer	+ 3 X SQLQueryLsql - MCCESSSQL'\adam	
4* 野田 = 平 近		
Image: Section 2016         Section 2016           Image: Section 2016         Section 2016         Section 2016           Image: Section 2016         Section 2016         Section 2016         Section 2016           Image: Section 2016         Section 2016         Section 2016         Section 2016         Section 2016           Image: Section 2016         Section 2016 <thsection 2016<="" th="">         Section 2016</thsection>	<pre>Mil [regis]-distinguistics::</pre>	
Wettons_TCMS	23 BOIN	
Security Server Objects		
Replication	Si Connected (1/1)     ACCESSIGUACCESS 00 992   TMMPLA0.edumi (8)     Temple Cost	tomer Postal 000000 0 -
Replication A	Accession (21)     Accessio	somer Pours   opposed   a s

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	
B Quick Find ▼ A Quick Replace ▼	
Fi <u>n</u> d what:	
Templa-CMS-Dev 👻	
Replace with:	
Templa-CMS-Database 🔹	
Look in:	
Selection	•
+ Find options	
Eind Next <u>R</u> eplace	
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 - TemplaCN	IS		
Cogin Properties - TemplaCN Select a page     General     Sarver Roles     User Mapping     Server Roles     Status	IS Soript ▼ IB Heb Displays H Login game: Windows authentication © SQL Server authentication Password: Confirm password: Specify old password Qid password: Erforce password policy Erforce password policy	ep   [fembledMS	Sgarch
Connection	User must change passw     Mapped to certificate     Mapped to asymmetric key     Map to Credential	rord at next login	Add
Server: ACCESSSQL/ACCESS Connection: TEMPLA0/adamj	Mapped Credentials	Credential Provider	
Progress Ready	Default <u>d</u> atabase: Default language:	master   English	Remove
		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.

View Help					
ections					Actions
	/CustomerPortal_Server Home				2 Explore
MIKE (TEMPLAI/Ladamp)	Filter • 🗰 tio - 🖓 Show All   Group byt	Ana · 🖾 ·			Edit Parminiana.
Application Pools	ASPINET				Bacc Settings
. 😔 Default Web Site	NET Authorization Rules 🕹 NET Compilation	n NET Error Pages	NET Globalization	MIT Profile	View Virtual Directory
CustomerPortal_Client			-5-		Manage Application
CustomerPortal Server	NET Roles 😥 NET Trust Level		Application Settings	Connection Strings	Browse Application
TemplaCMSMobile	Machine Key Pages and Cont	rols Providers	Session State	SMTP E-mail	Browse "i80 (http)
	E			Links	Advanced Settings
	😹 ASP 🛃 Authentication	Authorization Rules	COT CO	Compression	Hutp     Online Help
	Default Document Directory Brows			Handler Mappings	
			Failed Request Tracing Rules		
	HTTP Redirect HTTP Response	Headers Restrictions	Logging	MME Types	
	Medules 🙀 Dutput Caching	Request Filtering	SSI. Settings	WebDAV Authoring Rules	
	Menapement				
	Configuration Editor				
	Features View 40% Content View				

11. Double click the 'Connection Strings' menu option

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

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

Edit Connection String	2	x
Name:         TemplaCustomerPortal.Misc.My.MySettings.ConnectionString           SQL Server         SQL Server		
Server:		
Credentials		
<ul> <li>Use <u>Windows Integrated Security</u></li> <li>Specify credentials</li> <li>Set</li> </ul>		
<ul> <li>Custom</li> <li>Data Source=ACCESSSQL\ACCESS;Initial Catalog=Templa-CustomerPortal- Dev;Integrated Security=False;User ID=#stduser;Password=#stdpassword;Pooling=False;Connect Timeout=10</li> </ul>	÷	
ОК	Cance	I

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 three /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 three /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.



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.