

Customer Portal Set Up / Configuration

TEMPLACMS MANUAL - EXTERNAL

Version: 10 (CMS6.1.0)



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.

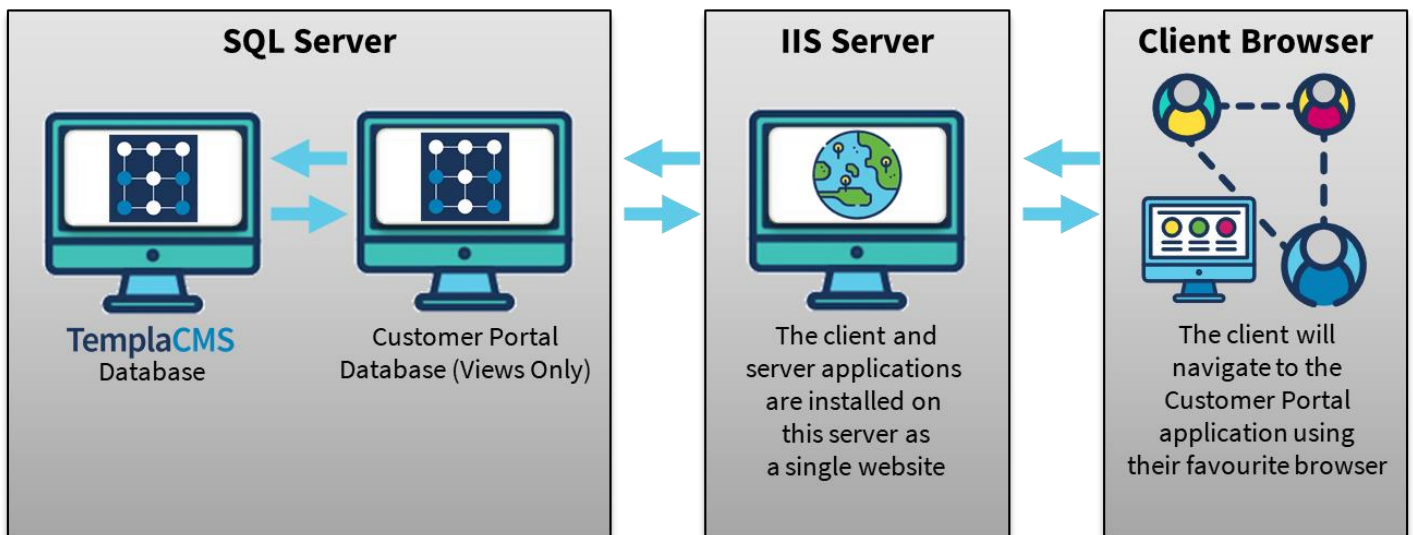
The setting up of a secure connection via HTTPS and port forwarding is the responsibility of the client's IT department or their external IT support company.

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.

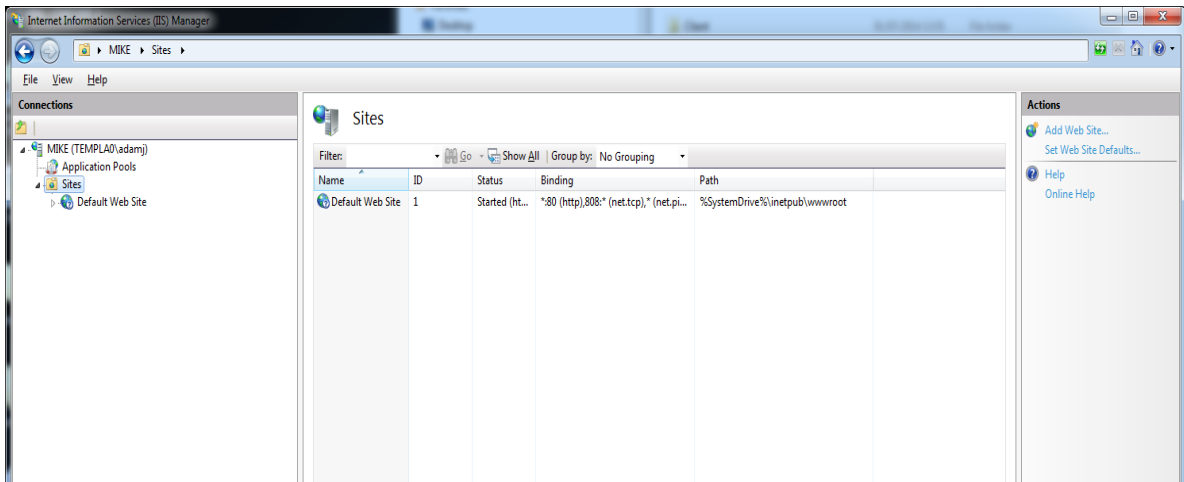
User's browsers will need to allow 'JavaScript' (most browsers are set to ON by default), for the application to function.

IIS

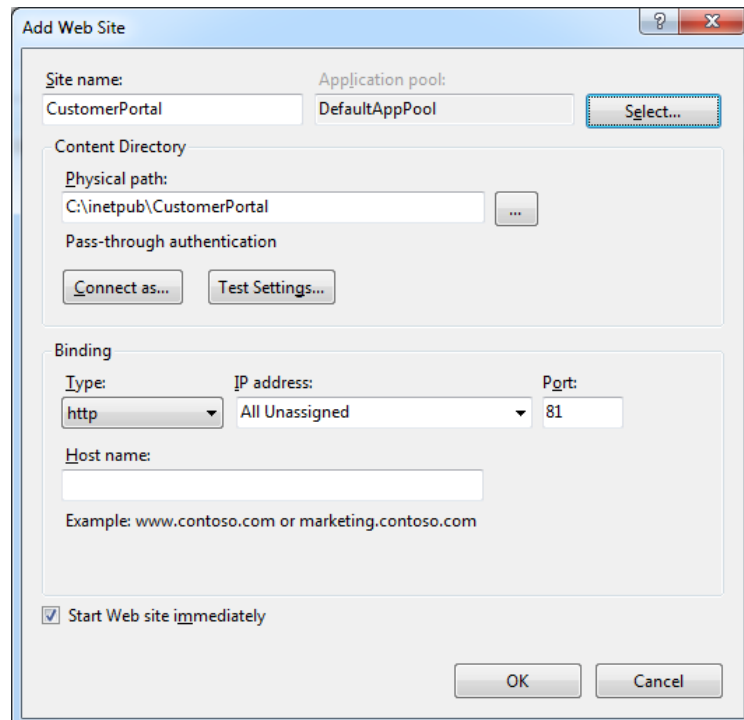
Configuration

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.

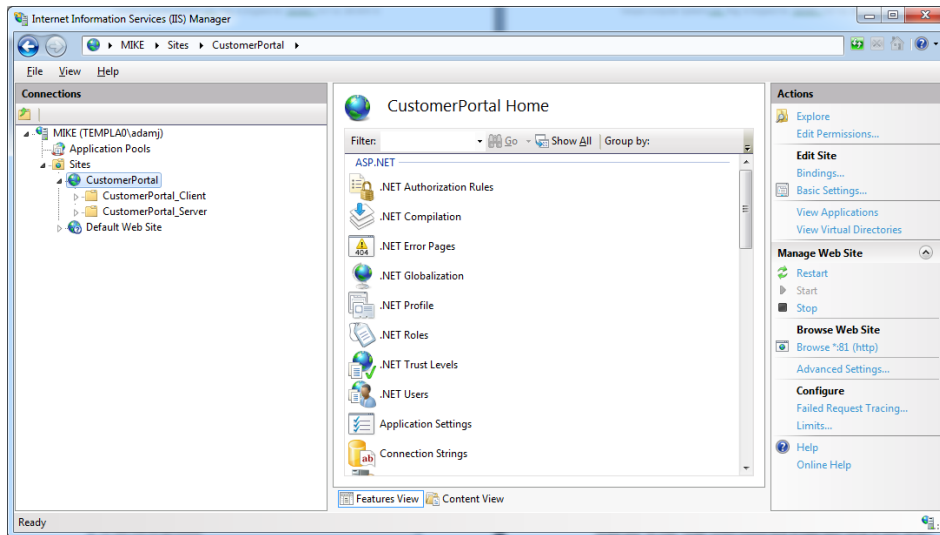
1. Open IIS:



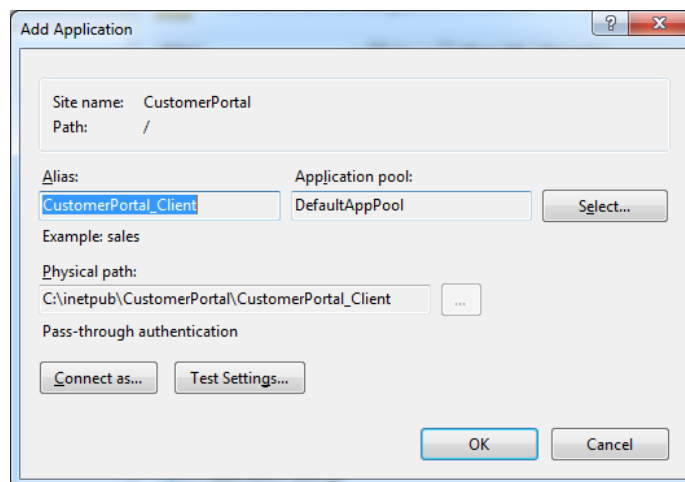
2. Right click the 'Sites' folder and click 'Add Web Site'
3. The form will need to be filled in as below (**please note, you will need to seek advice from your IT department or IT provider what port number to use, 81 has been used for demonstration purposes**) if the 'Customer Portal' folder has been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



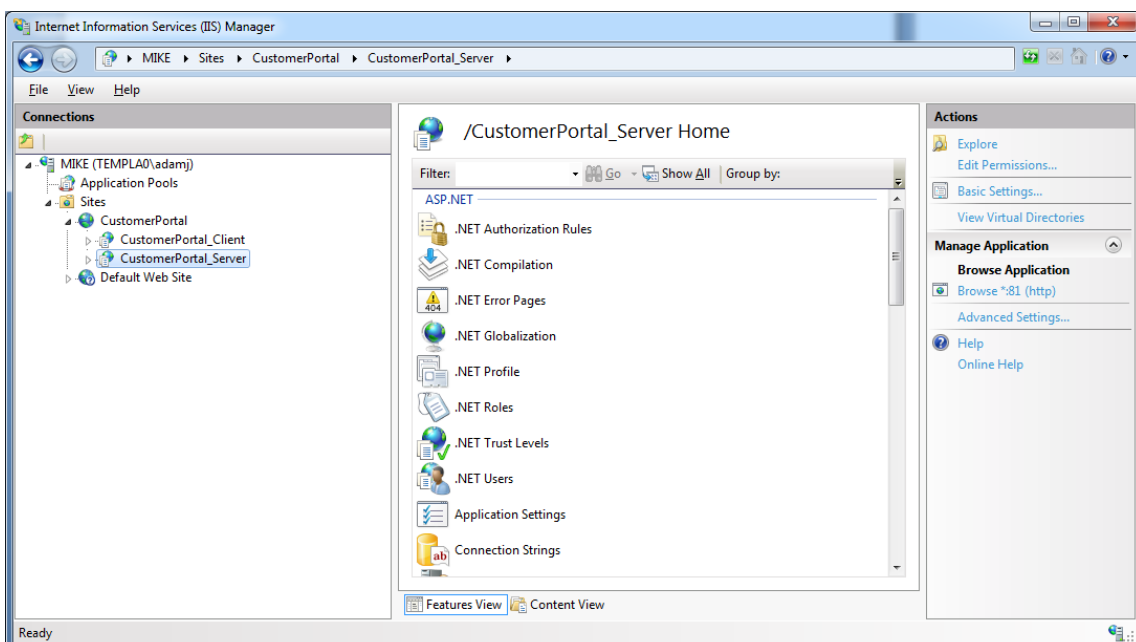
4. The screen should look something like this.



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.

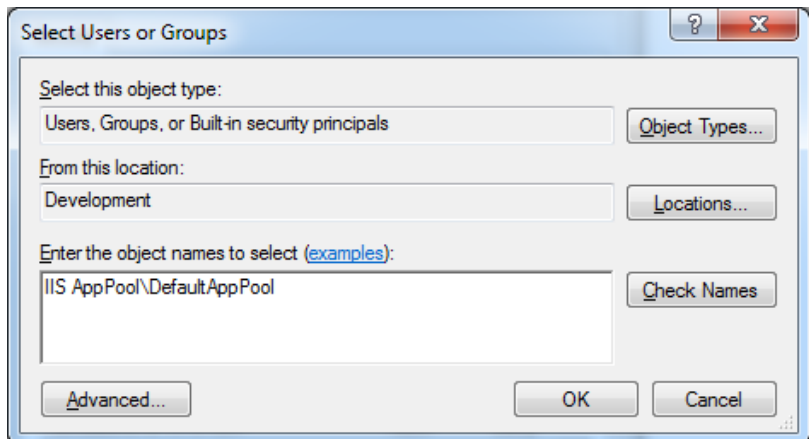


9. The configuration file will now need to be edited. This contains some settings such as the database connection string. The configuration file should be located in: C:\inetpub\CustomerPortal\CustomerPortal_Server\Web.config (Note if the CustomerPortal folder was copied somewhere different to what is detailed in this document please locate the web.config file in the CustomerPortal_Server folder)

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <sectionGroup name="applicationSettings" type="System.Configuration.ApplicationSettingsGroup, System, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" />
    <section name="TempLaCustomerPortal.Misc.My.Settings" type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false" />
  </configSections>
  <connectionStrings>
    <add name="TempLaCustomerPortal.Misc.My.Settings.ConnectionString"
      connectionString="Data Source=AccessSql\Access;Initial Catalog=TempLa-CustomerPortal-Dev;Integrated Security=True;User ID=#stduser;Password=#stdpssword;Pooling=False;Connect Timeout=10
      providerName="System.Data.SqlClient" />
    <add name="TempLaCustomerPortal.Misc.My.Settings.PooledConnectionString"
      connectionString="Data Source=AccessSql\Access;Initial Catalog=TempLa-CustomerPortal-Dev;Integrated Security=True;User ID=#stduser;Password=#stdpssword;Pooling=True;Max Pool Size=200;Connect Timeout=10
      providerName="System.Data.SqlClient" />
  </connectionStrings>
  <system.web>
    <webServices>
      <protocols>
        <add name="HttpGet" />
        <add name="HttpPost" />
      </protocols>
    </webServices>
    <compilation debug="true" />
  </system.web>
  <system.diagnostics>
    <sources>
      <!-- This section defines the logging configuration for My.Application.Log -->
      <source name="DefaultSource" switchName="DefaultSwitch">
        <listeners>
          <add name="FileLog" />
          <!-- Uncomment the below section to write to the Application Event Log -->
          <!--add name="EventLog" /-->
        </listeners>
      </source>
    </sources>
    <switches>
      <add name="DefaultSwitch" value="Information" />
    </switches>
    <sharedListeners>
      <add name="FileLog"
        type="Microsoft.VisualBasic.Logging.FileLogTraceListener, Microsoft.VisualBasic, Version=8.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a, processorArchitecture=MSIL"
        initializedata="FileLogWriter" />
      <!-- 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" /-->
    </sharedListeners>
  </system.diagnostics>
  <applicationSettings>
    <TempLaCustomerPortal.Misc.My.Settings>
      <setting name="CustomerPortalDocumentFilePath" serializeAs="String">
        <value>\\DEVELOPMENT\Tqndev\TempLa-CMS\CustomerPortalDocuments</value>
      </setting>
      <setting name="SemaphorePath" serializeAs="String">
        <value>\\DEVELOPMENT\Tqndev\TempLa-CMS\Semaphore</value>
      </setting>
      <setting name="DocumentStorePath" serializeAs="String">
        <value>\\DEVELOPMENT\Tqndev\TempLa-CMS\Documents</value>
      </setting>
      <setting name="ClientPath" serializeAs="String">
        <value>C:\CustomerPortal</value>
      </setting>
    </TempLaCustomerPortal.Misc.My.Settings>
  </applicationSettings>
</configuration>
```

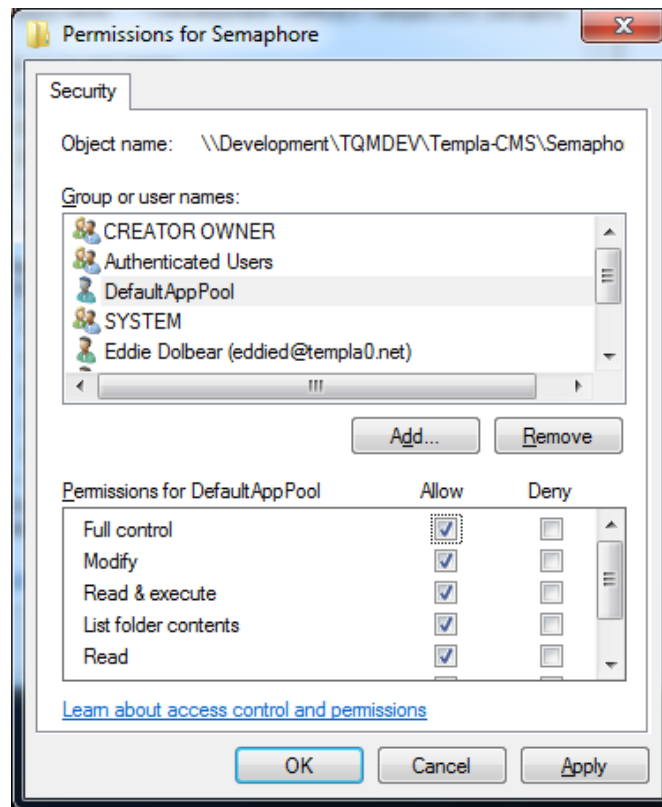
10. In this file please locate the connection strings, adjust this according to your server and database name. Adjust the settings at the bottom of the configuration file:
- **CustomerPortalDocumentFilePath:** This is the path where the Customer Portal documents are to be placed; we don't recommend that 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'.

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



To complete please click '**Apply**'

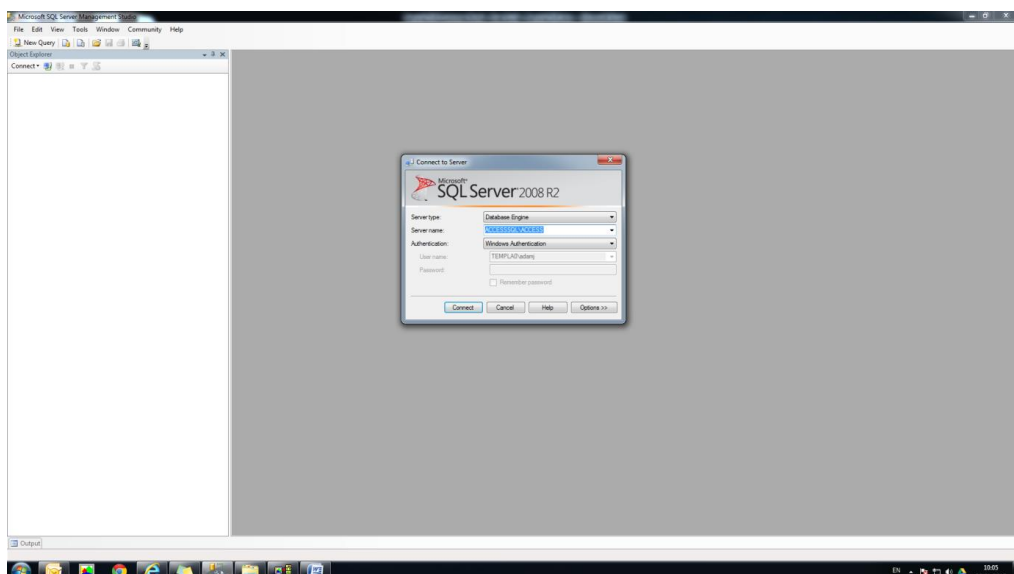
IIS user

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

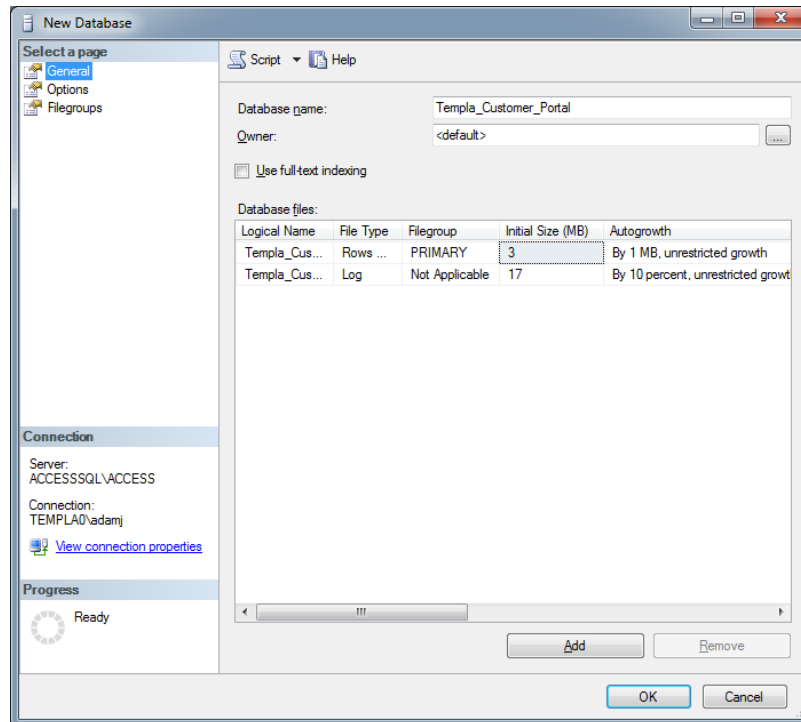
SQL SERVER CONFIGURATION

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.

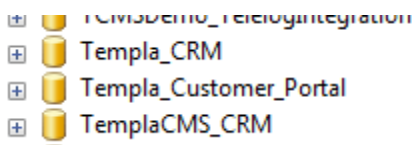
1. Please open your SQL server management server and connect to the instance where you would like this database to reside, we recommend you install the Customer Portal database on the same instance as your TemplaCMS database.



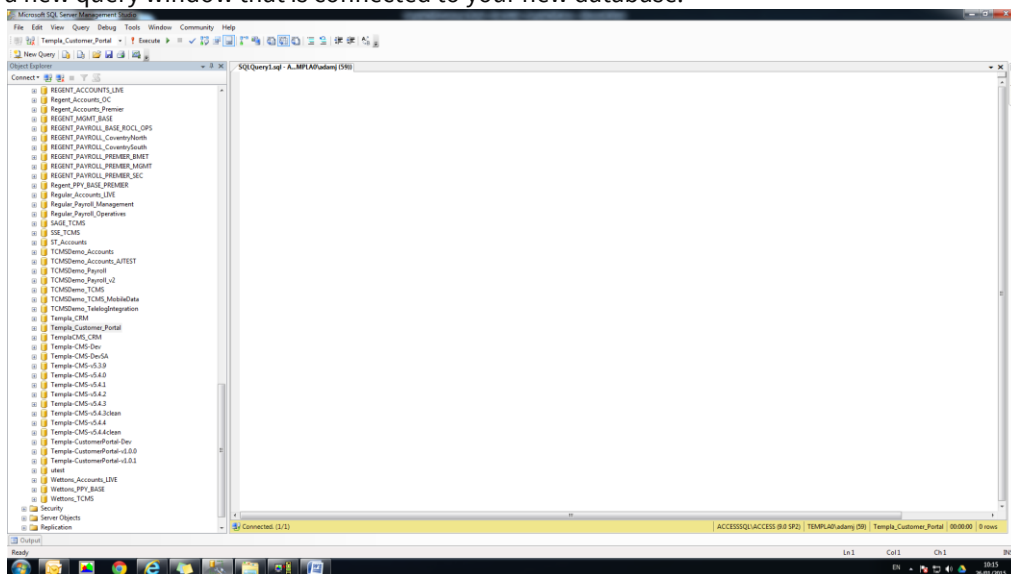
- Once you have connected, please right click on the 'Databases' folder and click 'New Database'.
- Then enter the database name and click 'OK'.



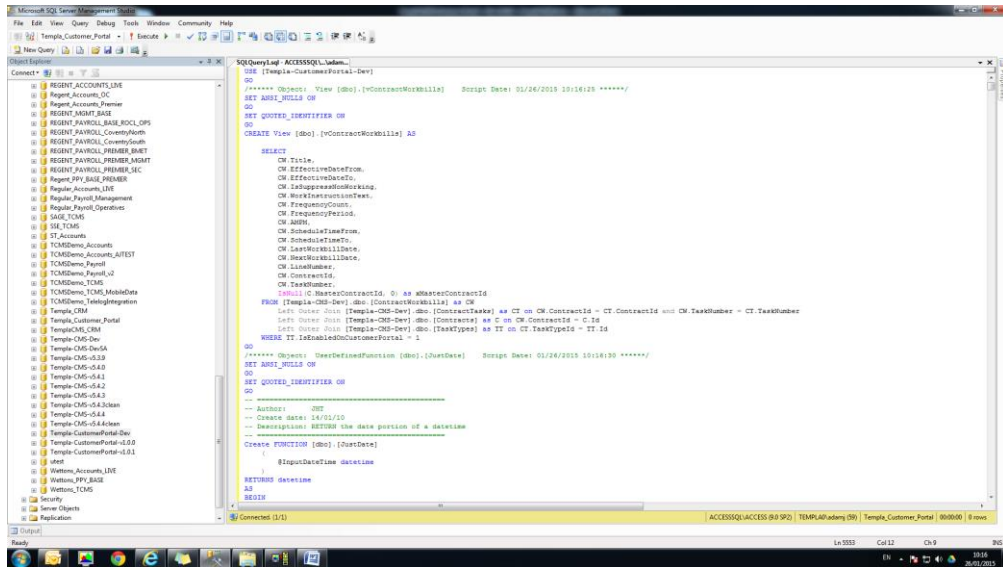
Your new database should now have been created.



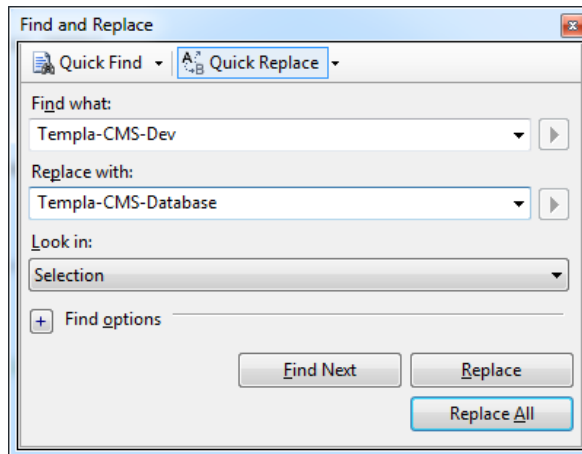
- Please open a new query window that is connected to your new database.



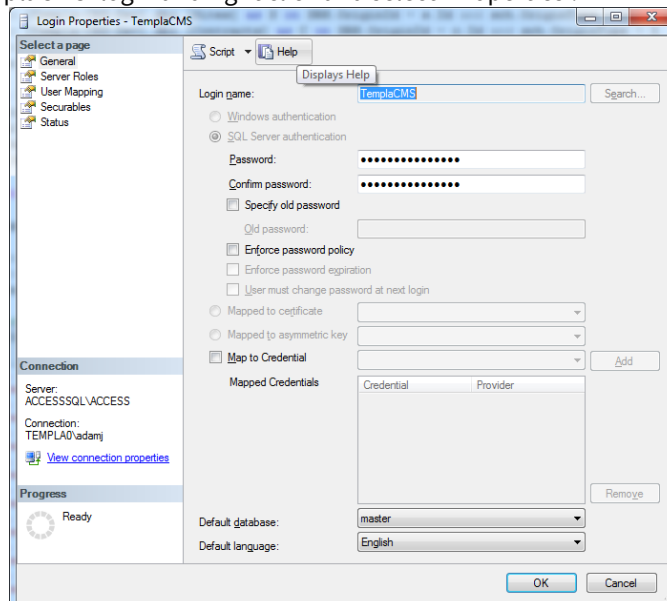
- Locate the SQL file you were sent and copy the contents in to the query window.



- 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'.

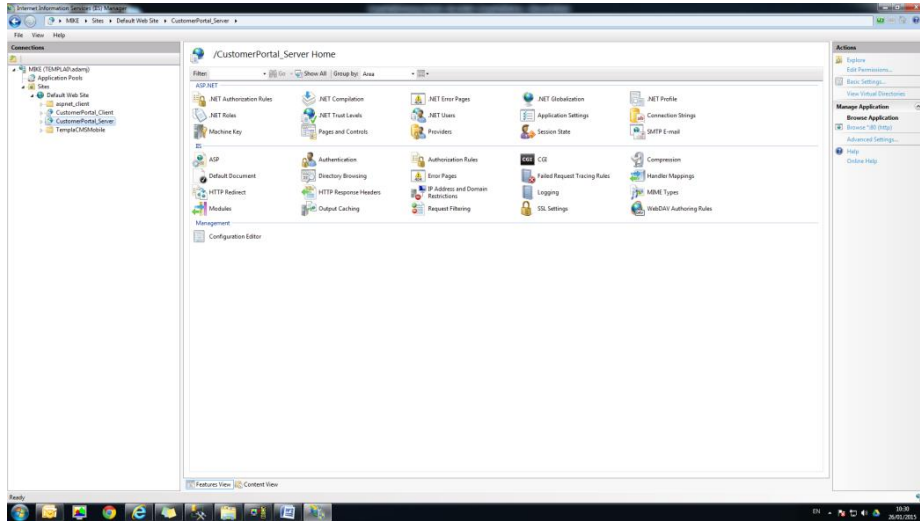


- Then press F5 to execute the script.
- You have one security setting you must set, please expand the 'Security' folder and locate and expand the 'Logins' folder, then locate the 'TemplaCMS' login and right click and select 'Properties'.

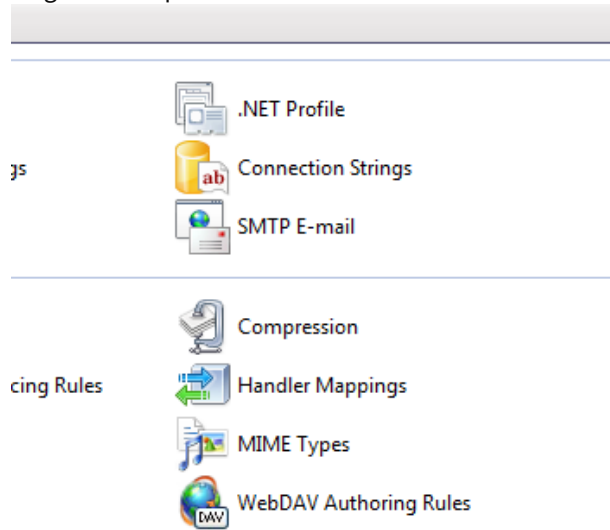


- On the left hand navigator on the properties screen please locate and click 'User Mapping', In the list please locate your new Customer Portal database and click the 'Map' check box, the on then in the database role grid please also make sure the 'db_owner' check box is checked, then click 'OK'. Your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

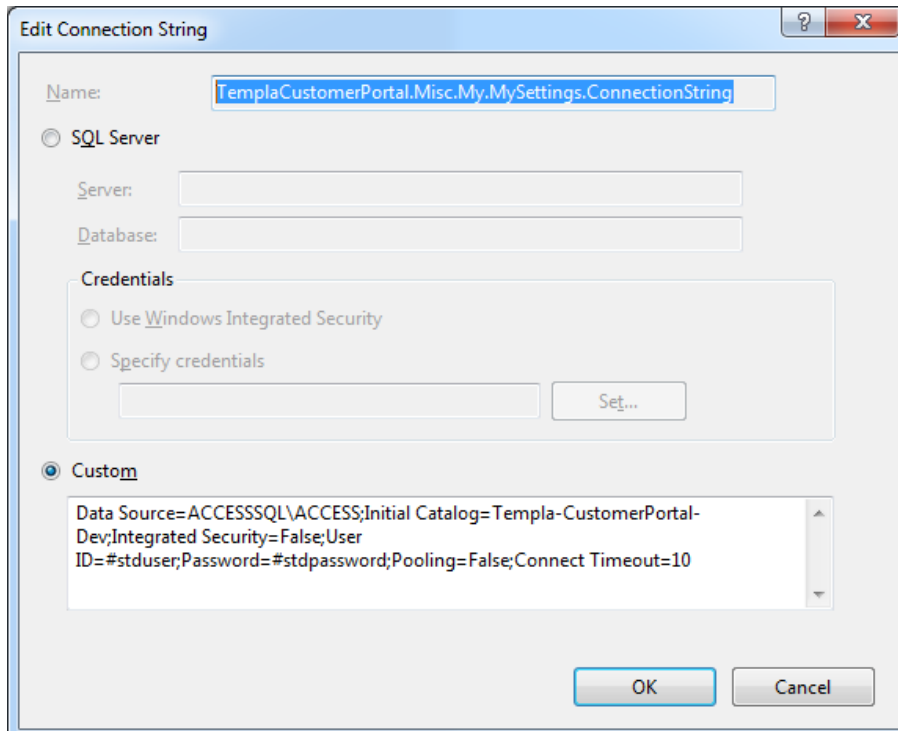
10. Please open IIS and locate your CustomerPortal_Server application.



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.

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.css** & **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.



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