# 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.

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# INTRODUCTION

The TemplaCMS Customer Portal system is a two-part application comprising 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.
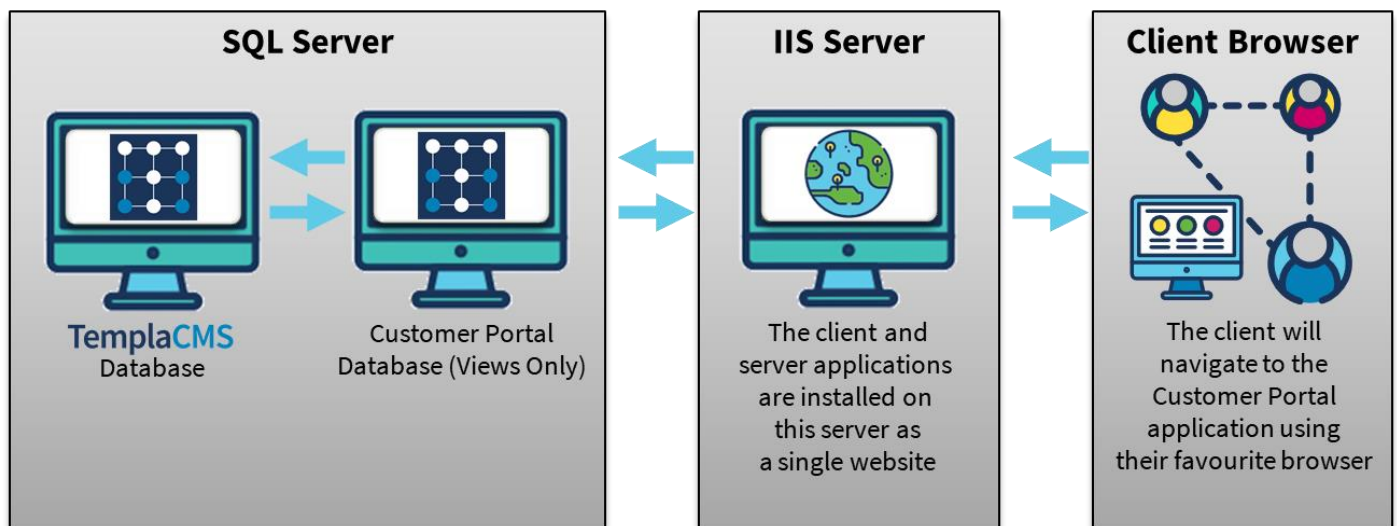
> **The setting up of a secure connection via HTTPS and port forwarding is the responsibility of the client's IT department or their external IT support company.**

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 an SSL certificate is installed on the server.

# SCHEMATIC



**SQL Server**

TemplaCMS Database

Customer Portal Database (Views Only)

**IIS Server**

The client and server applications are installed on this server as a single website

**Client Browser**

The client will navigate to the Customer Portal application using their favourite browser

# TECHNICAL REQUIREMENTS

## Server

Microsoft IIS must be installed on at least one server. IIS will host both the client and server applications. We recommend Microsoft IIS Version 7, however, Microsoft Version 6 can be used.

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 need to ensure that 'JavaScript' is enabled for the application to function. Most browsers are set to ON by default.
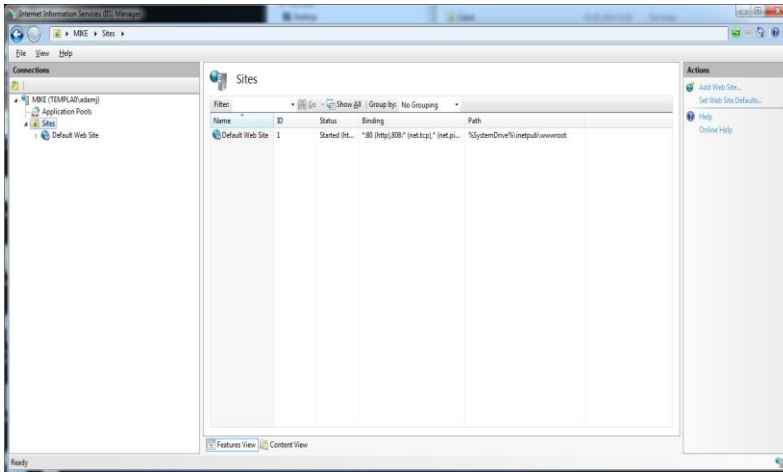
# IIS

## Configuration

A folder containing both the Server and Client applications will have been sent to you. Please move this folder to the 'inetpub' folder normally installed on the **C drive**.

The next step is to set-up IIS to serve the TemplaCMS Customer Portal application.

Follow the steps below:

1. Open IIS:



2. Right-click the '**Sites**' folder. Select '**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 as to what port number to use. In this example, 81 has been used for demonstration purposes)**. If the 'Customer Portal folder has been copied to a different location then the physical path will need to be adjusted to the correct path.

4. The screen should look something like this:
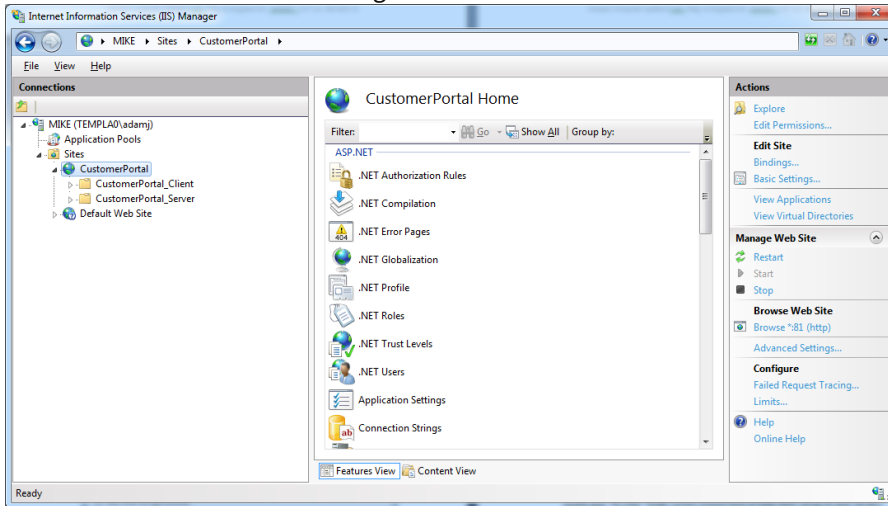


5. IIS will now need to be configured to serve the client and server applications. First, select the folder in IIS under the CustomerPortal folder '**CustomerPortal_Client'** right click and select '**Convert to Application**'
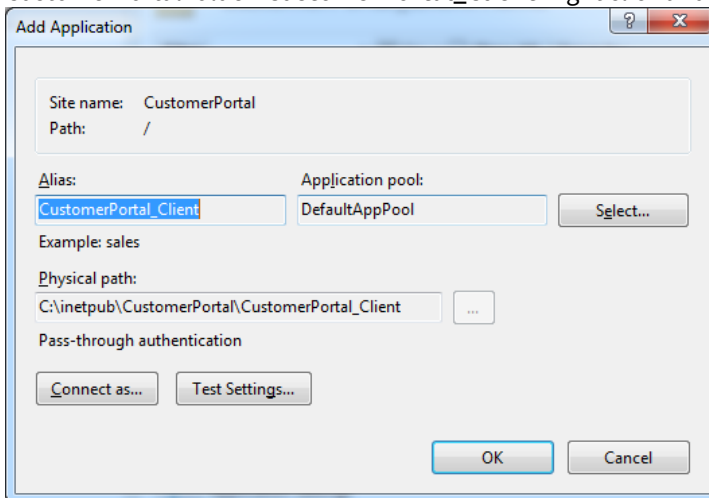


6. Click '**OK**' on this screen
7. Repeat Step 5 but instead of selecting '**CustomerPortal_Client**' now select '**CustomerPortal_Server**'
8. The screen should now look something like this
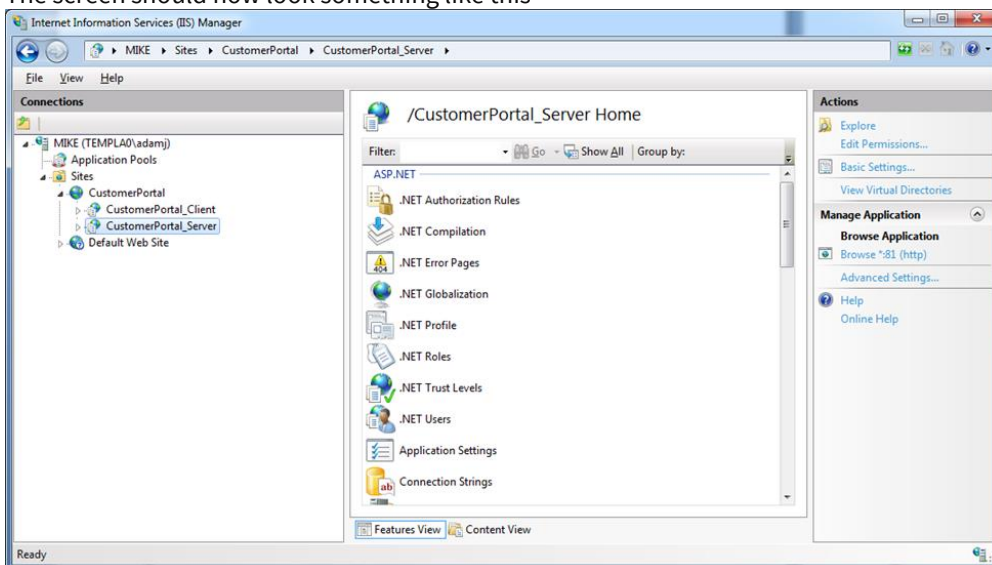
9. The configuration file will now need to be edited. This contains some settings such as the database connection string. The configuration file should be located in:

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

> **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 locate the connection strings. Adjust this in accordance with 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. Unless the Customer Portal folder was copied to another location, this should be:
      **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 it. Select '**Properties**'. Select the '**Security**' tab, then select '**Edit**', click '**Add**'
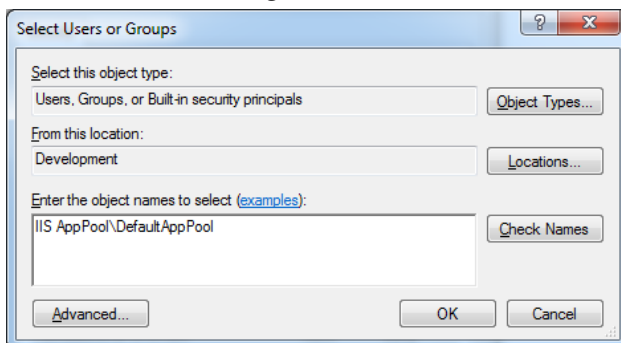


Please enter the object name as above (If the '**DefaultAppPool**' has not been used please make sure this is set above to the correct **AppPool**), make sure the location is set to the server, and click '**OK**'.

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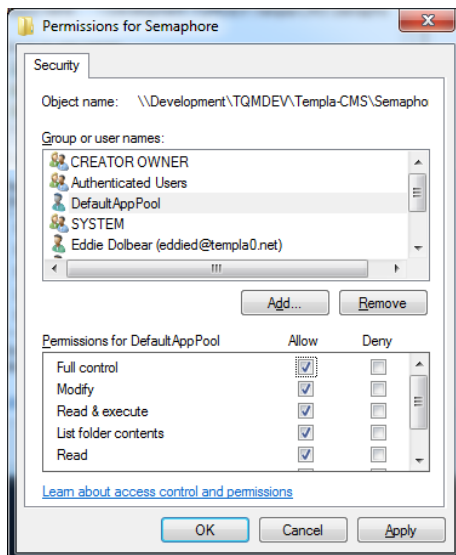


To complete please click '**Apply**'

## IIS User

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

# SQL SERVER CONFIGURATION

An SQL file will have been sent to you. This file contains all the necessary code that is required to set up the database 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
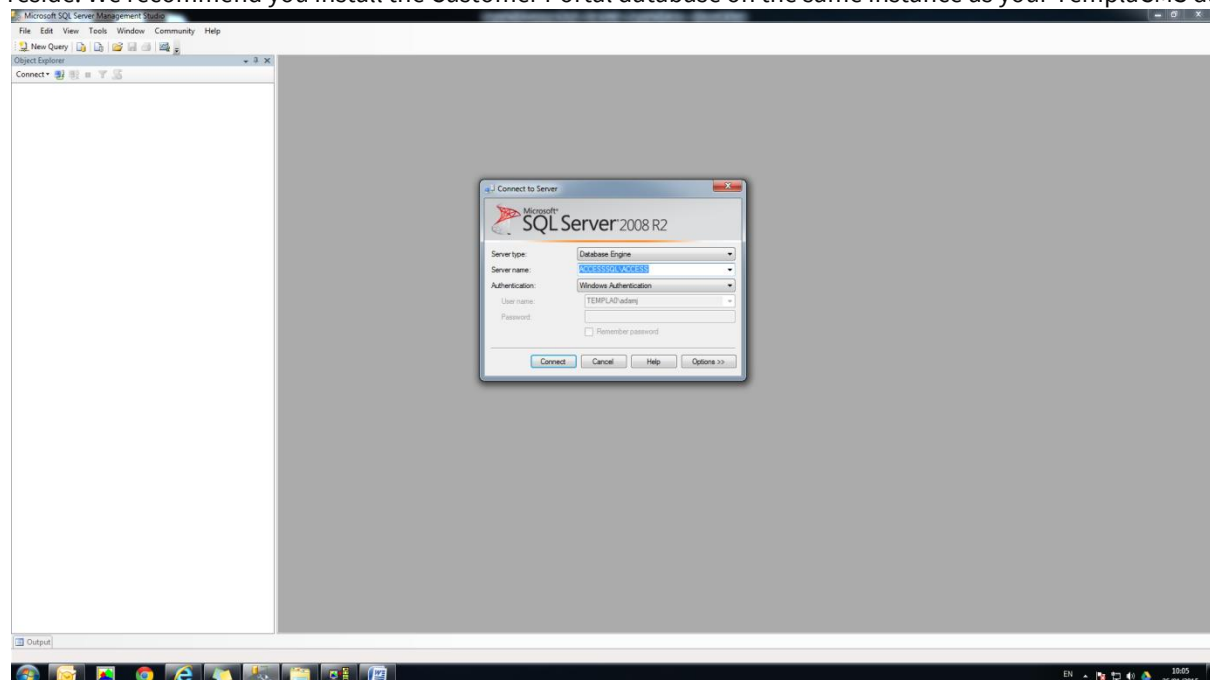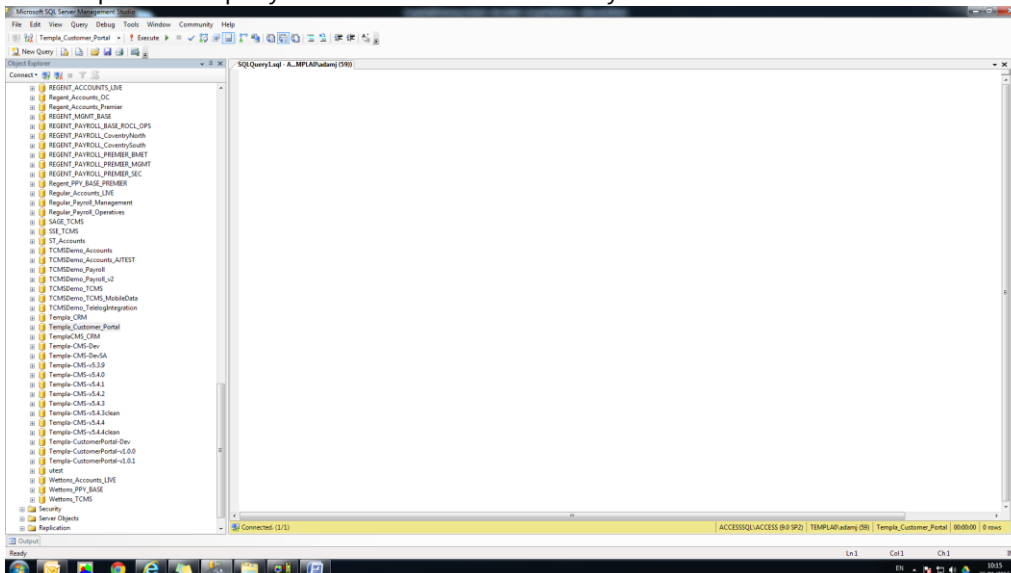


2. Once you have connected, please right-click on the '**Databases**' folder and click '**New Database**'
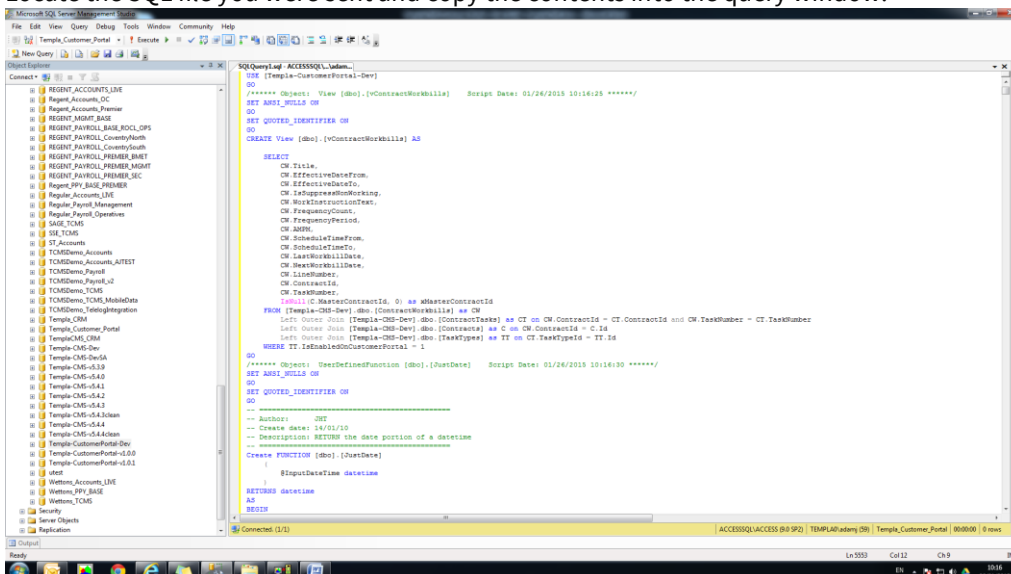3. Then enter the database name and click '**OK**'
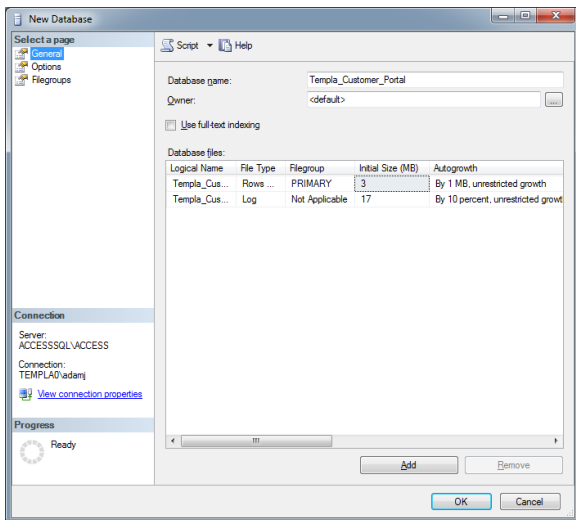
Your new database should now have been created
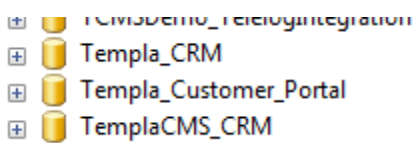


4.   Please open a new query window that is connected to your new database



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

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**'.
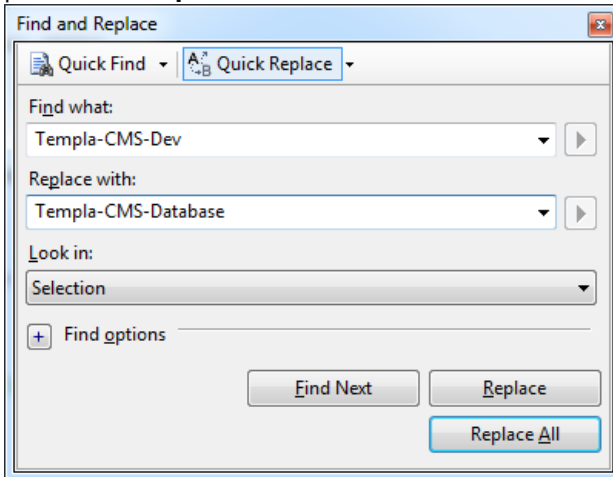


7. Then press **F5** to execute the script.
8. You have one security setting you must set. Expand the '**Security**' folder. Next, locate and expand the '**Logins**' folder. Within there, find the '**TemplaCMS**' login. Right click this, and then select '**Properties**'.
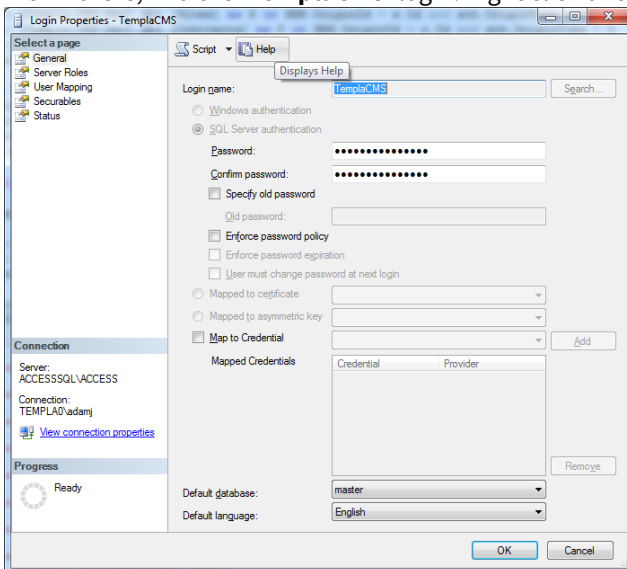


9. In the left-hand navigator on the properties screen, locate and click '**User Mapping'**,
   In the list please locate your new Customer Portal database and click the '**Map**' check box, then in the database role grid please also make sure the '**db_owner**' check box is checked, then click '**OK**'.
   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.
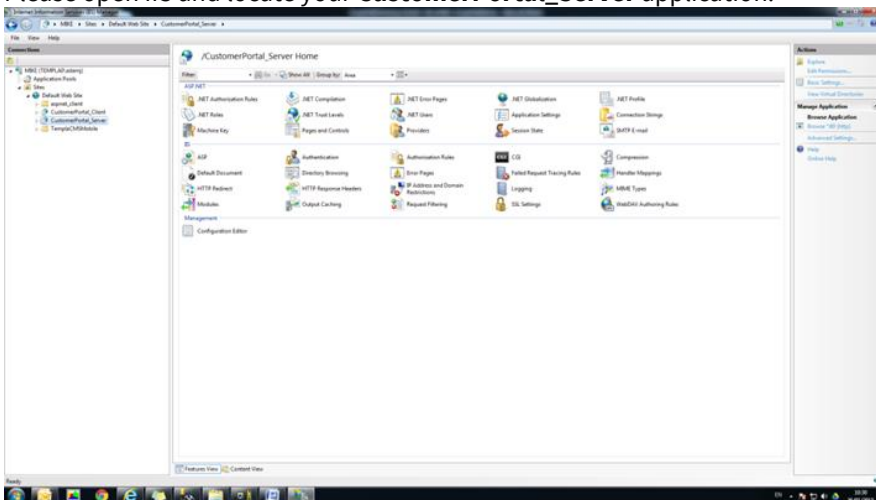
11. Double click the '**Connection Strings**' menu option
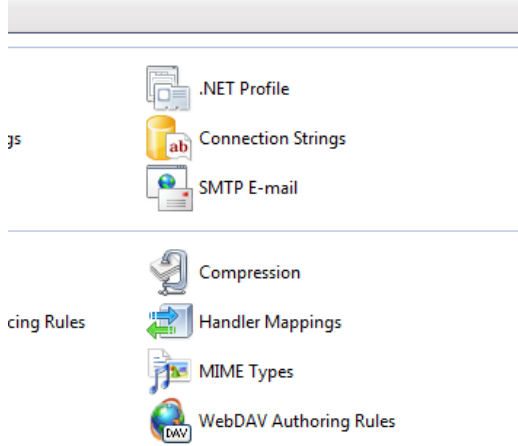


12. Double Click the line that reads '**TemplaCustomerPortal.Misc.My.MySettings.ConnectionString**'
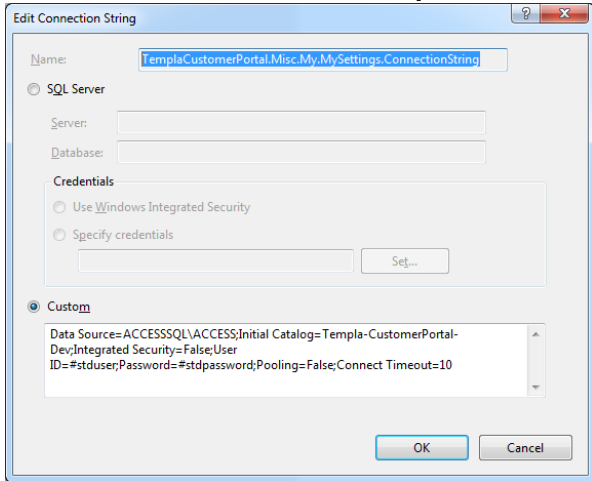


Please change '**ACCESSSQL\ACCESS**' to your instance, and change the '**Catalog**' **Templa-CustomerPortal-Dev** to your new Customer Portal.

13. Repeat Step 10 but change the '**TemplaCustomerPortal.Misc.My.MySettings.PooledConnectionString**'.

Your database is now fully configured and connected to your Customer Portal application.

# CUSTOMER PORTAL CUSTOMISATION

The Customer Portal is provided with a default "look and feel". This can, however, be customised by the 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** and **navigation.js** must not be updated. If there is a need to override the look and 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 of the buttons, there are three png files, each representing different states:
    - **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 of the buttons, there are three png files, each representing different states:
    - **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 another 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
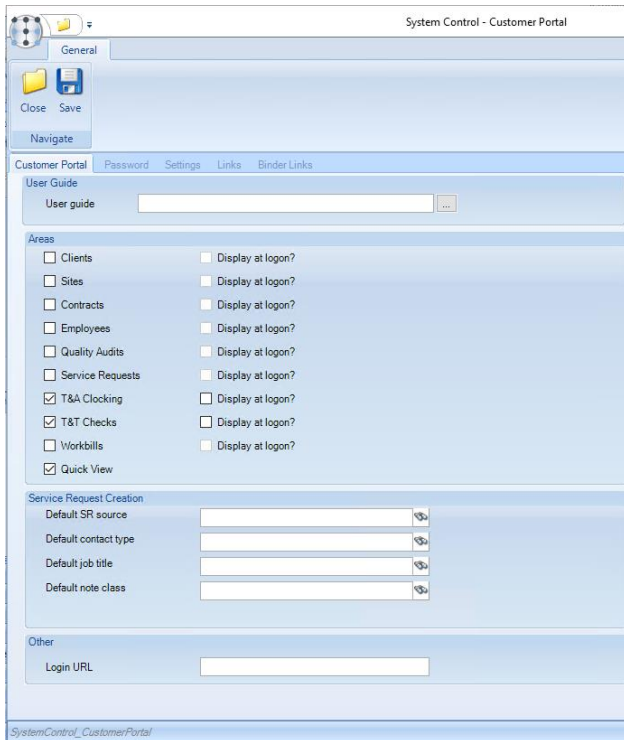


**User guide:** This is the path to the User Guide that the TemplaCMS Customer Portal user can download from the website.

**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.

**Service Request Creation:** This allows the user to control default options for creating Service Requests from the TemplaCMS Customer Portal

# SYSTEM CONTROL – PASSWORD TAB



**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).

# 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.

**Allow maintenance?**: This allows clients to create Service Requests directly via the Customer Portal

## SYSTEM CONTROL – LINKS TAB

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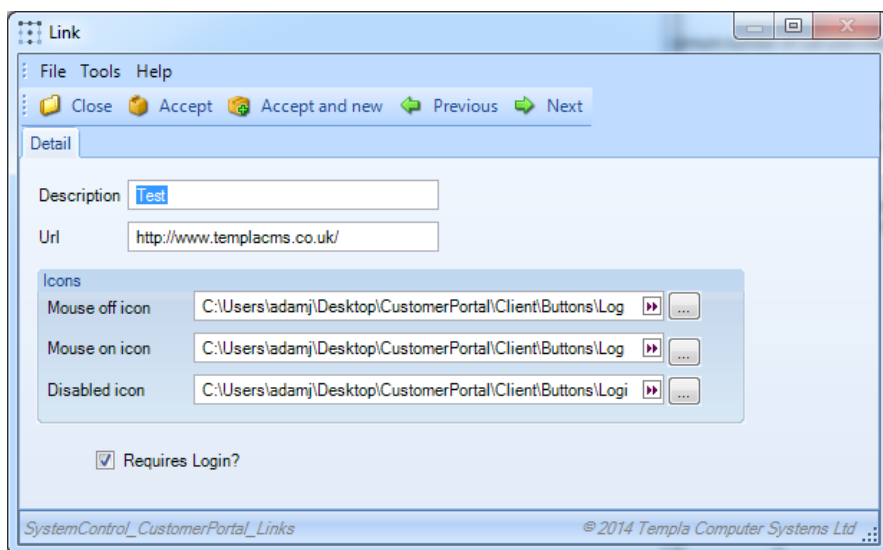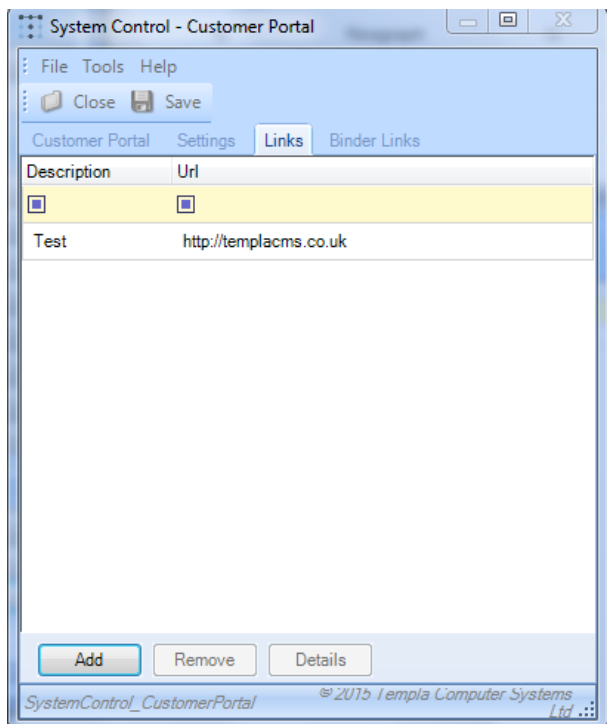




**Description:** The description of the Link.

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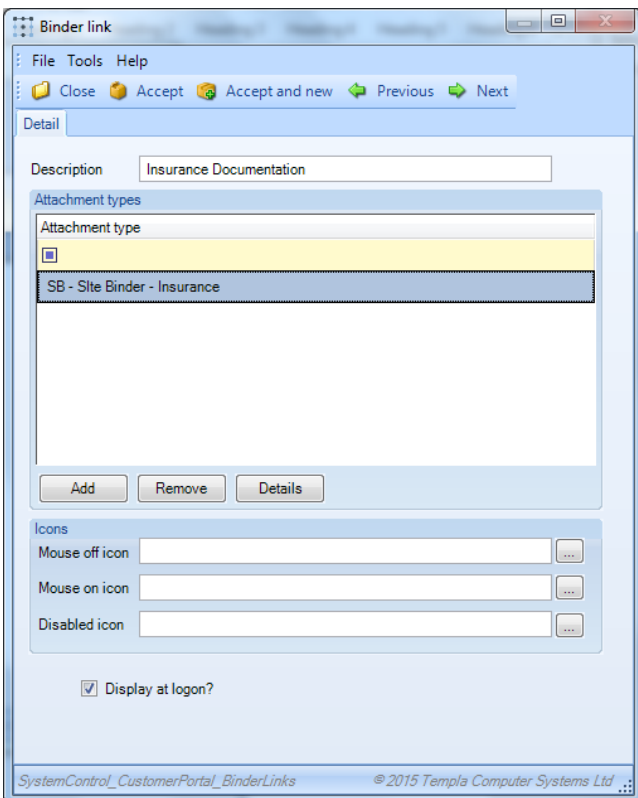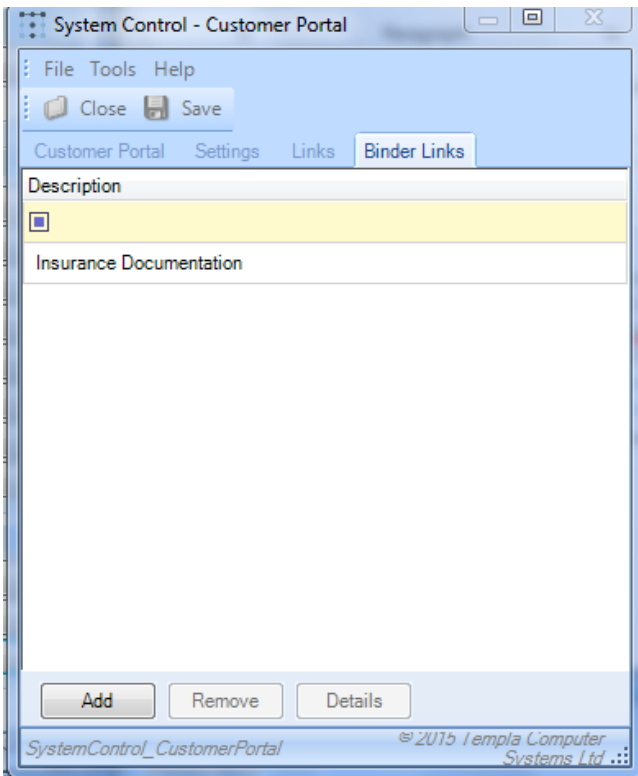
**Mouse on icon:** This allows you to set the mouse on icon path (Note this must be accessible by the IIS server, so it can be used by the website). This will be the icon the user will see when the mouse is hovered over the link.

**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.

# 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.

*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.

**Please Note**: documents must be assigned to a Site Binder and a Site Binder assigned to one or more sites for a client, for these documents to appear on the new binder link button.

## SYSTEM CONTROL – FREQUENCY COLOURS TAB
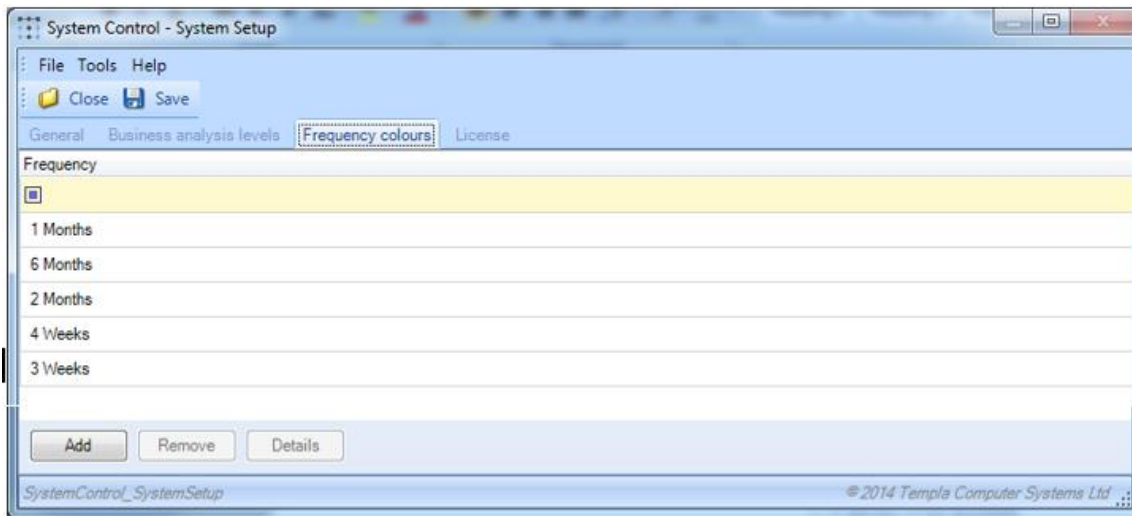


The frequency colours allow users to setup the colour that will be displayed if a workbill is of the specified frequency period.
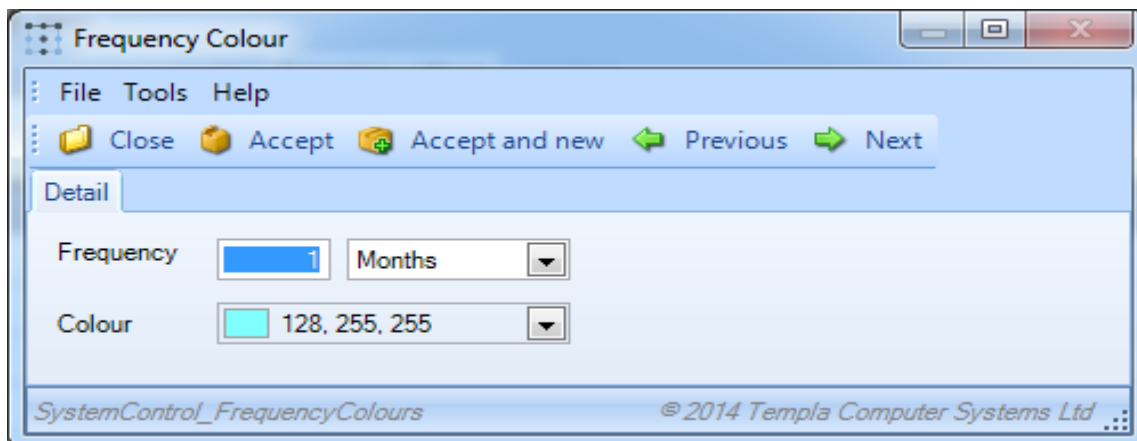


*Frequency:* The frequency period.

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

# 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.

***Allow Quick View access?:*** As access to Quick view does not require a user to log in, the client will not be known at the point of access.  However, it will be necessary to identify which clients (via their registration) allow access to QV.  Thus, only those clients where this is ticked will be accessible on Quick view.

# CLIENT REGISTRATION – SETTINGS
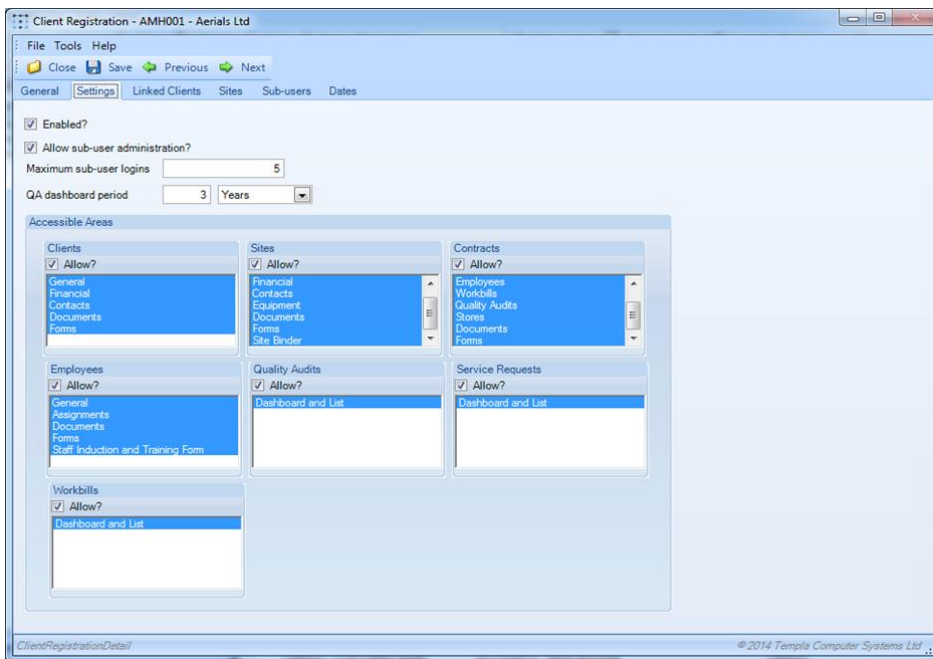


**Enabled?:** This setting allows the user to control whether a client can log in or not to TemplaCMS Customer Portal.

**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.
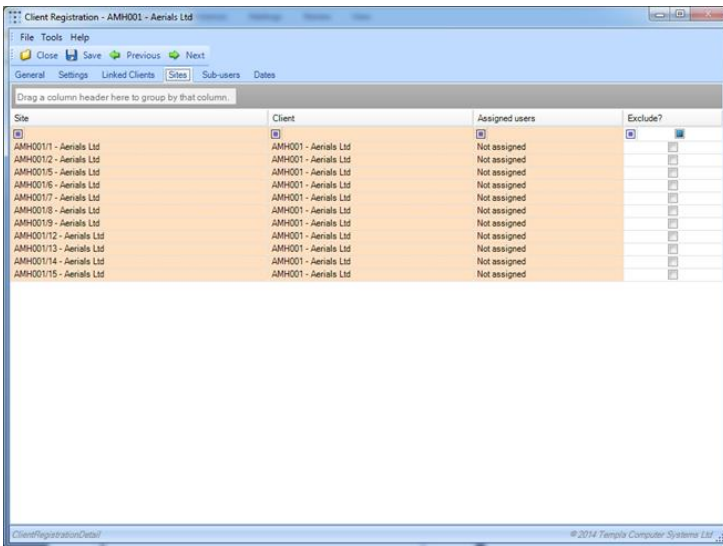
# CLIENT REGISTRATION – LINKED CLIENTS

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.
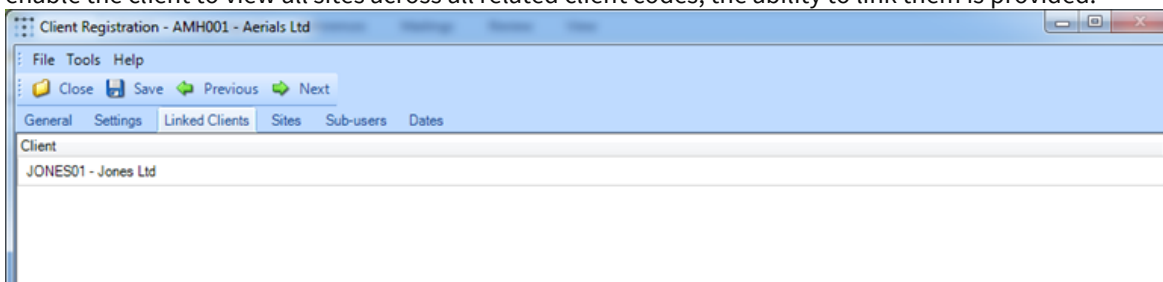


The access to Customer Portal will be agreed with the client under the primary client code, then this function allows you to link other client codes to the primary client. This then means all of the primary and linked client sites and their details will be retrieved in TemplaCMS Customer Portal under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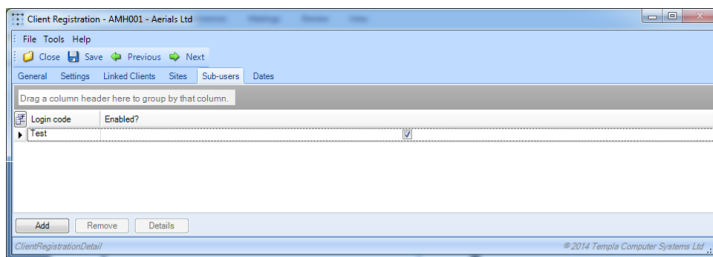
## CLIENT REGISTRATION – SITES



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.
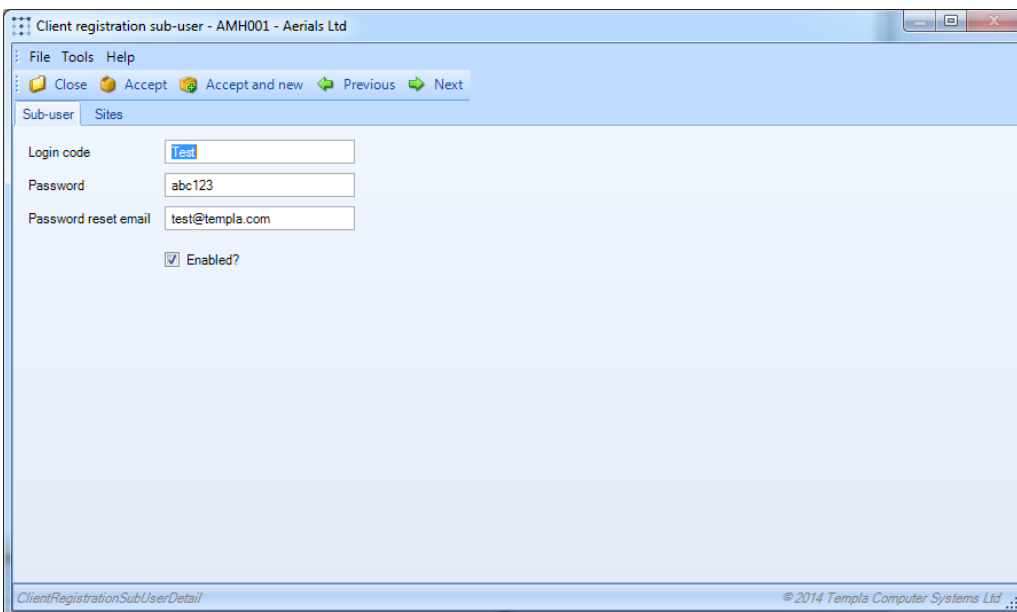


*Login Code:* This is the Login code that the sub-user will use to log in to TemplaCMS Customer Portal.

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

**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
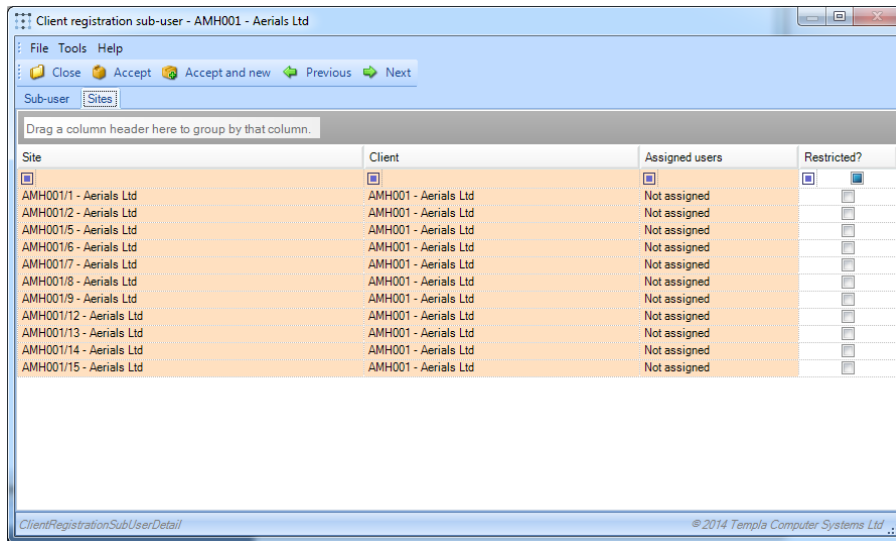


This function allows the user to restrict the sub-users' access to any of the client's sites, therefore if a client has a sub-user that manages only two of the client's sites, the user would select the sites here, and then when the sub-user logs in via TemplaCMS Customer Portal only the restricted sites'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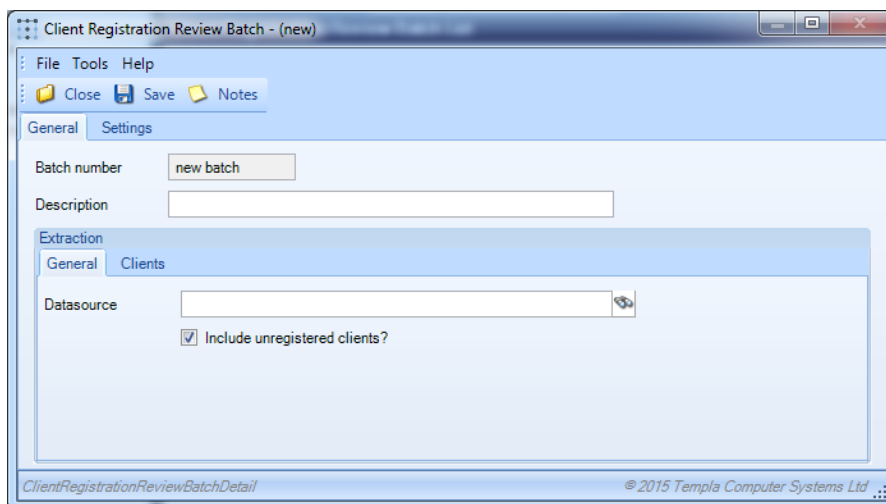


When saved, this jobs runs in the background:
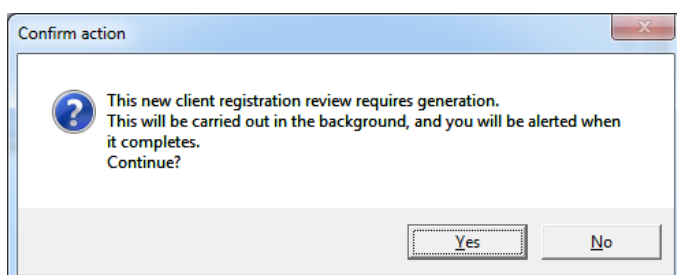
Once the batch has been generated, the settings tab will allow changes to be made to all the 'Review Items' pulled into the batch:
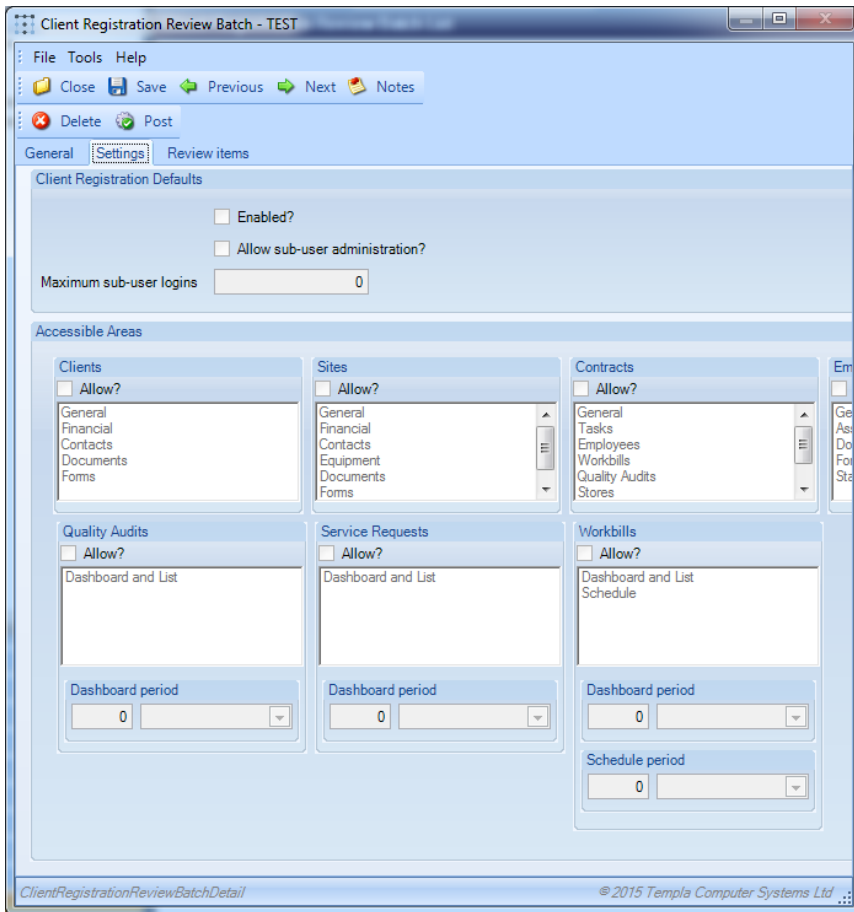


The batch can then be (deleted or) posted.
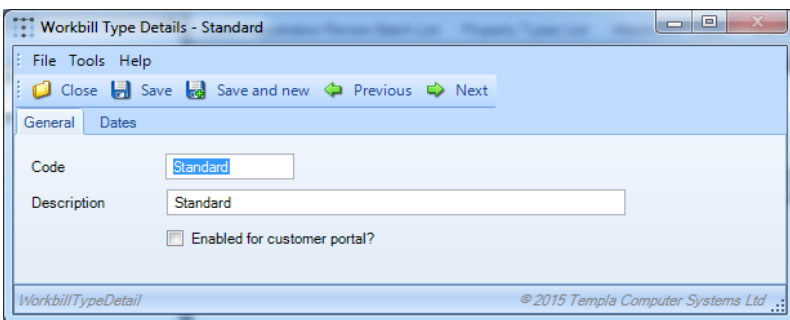
# TemplaCMS types

## TASK TYPES

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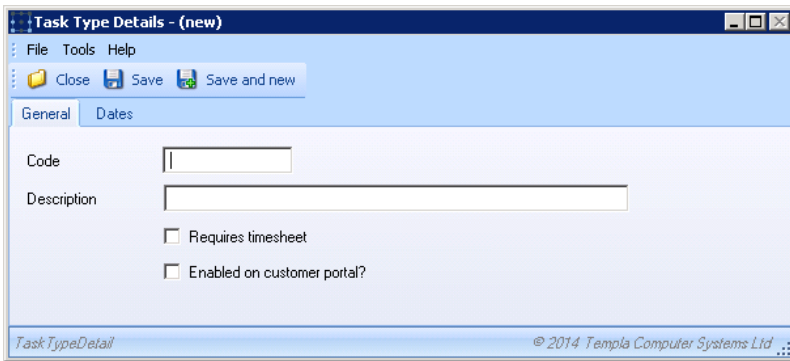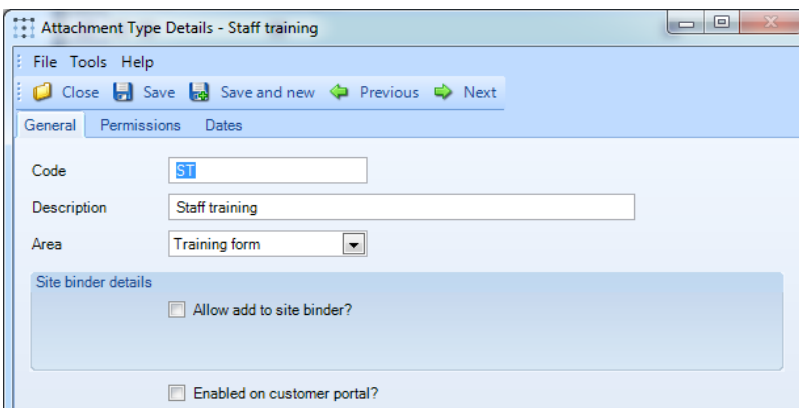


## WORKBILL TYPES

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:



## 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:
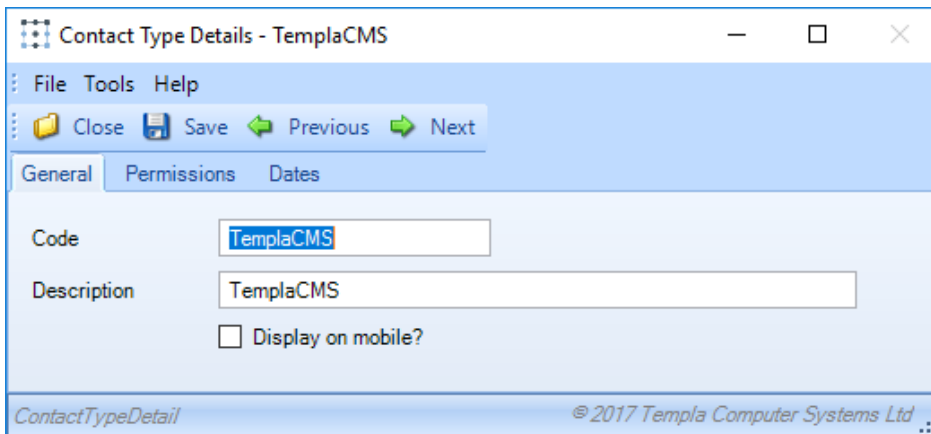
## CONTACT TYPES

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:

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