



User Portal Management User Manual

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1. Introduction

This document is intended to outline the actions required to modify User Portal Settings / Configuration – including setting end user username/password & access.

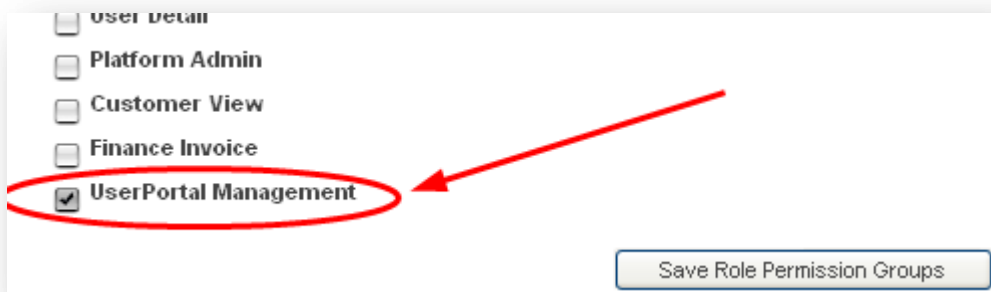
2. Document history

Version	Date	Author	Amendment Description
0.1	21 September 2010	Dean Cowan	Initial Document

3. User Portal Settings - Permissions

Once Emersion has configured your User Portal Instance, you will have access to User Portal Settings within Cumulus. If you don't, you may need to modify one of the **Roles** that is attached to the **Organisation Unit** that your Cumulus User belongs to. See the (slightly outdated) *Emersion SP Systems Administration Manual v1.1*. Please request a copy from Emersion if you do not have it.

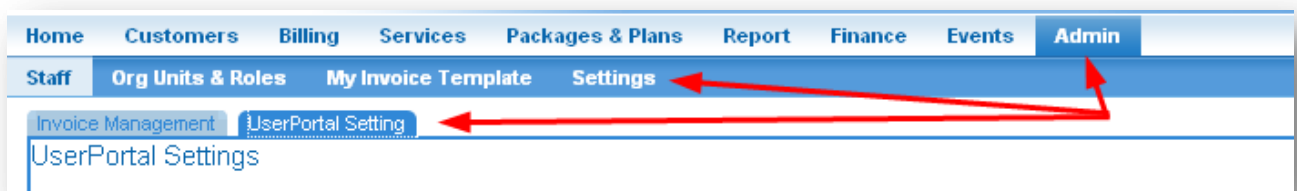
A permission called **UserPortal Management** has been created in Cumulus that provides access to both *User Portal Settings* (for your organisation) and also to *Manage User Portal* (for configuration of end-user username/password).



4. User Portal Settings – Configuration

You may now configure various basic settings relating to your end user portal (User Portal) that will enable you to customise the portal based on these settings & configuration.

Menu: **Admin > Settings > UserPortal Setting (tab)**



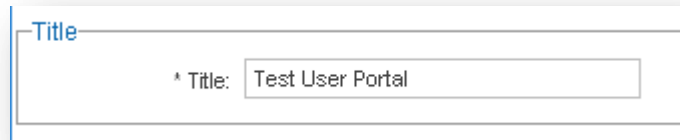
The initial page you will be presented with is a VIEW only. If you wish to edit any of these settings, please press the **Edit** button at the bottom right.



4.1 Title

The **Title** is a plain text input field that allows you to set the actual title of your portal.

This particular field can be included in your template(s) by calling the Smarty Function:
{userportal_title}



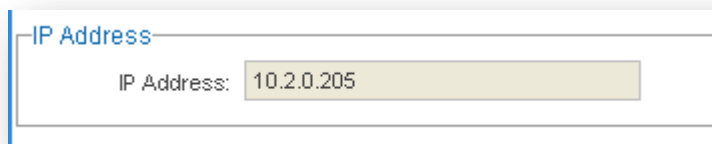
A screenshot of a web form titled "Title" in blue text. Below the title is a text input field with the label "Title:" and the value "Test User Portal".

Note: The default base & login templates include this detail by default.

4.2 IP Address

The **IP Address** field is VIEW only at all times. Emersion will issue you a static IP Address at the time your User Portal is configured and you cannot change this.

We display this information to you so you can update your own DNS records to point a sub-domain to your end user portal. Updating DNS records is beyond the scope of this documentation. Emersion recommends you contact your network/system administrator.



A screenshot of a web form titled "IP Address" in blue text. Below the title is a text input field with the label "IP Address:" and the value "10.2.0.205".

Note: Internal IP Address used for demonstration purpose only

4.3 Logo and Colours

Emersion allows customers to upload one (1) logo image file that can be included anywhere in a custom template. To use the uploaded logo, it must be referenced in your template as a combination of file system path + Smarty function:

/static/images/{userportal_logo}

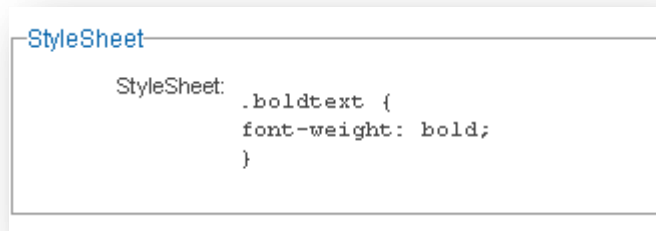
Example:



A screenshot of a web form titled "Logo and Colours" in blue text. Below the title is a text input field with the label "Header Logo:" and the value "emersion test.png".

4.4 Stylesheet

The Stylesheet text field allows customers to create custom CSS with selectors based on custom HTML code within the Base and/or Login templates. CSS configuration is beyond the scope of this document; however see <http://www.w3.org/Style/CSS/> for assistance.



This stylesheet code can be included in the <head> section of the templates by using the following Smarty function: {userportal_css}

Note: The function above **MUST** be included in <head> section of the template to be usable. Rendered output is as the following example:

```
<style type='text/css'>
.boldtext {
font-weight: bold;
}
</style>
</head>
```

4.5 Login Template

The Login Template text field allows for customising of the default login template. This template will be displayed **BEFORE** a user is logged into the system.

When you are first issued a User Portal, these fields will be empty & will force your User Portal Instance to use Emersion's default Base & Login Templates.

Both standard HTML & Smarty template code can be used here; however HTML & Smarty designing is beyond the scope of this document.

To begin modifying this template, we recommend you restore the Default Login Template by clicking the restore button → 

A dialog box will be presented that allows you to cancel the restore or continue.



The same default template code, as mentioned previously, will now be loaded as text into the text field. You can modify this template as you see fit – including inserting any of the Smarty Functions/Variables listed below and any custom HTML as necessary.

NOTE: Modifying the default templates could render your User Portal inaccessible. Please ensure either you know what you are doing, or obtain advice from your web designer.

4.5 Base Template

The Base Template text field allows for customising of the default login template. This template will be displayed **AFTER** a user is logged into the system.

When you are first issued a User Portal, these fields will be empty & will force your User Portal Instance to use Emersion's default Base Template.

Both standard HTML & Smarty template code can be used here; however HTML & Smarty designing is beyond the scope of this document.

Editing & restoring is as per the Login Template listed above.

NOTE: Modifying the default templates could render your User Portal inaccessible. Please ensure either you know what you are doing, or obtain advice from your web designer.

4.6 Terms of Service

The Terms of Service text field allows for the entry of your specific terms & conditions of User Portal use. You can include the data from this field in a template (supported in both Login & Base templates) by using the Smarty function {userportal_tos}

Note: Emersion does not escape/strip HTML from this Smarty function - all text will be dumped into the template

5. Manage User Portal – End User Configuration

By default, none of your end users will have access to your User Portal Instance.

To grant access to a particular customer you must first access the 'UserPortal Management' page for any particular end user. Search for a customer in the *Customer List* & click **Manage UserPortal**.

Customer > Customer List > Click Manage UserPortal link


Account Number	Customer Name	Account Type	Account Profile	Status	Billing Contact	Phone	Email Address	Start Date	End Date	Invoice Period Start	Invoice Period End	Create Order	Create Purchase	Manage UserPortal
117425	TEST ORG Pty Ltd T/A Test	ORGANISATION	BKB System Event Profile	Cancelled	Test Tester	0311111111	email@domain.com	Apr 29, 2010		1 Sep 2010	1 Oct 2010			

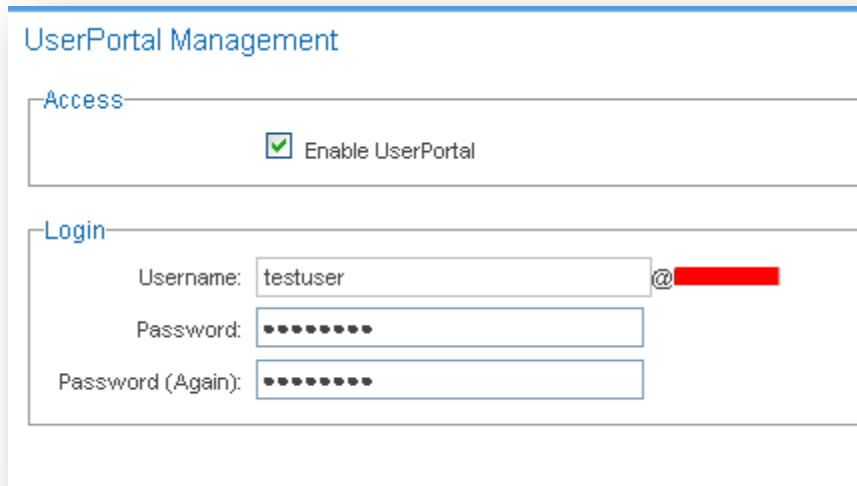
You will be presented with a default UserPortal Management page that shows the end user has not yet been enabled access:

UserPortal Management

Access

☐ UserPortal access enabled

To grant this user access, first click  then click **Enable UserPortal** – fill out a username & password and finally click **Save**



The screenshot shows a web interface titled "UserPortal Management". It has two main sections: "Access" and "Login". In the "Access" section, there is a checkbox labeled "Enable UserPortal" which is checked. In the "Login" section, there are three input fields: "Username:" with the value "testuser", "Password:" with masked characters, and "Password (Again):" with masked characters. The "Username:" field is followed by an "@" symbol and a redacted email domain.

You will then receive a notification that the user portal user was created / updated.

If you wish to modify the user at any time, follow the same process as above.

6. User Portal Templates – Smarty Templates

Emersion's User Portal uses Smarty Templates to render the final page to end users' browsers. See <http://www.smarty.net/manual/en/smarty.for.designers.php> for Smarty usage instructions.

NOTE: Modifying the default templates could render your User Portal inaccessible. Please ensure either you know what you are doing, or obtain advice from your web designer.

6.1 Smarty Functions & Variables

Emersion has developed a small set of Smarty functions & variables that can be used in the templates to extract various pieces of information from either the logged in end user or the parent account. These are as follows:

Smarty Function	Description	Comments
{userportal_logo}	Returns the default header logo that a customer has uploaded	PNG, JPG, GIF file formats accepted. Max 150px W by 80px H recommended values - not constrained in UI. Image width/height can be modified through parameters (ie. width=50%, etc)
{userportal_title}	Returns the title that a customer has set via the UI	The UI constrains the total length of this field so as not to break browsers - Max Length = 60 (chars)
{userportal_css}	Returns the custom CSS that a customer has set via the UI	The customer MUST add this function to the <head>...</head> section of the template for the CSS to be usable if a custom template is being used. The default login & base template will have the {userportal_css} function included by default.
{userportal_tos}	Returns the terms of service that a customer has set via the UI	Emersion does not escape/strip HTML from this Smarty function - all text will be dumped into the template
{userportal_abn}	Returns the ABN of the customer that this User Portal is assigned to	Note: If no ABN is found, nothing will be display. Emersion suggest customer uses custom text in template.
{userportal_companyname}	Returns the (short) Trading Name of the customer that this User Portal is assigned to	If short Trading Name is not suitable, Emersion suggest customer uses custom text in template.
Smarty Variable	Description	Comments
{User}	Returns the end user <i>FirstName LastName</i> combination from the Primary Contact of the end user account	This variable allows for a dynamic name listing depending on who has logged in. Can be used anywhere in the Base template only.
{userportal_current_balance}	Returns the current account balance of the end user account.	Note: Can only be used in the Base template

-END DOCUMENT-