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Web Centre v3

Installation and configuration

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Prerequisites

Pharos

The Emos WebCentre supports the following versions of Pharos Uniprint. Pharos should be installed and configured before installing the Emos WebCentre. Apply any hot-fixes for Pharos: (http://www.pharos.com/support/downloads/uniprint/UP-SPHF.html)

- Pharos 7.2
- Pharos 8 and above

The following optional Pharos components are required:

- Pharos EDI

Microsoft Windows™

The WebCentre runs on the following version of Microsoft Windows, 32bit or 64bit:

- Windows XP
- Windows Vista
- Windows 7
- Windows 2003 Server
- Windows Vista Server
- Windows 2008 Server
- Windows 2008 R2 Server

The following Windows components are required on the server running the Emos WebCentre and should be installed and configured first:

- Microsoft IIS version 6, 7, 7.5 or later.
- ASP.Net Version 3.5 SP1

Windows 2008 and above

The following features must also be installed:

- .Net Framework 3.5.1 Features
- Web Server (IIS)
  - Asp.NET
  - Management Tools
  - **IIS 6 Management Compatibility**
  - **Static Content**

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Pharos EDI

When using Pharos version 8 or above, the Pharos EDI must be configured to allow retired calls.
On the server running the EDI, add the following (string value) registry key:

32bit
HKEY_LOCAL_MACHINE\Software\Pharos\Pharos EDI\Enable Retried Calls

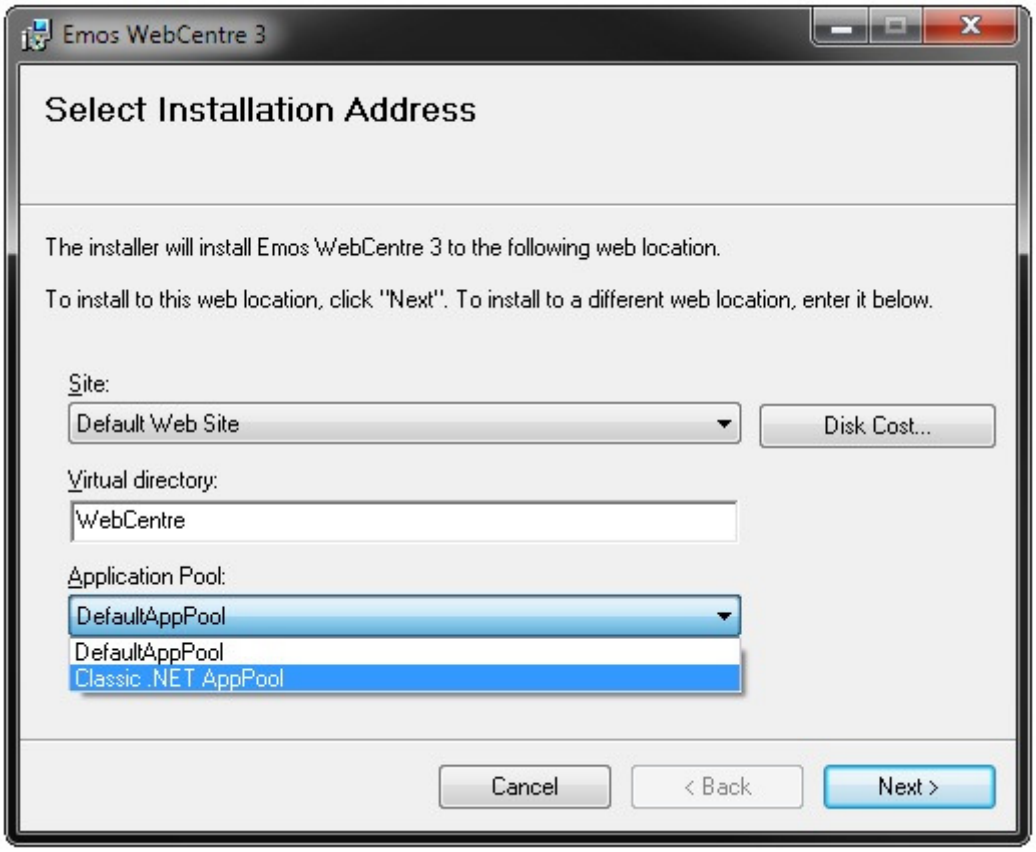
64bit
HKEY_LOCAL_MACHINE\Software\Wow6432Node\Pharos\Pharos EDI\Enable Retired Calls

Set the Value Data to: 7.2

Installation

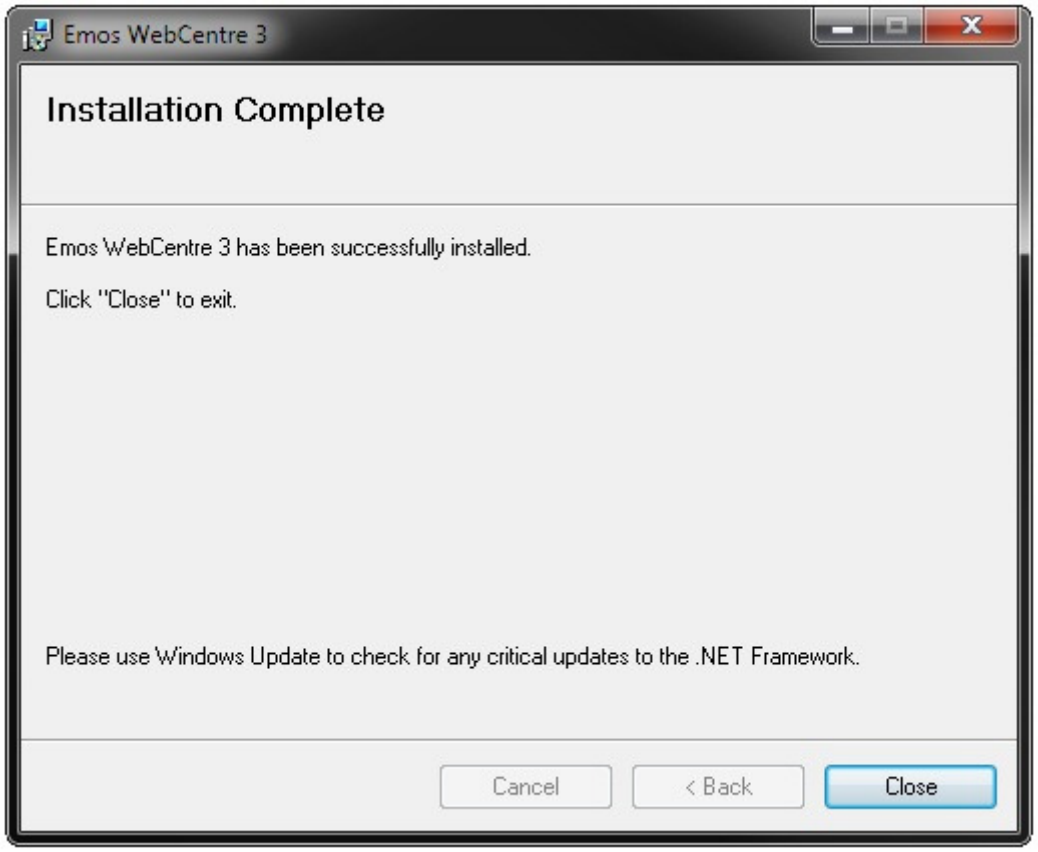
The latest installation package can be downloaded from the Emos website: http://www.emos.com/support/prodinfo.asp?prodid=105

Once the prerequisites have been met the WebCentre can be installed by copying the installation package onto the host server and executing it as the local administrator user.



Select the *Site* and *Virtual Directory* to install the WebCentre to. Select *Classic .NET AppPool* from the list of available Application Pools if prompted.

Click *Next* to continue.



Once complete, the WebCentre will be installed and the IIS Web Application will have been created at the address chosen.

Post Installation – Pharos Database

An update must be applied to the Pharos Database. This update adds SQL Stored Procedures and Views. It does not modify any existing tables or data.

Execute the *install.sql* SQL script using any SQL client (such as Microsoft SQL Management Studio Express) against the Pharos database. This script can be found in the *Program Files*\Emos\WebCentre or *Program Files (x86)*\Emos\WebCentre directory.

Post Installation – IIS localisation

Using IIS Administrator, check that the PharosEDI localisation settings match those of the WebCentre. The localisation settings can be found under the properties of a Virtual Directory: ASP.Net->Edit Configuration->Application Tab->Culture and UI Culture

Configuration

Web Application Configuration

Web application directory/web.config

The *Web application directory* is the base directory of the IIS wwwroot folder plus the name of the *Virtual directory*. Most commonly: *c:\inetpub\wwwroot\webcentre*

The *Web.config* holds all configurations for the WebCentre as an ASP.Net Web Application under Microsoft IIS. The file can be edited directly using a text editor or more easily by using the *Internet Information Services (IIS) Manager* installed with IIS and found in Control Panel->Administrative tools.

The Internet Information Services (IIS) Manager can be used to configure (among others):

- Availability
- Network based access control
- Security
- SSL Certificates
- Logging and Tracing
- Custom Error pages

Please see Overview of Deploying ASP.NET Applications in IIS 6.0 (IIS 6.0) and Web Server (IIS) 7 for more information.

WebCentre Configuration

All WebCentre configurations are held in an xml file and can be modified using the *WebCentre Configuration Tool*. The tool can be used to configure:

- Available Languages
- Currency
- Login Options
- Pharos connection and authentication
- Available user functions
- Available cashier functions
- Per-page options
- Localised prompts
- SQL Queries
- On-line payment provider settings
- WebCentre License

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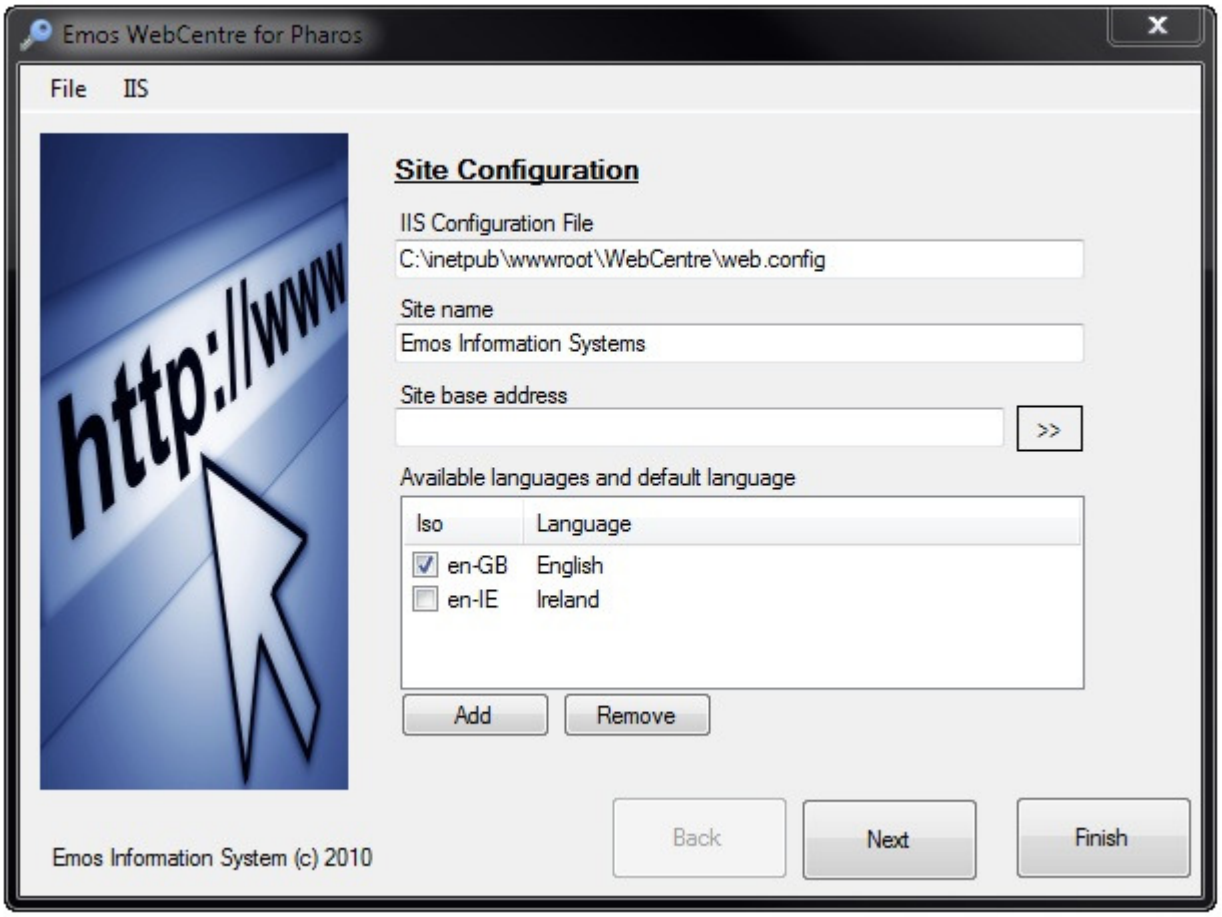
WebCentre Configuration



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Menu

File, Reload
Reload the configuration from the file, discarding any changes made.

File, Save
Save changes.

File, Manually Edit
Manually edit the configuration file in Notepad. It maybe more efficient to edit some settings manually; prompts can be changed using Notepad's find & replace functions.

File, Abandon Changes
Exit the Configuration tool without saving.

IIS, Application Tracing
Configure WebCentre tracing.

Enable Tracing
Enable WebCentre tracing.

Local Only
Only enable trace when HTTP requests are received from the local host.

Trace to Page
Write tracing messages to the end of every web page

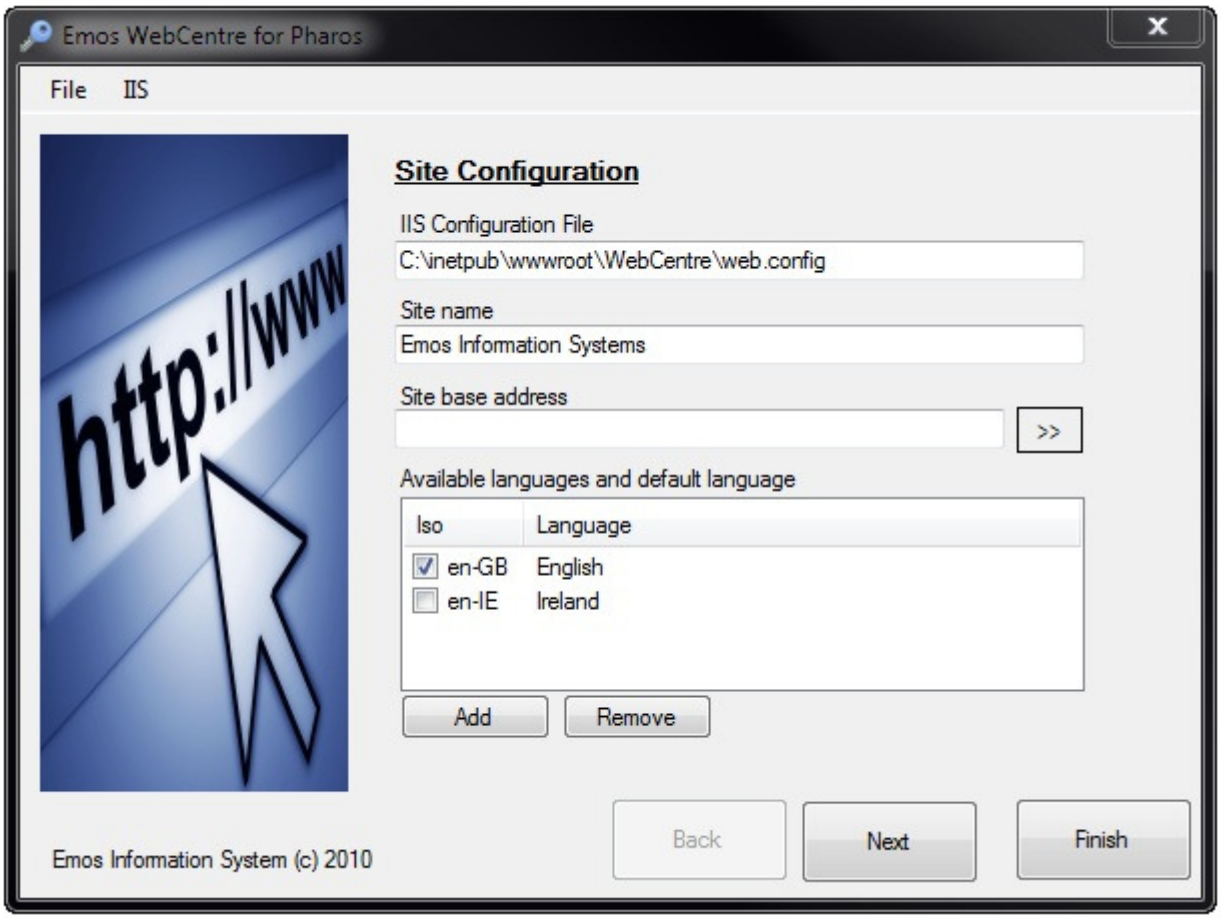
Write trace to File
Write tracing messages to a file.
The trace file must be writeable by the Asp.Net / service account user configured to host the WebCentre.

IIS, Restart IIS.
Restarts IIS

IIS, IIS Manager
Open the Microsoft IIS Management snap-in.

IIS, Manually Edit.
Manually edit the IIS WebCentre configuration file.

Site Configuration



IIS Configuration File
The location of the WebCentre's IIS configuration file (web.config). This will have been configured automatically during installation. If you move the WebCentre Virtual Directory for any reason the IIS configuration file location should be changed here to match.

Site Name
The site name displayed by the WebCentre.

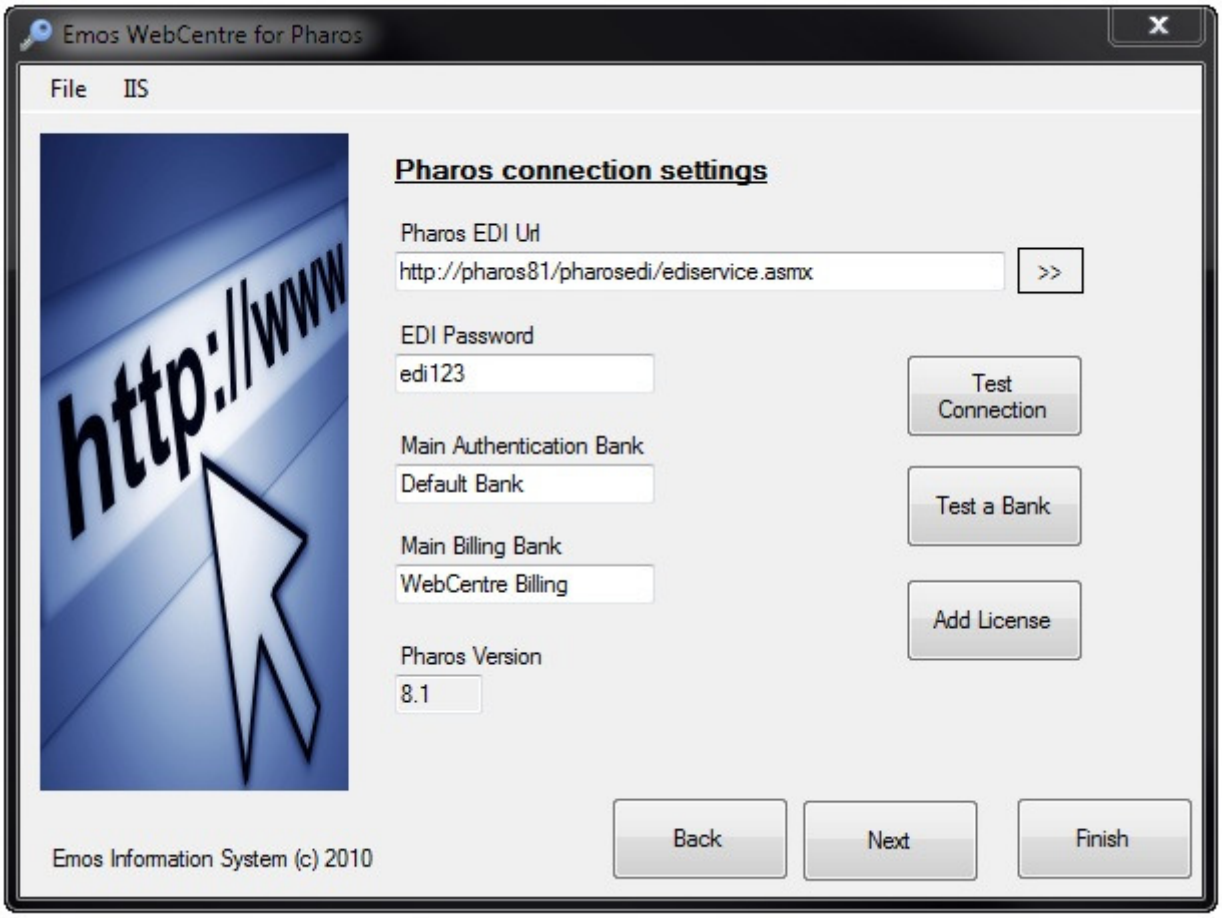
Site Base Address
The full URL of the WebCentre. This address must match any SSL server certificate being used and should be the address as it is visible from the internet (if required).

The >> button can be used to start the default browser and view the entered Site base address.

Available Languages and default language
A list of available languages users of the WebCentre may choose from and which language is used by default. The language affects all the text that is displayed as well as the currency symbol and format, and the date and time format.

If a prompt for a particular language has not been configured then the default language prompt is displayed.

Pharos Connection Settings



Pharos EDI Url
The URL used to connect to the Pharos EDI. Check Pharos Administrator for this information.

Pharos EDI Password
The Pharos EDI Password. Check Pharos Administrator for this information.

Main Authentication Bank
The Pharos bank used to authenticate users. Check Pharos Administrator for this information.

Main Billing Bank
The Pharos bank used when modifying users account balances. Check Pharos Administrator for this information.

Pharos Version
The version of Pharos Uniprint detected after a Test Connection.

Test Connection
Test the connection to Pharos using the EDI settings entered. This will test the connection and the WebCentre license information.

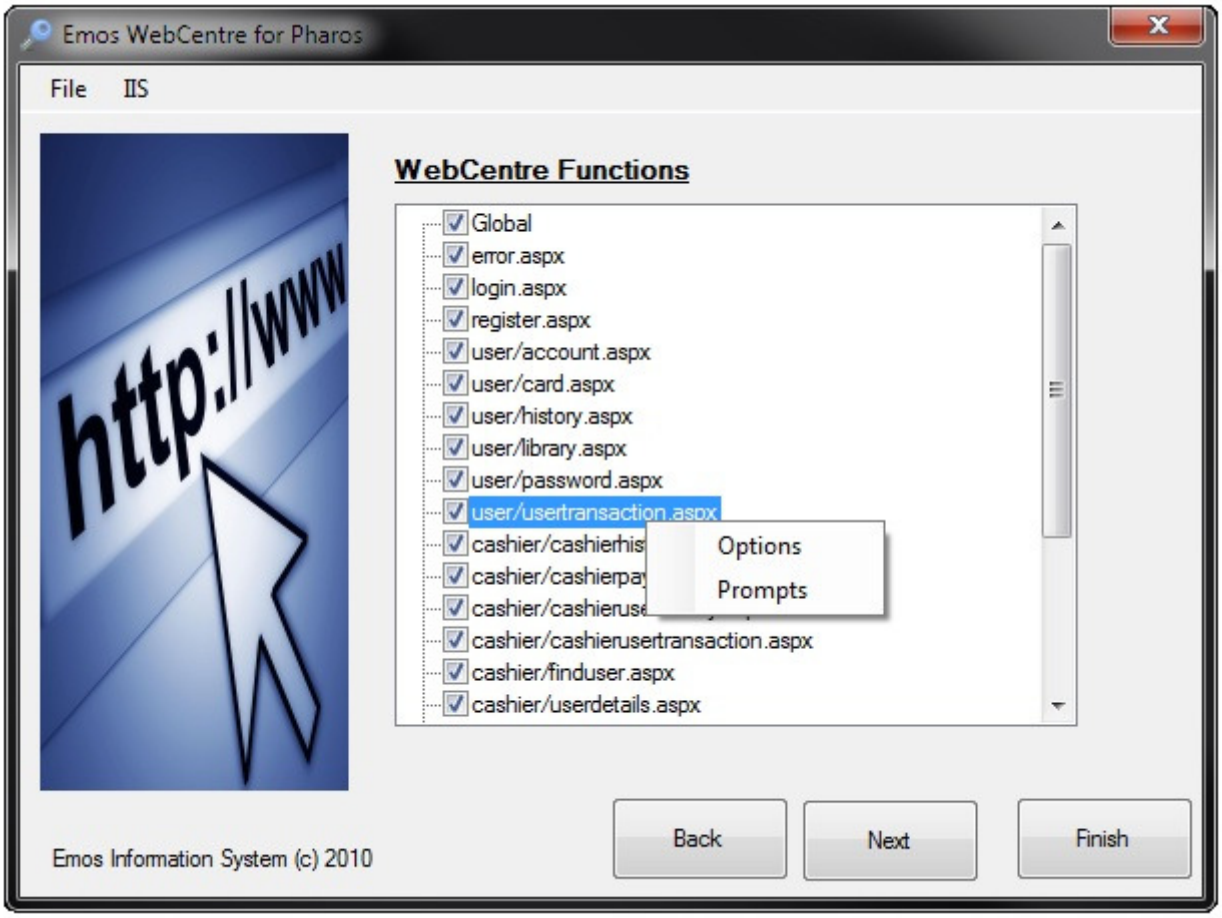
Test a Bank
Test any Pharos Bank by entering the name of the bank, a username and a password.

Add License.
View or update your WebCentre License details. Please contact Emos to obtain new license information.

mailto:support@emos.com

Please provide your Pharos Quick Key (Found in Pharos Administrator->Help About) and the expiry date of your Pharos installation.

WebCentre Functions



Disable or enabled webcentre functions and configure their prompts and options.

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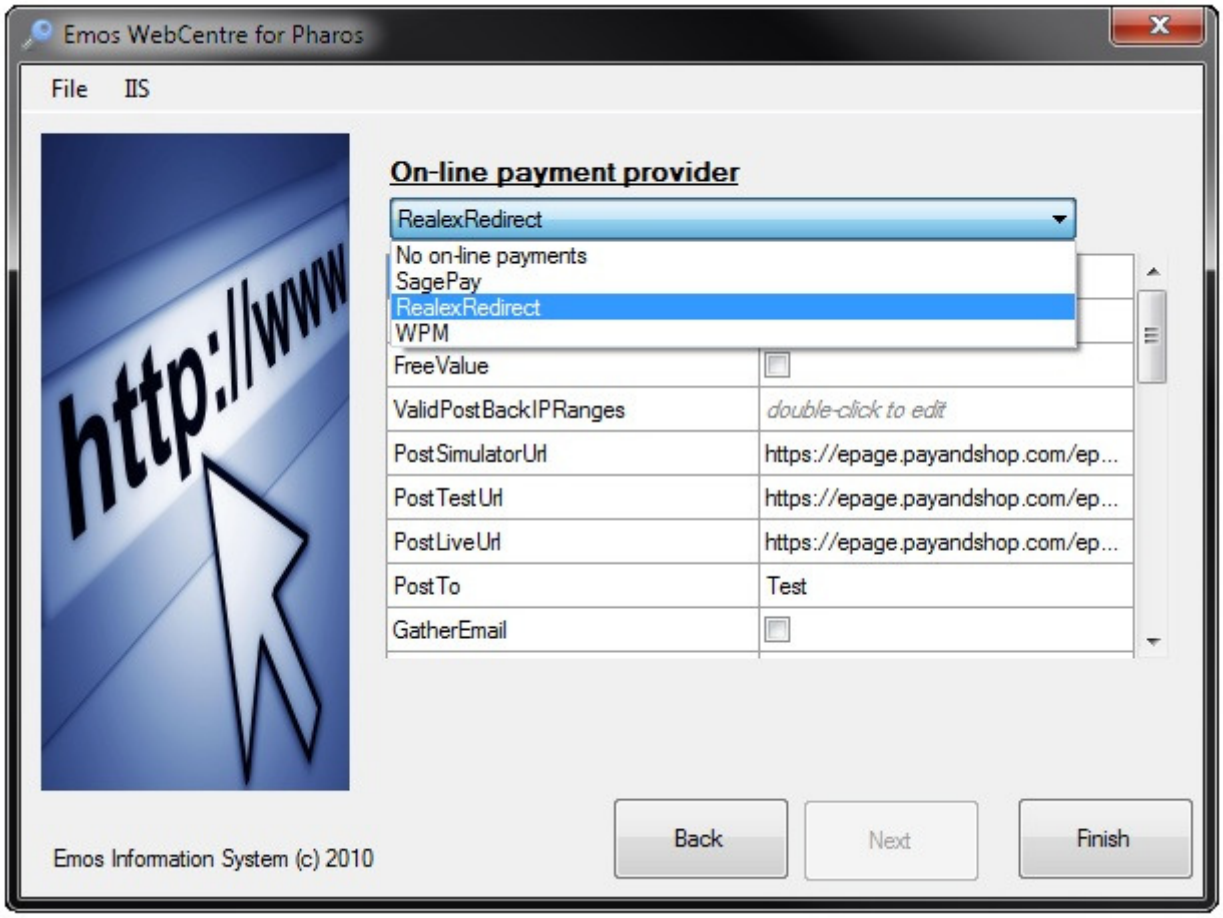
Disabling a function removes the function link from the WebCentre menus and blocks attempts to browse to the page.

Online payment providers



The WebCentre supports online account top-up via Credit and Debit cards by interfacing to one of many Online payment providers. Select and configure which provider to use.

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Please see the WebCentre documentation for each specific provider for configuration details.

Customisation Details

File Layout

The WebCentre is installed in the following two locations:

Inetpub\Wwwroot\WebCentre
- Bin - *WebCentre .Net Binaries*
- Cashier - *Cashier ASP Pages*
- Pay - *Online Payment ASP Pages*
- User - *User ASP Pages*
- Theme
  - Default - *Distribution Theme Files*
  - Site - *Site Theme Files*
- Web.config - *IIS configuration file*

C:\Program Files (x86)\Emos\WebCentre
- WebCentreConfig.exe – *Configuration Utility*
- WenCentreConfig.xml – *WebCentre Options and Prompts file*

Customisation

There are three areas to customisation:

Customizing which functions are available to WebCentre Users and Cashiers.
Customizing page look and feel.
Customizing page text.

Customizing which functions are available
Using the Web Centre Configuration utility you can change which pages are available to users and which Pharos access level may access each page.

Each page has options to enable and disable the functions available on that page.

Customizing page look and feel
Do not edit the files in the default directory, these files will be overwritten during an upgrade and your changes will be lost . Copy the files to the theme\site directory and edit them there.

LOCALISATION

When using the Master Page file, style sheet and XSLT files (see below), the WebCentre searches for the files in the following order:

1. Theme\Site\<filename>-<culture>.<file_extension>
2. Theme\Site\<filename>.<file_extension>
3. Theme\Default\<filename>.<file_extension>

A copy of the file to be modified should be made in the Site directory if one does not already exist. Only edit the copy. Upgrading the WebCentre does not overwrite customisations.

Each file may also have localised versions based on the currently user-selected culture (i.e. language) by adding the culture ISO code after the file name (with a hyphen) and before the extension.

Master.master is the ASP.Net master page file. This file is used to compile every page of the WebCentre on the fly.

Edit this file to change the look and feel of every page in the WebCentre in one place. Special care should be taken not to modify any of the ASP.Net instructions in this file (<% … %>)

Style.css is the CSS style sheet used on every page. Edit this file to customize the style, images and layout.

XSLT TEMPLATE FILES

These files are XSLT template style sheets used by the WebCentre when displaying data retrieved from the Pharos Database.

Edit these files to customize the look of the returned tabular data.

Account.xslt	For displaying users account information on the main My Account page. Data is retrieved using the standard *GetUsetDetails3* function.
AccountExtra.xslt	For displaying extra account information on the main My Account page. Data is retrieved using the *AccountExtra SQL Query*.
CashierHistory.xslt	For displaying cashiers credit, debit and refund history to cashiers on the Cashier History page. Data is retrieved using the *UserGetHistory SQL Query*.
CashierPaymentHistory.xslt	For displaying On-Line credit payment audit records to cashiers on the Payment History page. Data is retrieved using the *ListPaymentTransactions SQL Query*.
CashierPaymentTransaction.xslt	For displaying single On-Line credit payment audit records to cashiers on the Payment History page. Data is retrieved using the *GetPaymentTransaction SQL Query*.
CashierUserHistory.xslt	For displaying the select users (Find User) history to cashiers on the Cashier User History page. Data is retrieved using the *UserGetHistory SQL Query*.
FindUser.xslt	For displaying users to cashier based on the Find User query on the Find User page. Data is retrieved using the *ListUsers SQL Query*.
History.xslt	For display User History to Users on the User History page. Data is retrieved using the *UserGetHistory SQL Query*.
LibraryFines.xslt	For displaying Users Library Fines on the Library Fines page. Data is retrieved using the SIP2 Protocol from 3M.
payReceipt.xslt	For displaying a receipt to users for on-line payments. Data is retrieved using the *GEtPaymentTransaction SQL Query*.
payReceiptEmail.xslt	For emailing a receipt to users for on-line payments. Data is retrieved using the *GetPaymentTransaction SQL Query*.
ThirdPartyAccount.xslt	For displaying account information to 3rd parties
UserDetails.xslt	For displaying full account information to cashiers on the User Details page.
UserTransaction.xslt	For displaying full details on a single transaction to users and cashiers. Data is retrieved using the *GetTransaction SQL Query*.

IMAGES

The images directory holds the images displayed in the WebCentre. Add or change images to this directory and reference them from the Master Page file or style-sheet. Images are not localized.

Customizing page text

Prompts and text displayed on the WebCentre pages are retrieved from the Web Centre configuration file. They may be configured using the WebCentre Configuration Utility or by editing the XML configuration file directly.

Each message, prompt and text can have unique values depending on the currently user-selected culture (i.e. Language).

The Web Centre Configuration file is re-loaded automatically by the Web Centre when a change is made.

In addition to the prompts and text, when retrieving data from the Pharos database, the WebCentre using the XSL template file to build the tabular HTML. The column and/or row names are held with the XSL template file. See XLST files above.

CUSTOM FRONT PAGE

A custom front (or first) page may displayed prior to the Login page by creating a new html page in the theme/site directory and configuring the WebCentre Application in IIS Manager and setting the default page to the new page.

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Functions and Pages

Generic Options

Options common to all pages.

enabled
This page can be visited. Attempts to visit a disabled page will display a WebCentre error. Links to disable pages are removed from the menus.

accessLevel
The Pharos account access level that is needed to visit this page. This also affects which menu the link to this page is displayed in if any. An extra WebCentre only access level is also defined: ThirdParty.

includeInMenu
Include a link to this page in the User, Cashier or Administrator menus.

requireUser
An authenticated (logged in) user is required to visit this page.

requireSelectedUser
An authenticated cashier user is required to visit this page and the cashier must have first selected an account from the Find User page.

Global Settings

Options that affect all pages.

DefaultCulture
The default culture to use.

OverrideCultureCurrencySymbol
Use this currency symbol instead of the symbol defined by the culture.

User Login

Pages: **login.aspx**

PageAfterLogin
Re-direct the user's browser to this page after a successful login.

ForceChangePinEnabled
Check the user's password for a default value. If the users password match this value then re-direct the user to the Change Password page.

ForceChangePinWhen
Force change password when the user's password match this value.

ShowPassword
Show and require and password to log in.

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This Party Login

Pages: **thirdpartylogin.aspx**

ShowPassword
Show and require a password to be entered.

PageAfterLogin
Re-direct the user's browser to this page after a successful login.

New User Registration

Pages: **register.aspx**
Users can create their own accounts by entering account details.

IDPrefix
Automatically prefix this string to any new user ID entered.

GenerateID
Automatically generate new user IDs and do not prompt for the user to enter one.

GenerateIDSQLName
Use this SQL stored procedure to generate new user IDs

ShowEmail
Display an entry box for an Email address.

RequireEmail
Require an Email address to be entered.

RequirePassword
Require a password to be entered.

PasswordMask
The password must match this mask

RegisterActive
New accounts are registered active.

RegisterIsVisitor
New accounts are registered as visitors.
WARNING: **VISITOR ACCOUNTS ARE DELETED EVERY NIGHT.**

IDMask
User entered IDs must match this mask.

RegisterGroup
New accounts are created in this Pharos Group.

RegisterComment
New accounts are created with this comment.

RegisterBillingOption
New accounts are created with this Pharos Billing Options

RegisterToPage
After a successful registration re-direct the user's browser to this page.

My Account Page

Pages: user/account.aspx
Displays users account details and balances. Can also, optionally, display extra information based on a database query.

includeAccountExtra
Include the extra query on the page.

extraAccountQuery
SQL Query name to execute.

extraAccountTemplate
XSLT template file to be used to display the data returned by the query.

Card Functions

Pages: **user/card.aspx**
Users may disable a lost card.

User History

Pages: **user/history.aspx**
Display a searchable list of the most recent transactions for the user's account. If the user transaction details page (**user/usertransaction.aspx**) is enabled, users may select a transaction to view more detail.

User Transaction Details

Pages: **user/usertransaction.aspx**
Display complete details of a selected transaction to the user.

Pay Library Fines

Pages: user/**library.aspx**
User can view their library fines and pay for them using their Pharos account balance. The WebCentre connects to a SIP2 server to retrieve a list of un-paid library fines and informs the server that one or more of the fines has been paid for using the user's Pharos balance.

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SIP2ServerAddress
3M SIP2 Server Address

SIP2Port
3M SIP2 Server Port

SIP2UsernameFromPharosField
User's Library ID is held in this Pharos User field.

SIP2PasswordFromPharosField
Sip2T User's Library account password is held in this Pharos User field.

SIP2TerminalPassword
If required, the terminal password used when logging into the SIP server.

SIP2Language
SIP2 Language to use.

SIP2Location
The location defined in the SIP server.

SIP2IsTalis
The SIP2 server is a Talis server, use the Talis fine item details.

SIP2LoginUsername
SIP2 server login username

SIP2LoginPassword
SIP2 server login password

SIP2PaymentType
Payment type to use for SIP payments.

SIP2MustLogon
The WebCentre must login to the SIP server using the user's library login username and password.

AllowChangeAmount
When users cannot select single fine items, they may change the amount to pay.

AllowSelectItems
Allow users to select individual line fine items to pay for. This is not supported by all SIP servers.