SEDCO

User Manual

# This manual contains

1. Introduction to BANKCP web portal.
2. Requirement needs.
3. Instruction to create the database.
4. Instruction to setup the web portal configuration.
5. Information about the web portal, what web portal do, how it work, and how to use it.

**January/2021**

**Version 1.0**

Introduction

Bank configuration portal is a web portal that add configuration to the bank.

The web portal is responsible to login to an existing bank, add branches to the bank, define services on that branch and define the counters that will serve in that branch and what services those counters will provide.

There will be User for the bank to add configuration to the bank.

# Web portal Features

1. Users:

* Login to an exist bank which created before.

1. Branches:

* Create a new branch.
* Edit an existing branch.
* Deleting an existing branch.

1. Services:

- Create a new service.

* Edit an existing service.
* Deleting an existing service.

1. Counters:

- Create a new counter.

* Edit an existing counter.
* Deleting an existing counter.
* Two type of buttons (Teller, Customer Service).

1. Allocate services to counter:

* Allocate specific services for specific counter.
* Deleting an existing service from counter.

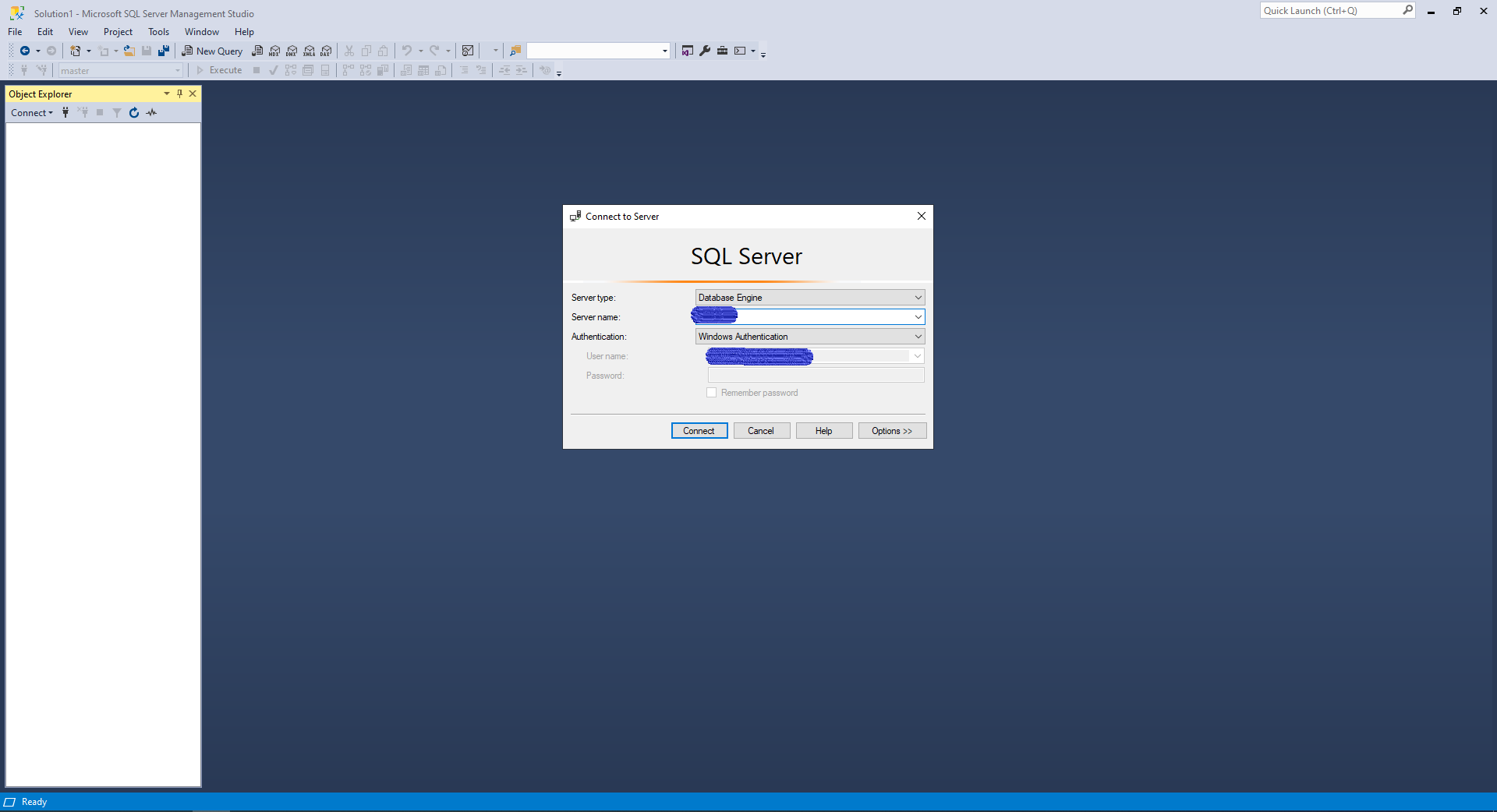
# Requirement

1. Computer device (pc or laptop) which running “windows”.

* Microsoft SQL Server Express (2012 or higher).
* Connection to internet.

1. Microsoft SQL server management studio on any machine that has access on Customer’s machine.

* You need to download it, because the data will be saved into the database.



1. IIS – Internet Information Services.

* You need it to publish the web portal through it.

Modern web browser like (*chrome, edge*).

# Deployment

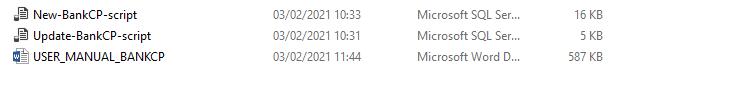
Deployment Folder: You will get file that contain the web portal file and the scripts for the database.



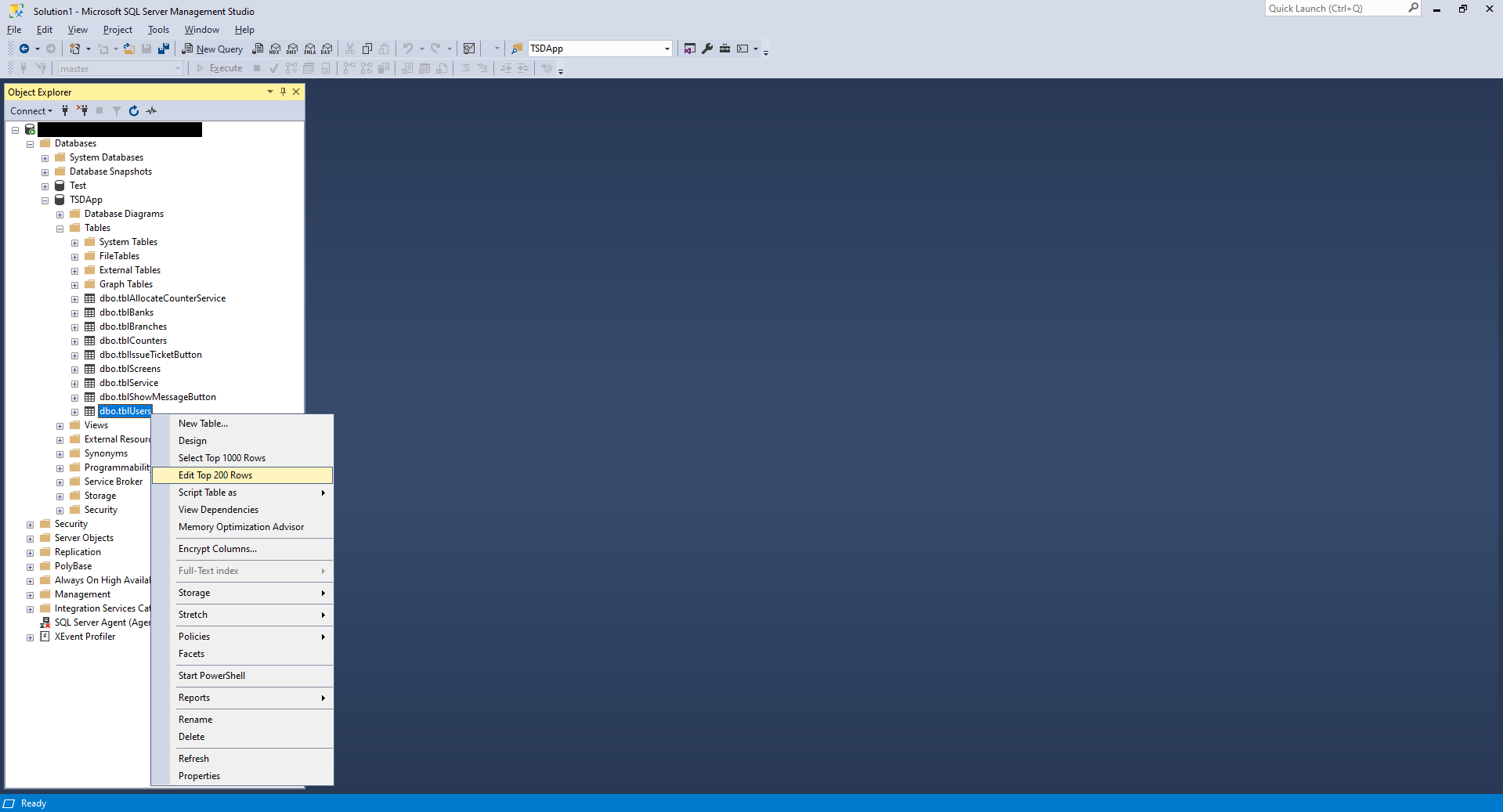
### Database:

1. First you need to open the file that called “Resource”,

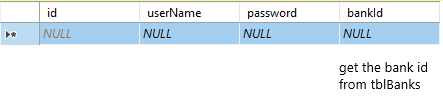
You will find scripts and the user manual as shown below:



* If you are already used the Ticketing Screen Designer Application you will open the script that called “Update-BankCP-script”.
  1. Execute the script.
  2. If You already have bank in the database you will need to add user to that bank:
     1. Right click to tblUsers and click on (Edit Top 200 Rows):



* + 1. Fill data for user (User-Name, Password, BankId: get the id to the bank that you already have in database).



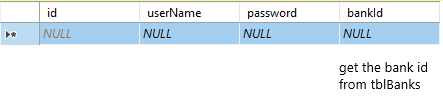
* If you are new to this web portal you will open the script that called

“New-BankCP-script”.

* 1. Execute the script.
  2. *You need to add bank to the table (tblBanks):*
     1. Right click to tblBanks and click on (Edit Top 200 Rows):
     2. Fill data for bank (name).



* 1. *You need to add user to this bank in the table (tblUsers):*
     1. Right click to tblUsers and click on (Edit Top 200 Rows):
     2. Fill data for user (User-Name, Password, BankId: get the id to the bank that you already added in database).



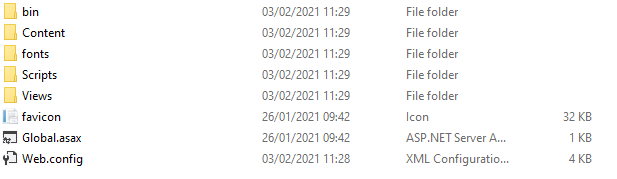
# Configuration

### Set up your connection string

1. First you need to open the file called BankCP”.

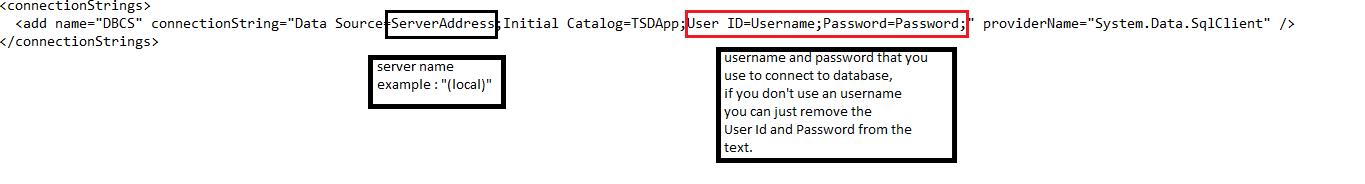
C:\Users\Moayad\AppData\Local\Microsoft\Windows\INetCache\Content.Word\Capture.PNG

You will find these files



1. Now we are going to update the “Web.config” file, you need to set up your own connection string to database.
2. Open the file called “Web.config” with notepad,

Find the tag that called “connectionStrings” and put your own data in it as it shown below:



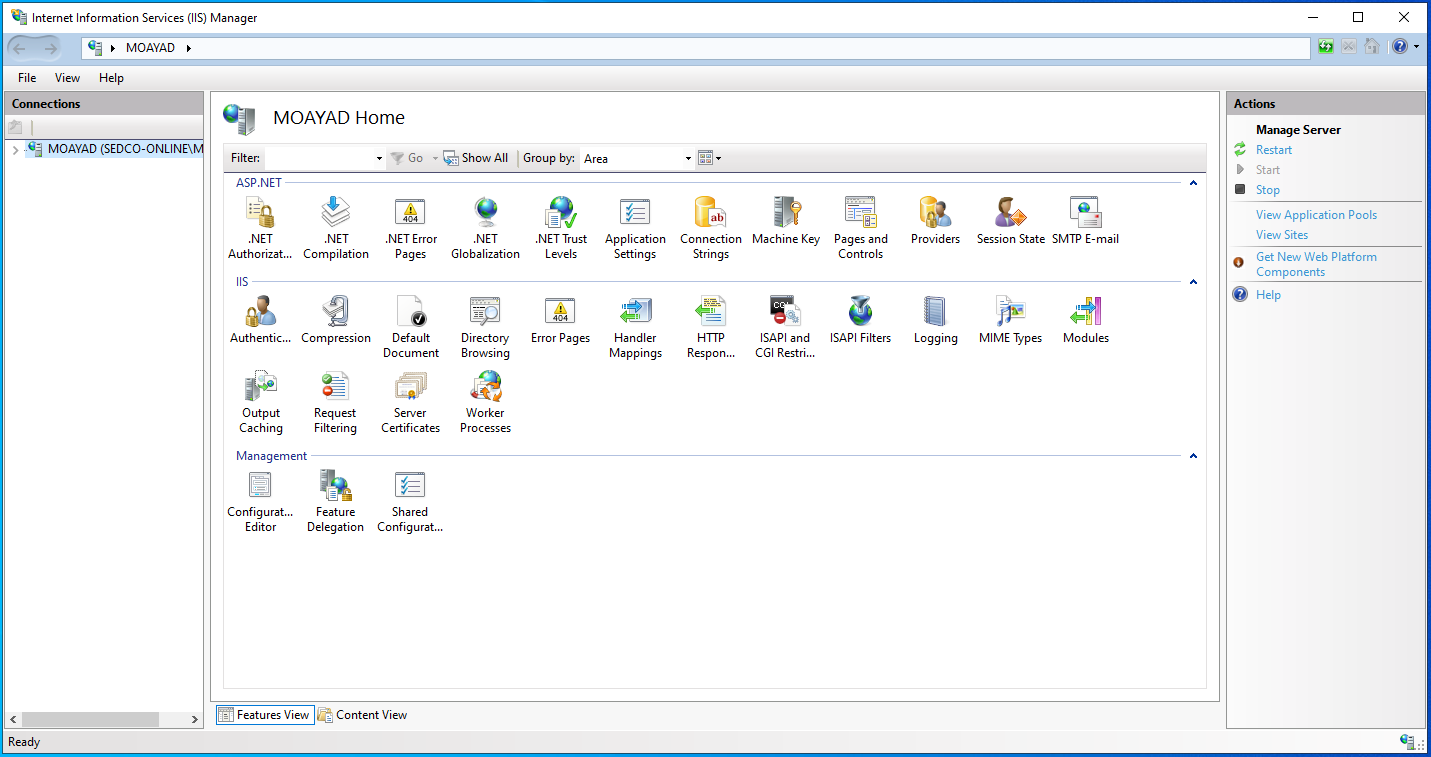
Fields to change:

1. Server Address: set your server name
2. Username: use your username that you use to login into SQL server management studio program.
3. Password: use your password that you use to login into SQL server management studio program.

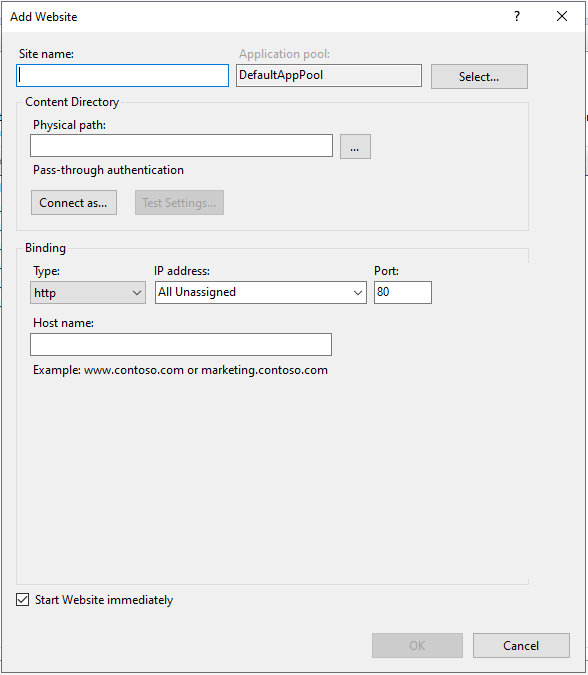
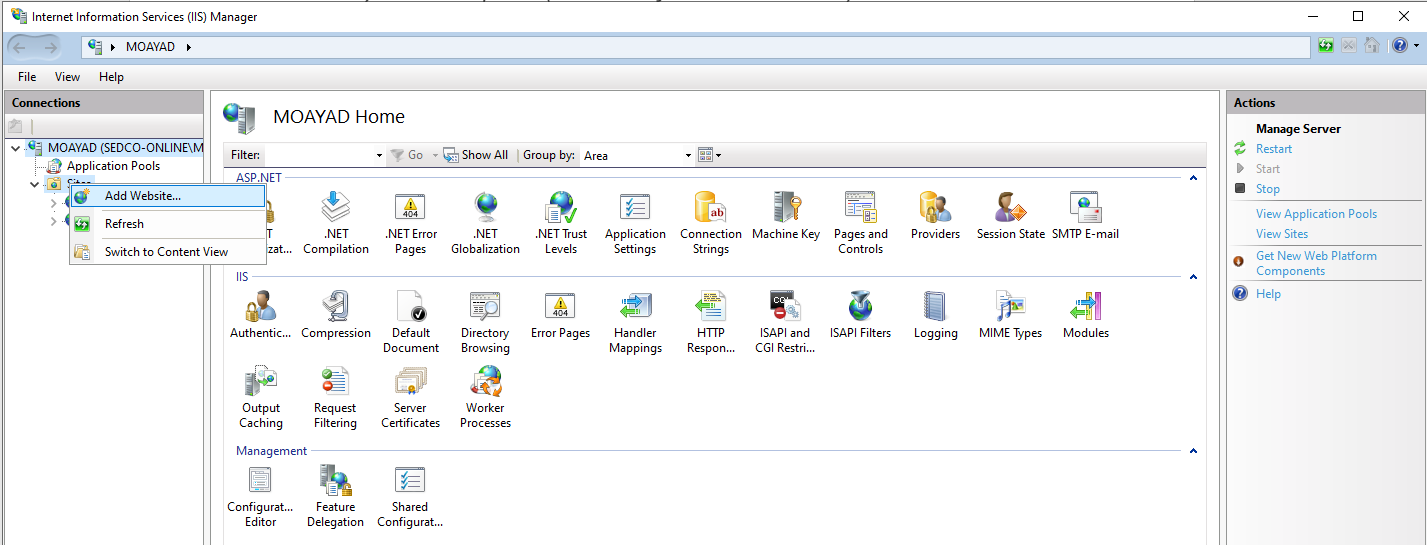
Note: if you don’t use username and password to login remove the section within the red rectangle in the picture above.

### Host web portal on IIS

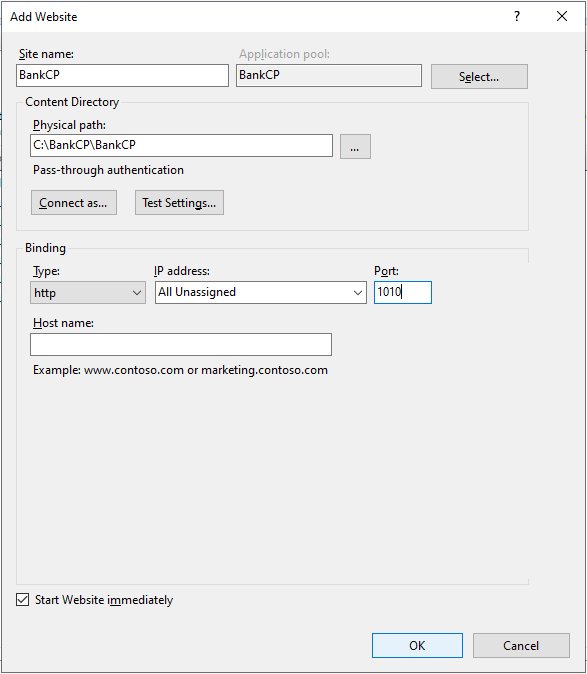
1. First you need to open IIS (Internet Information Services):



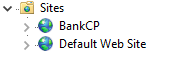
Right click on Sites and click on (Add Website…):  
  
  
  
you will see this window

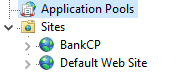


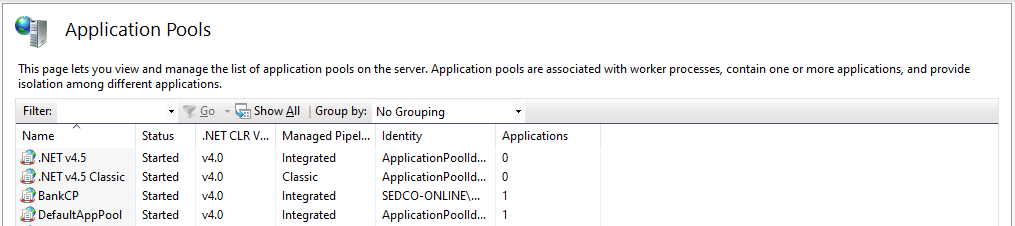
1. You need to fill data as explain below:
   1. Site name: the name of the web portal could be any name, in this manual we used (BankCP).
   2. Physical path: choose the path inside the file that called “BankCP”.
   3. Port: set up port number that is not used in any other website on your device, in this manual we used (1010).
   4. Click on (OK) to add the site.



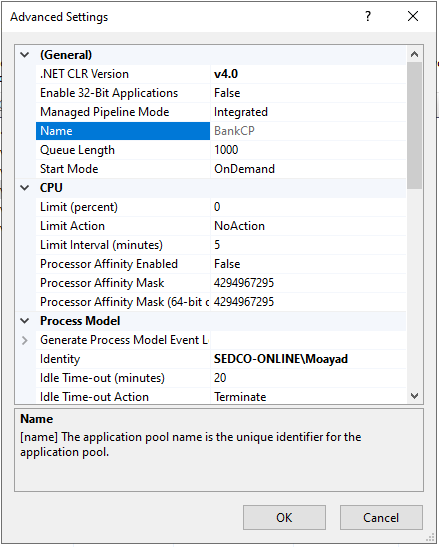
1. You will see the site you added in the left menu in the IIS home page:



1. If you have to sign in into your device you need to do (step 5), else just ignore this step.
2. Now we must update the application pool for the web portal that we host:
   1. Choose Application Pools from the left menu:  
        
       you will see this below screen



* 1. You will see application pool with the same name that you assign to the web portal before, here was (BankCP).
  2. Right-click on the application pool and click on the (Advanced Settings…),  
     you will see this below screen:



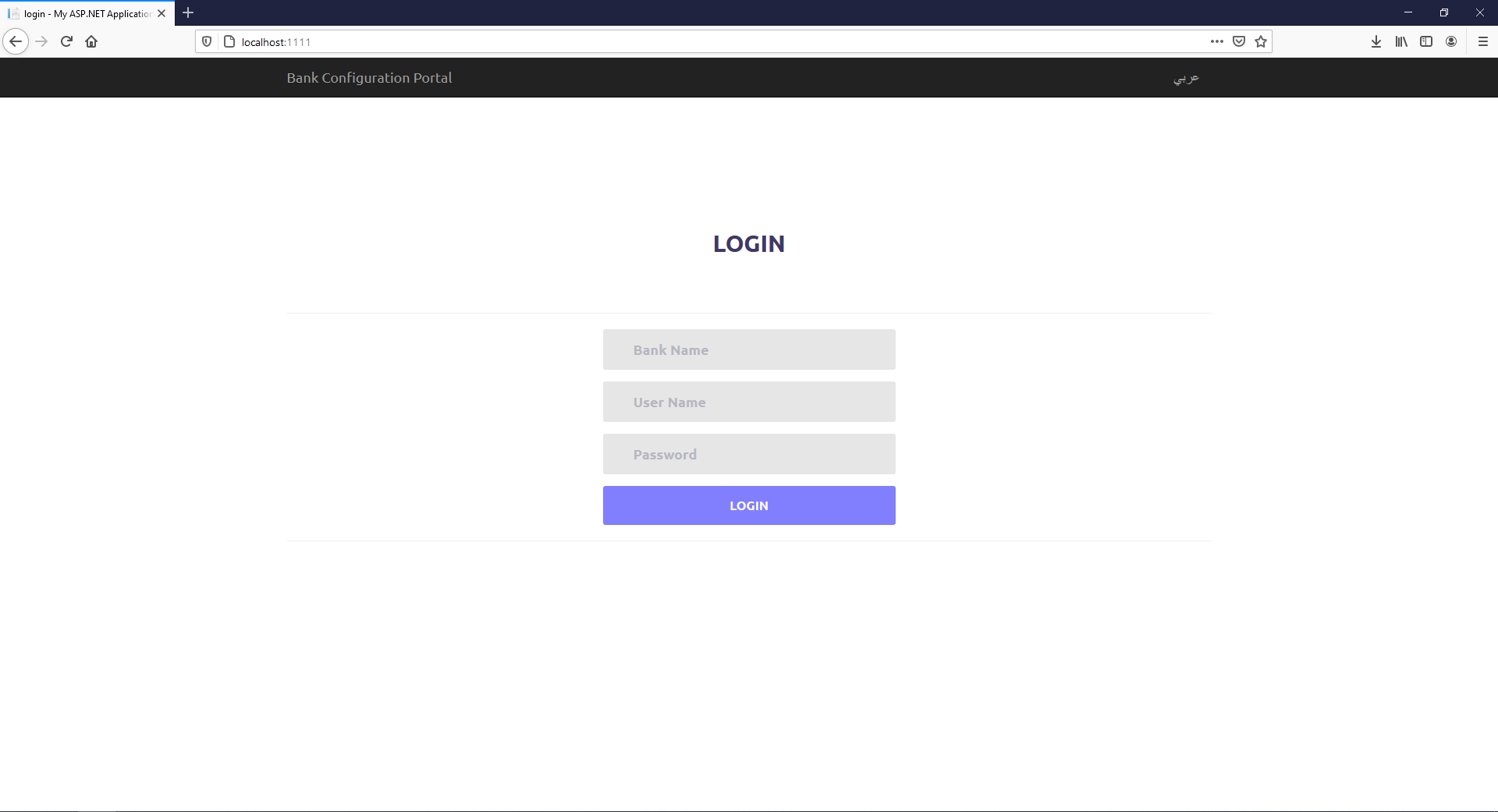
* 1. Now you need to change the Identity and set your username and password that you use to login to your device.

# User Interface

To open the web portal you need to choose your site from the left menu in the IIS and the click on browse website on the right menu of IIS.

## Login page

This page will display



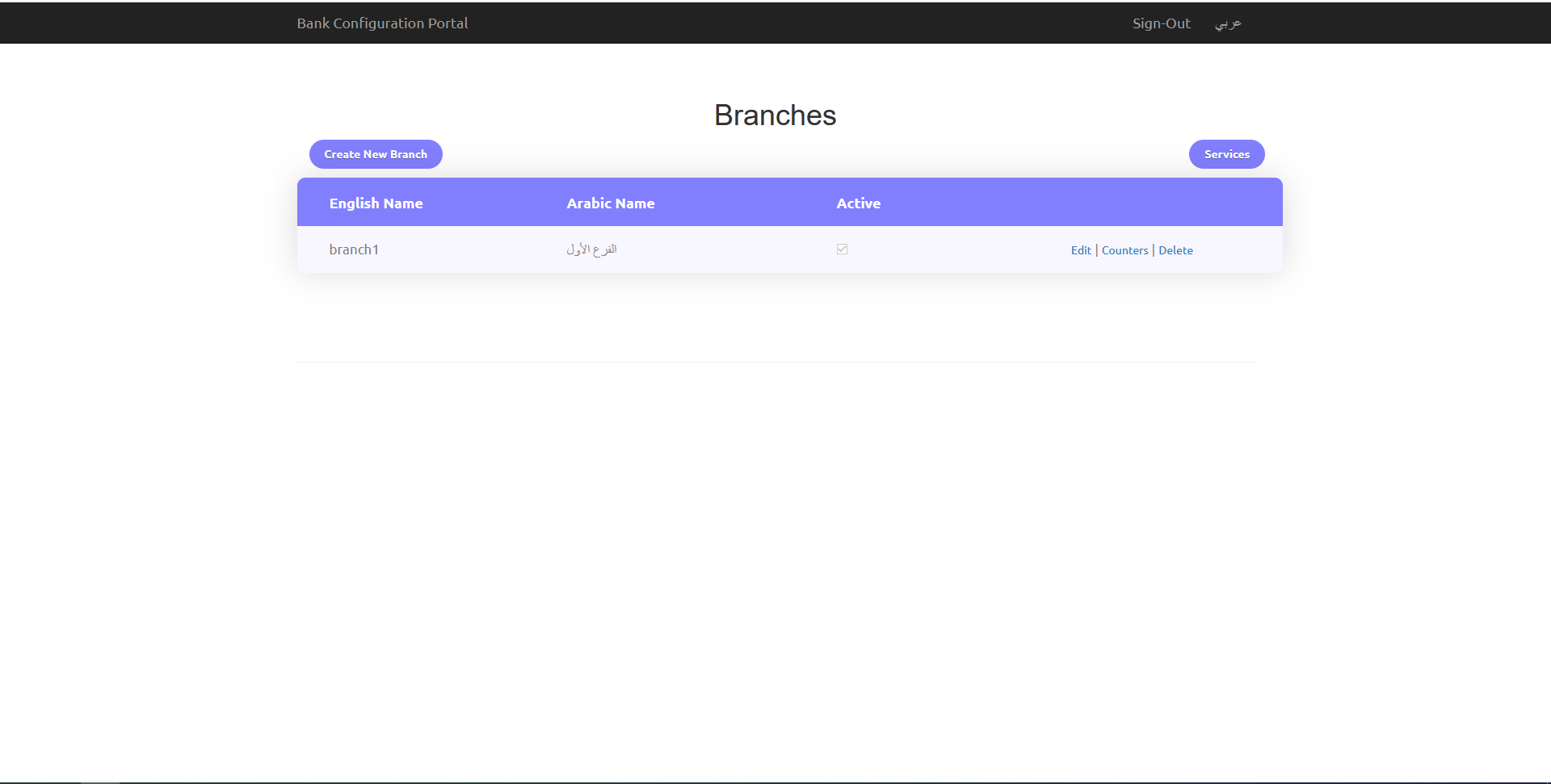
In this page you can:

1. *Login to bank by entering bank name and user information that you add to the bank before.*
2. *Changing language from English to Arabic and vice versa.*

## Branches Page

### Branches home

After entering the bank name, username and password it will redirect you to branches page as shown below:

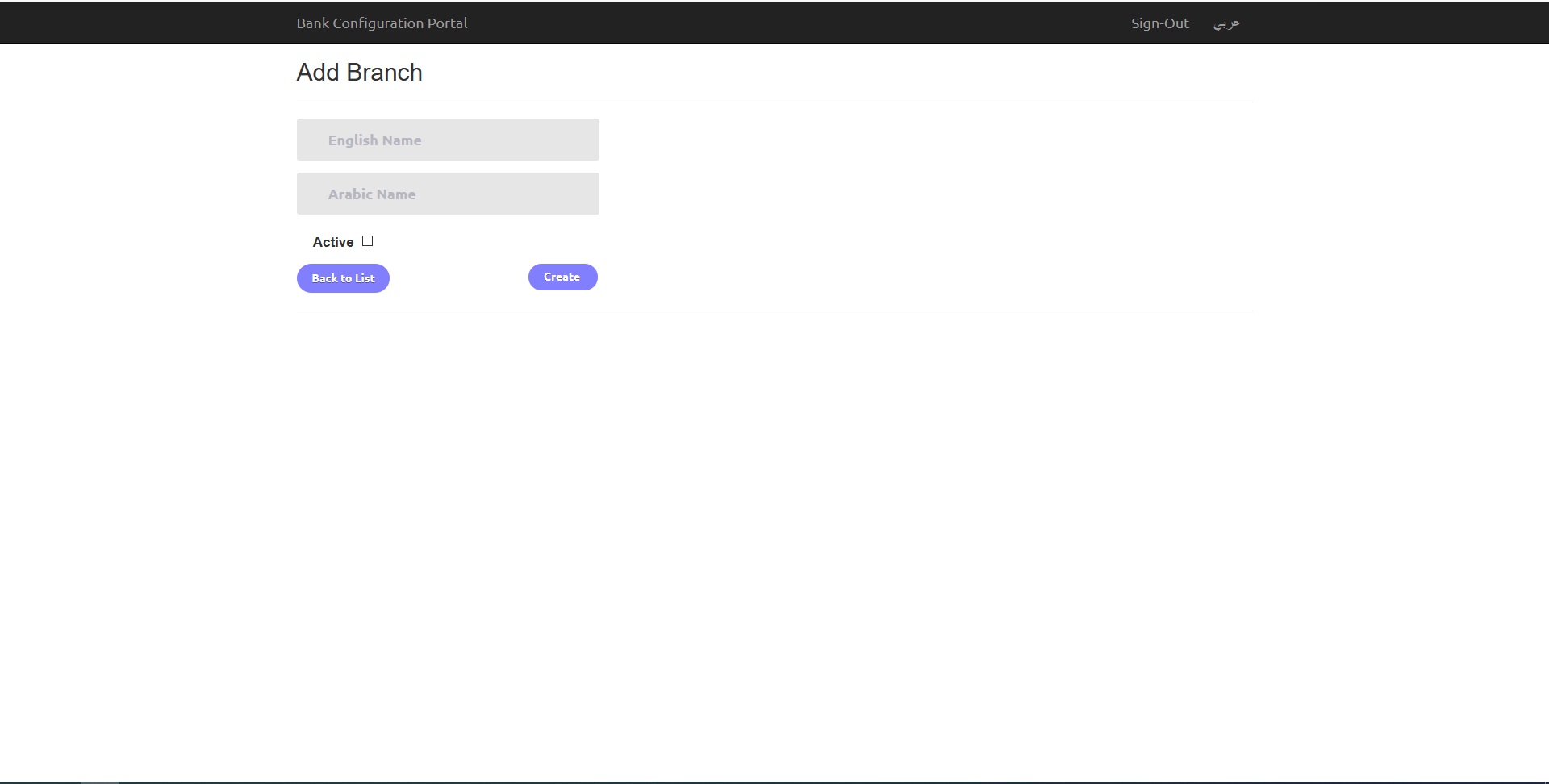


In this page you can:

1. See branches for the current bank.
2. Add new branch by clicking on (Create New Branch) link-button.
3. Edit existing branch by clicking on (Edit) link-button.
4. Delete existing branch by clicking on (Delete) link-button.
5. Add counters to existing branch by clicking on (Counters) link-button.
6. Add services for the current bank by clicking on (Services) link-button.

### Add branch page

After click on (create new branch) link-button it will redirect you to add branch page as shown below:

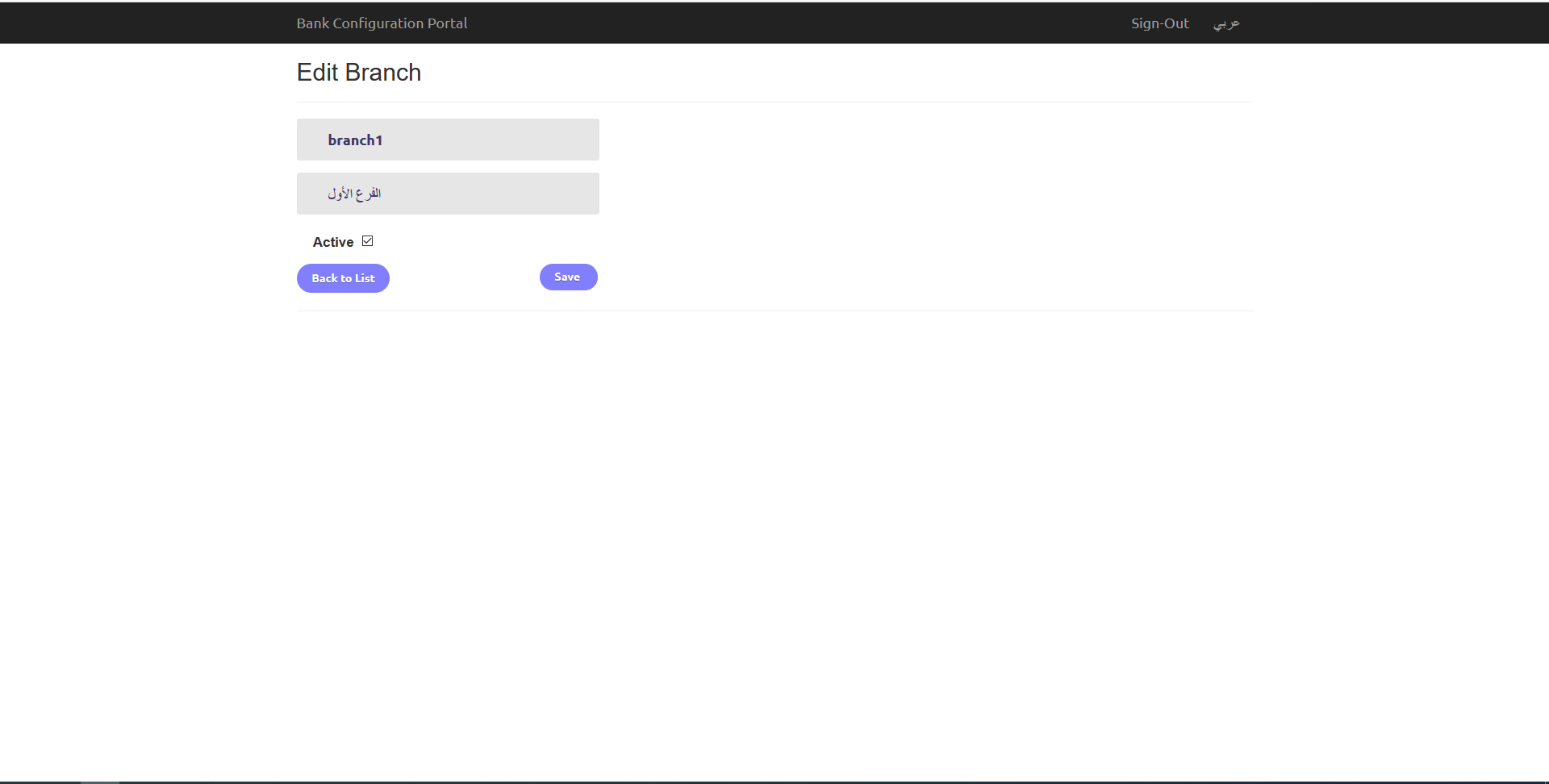


In this page you can:

1. You can add branch information and click on (Create) link-button to add new branch.
2. You can go back to branches page by clicking on (Back to List) link-button.

### Edit branch page

After click on (Edit) link-button it will redirect you to edit branch page as shown below:



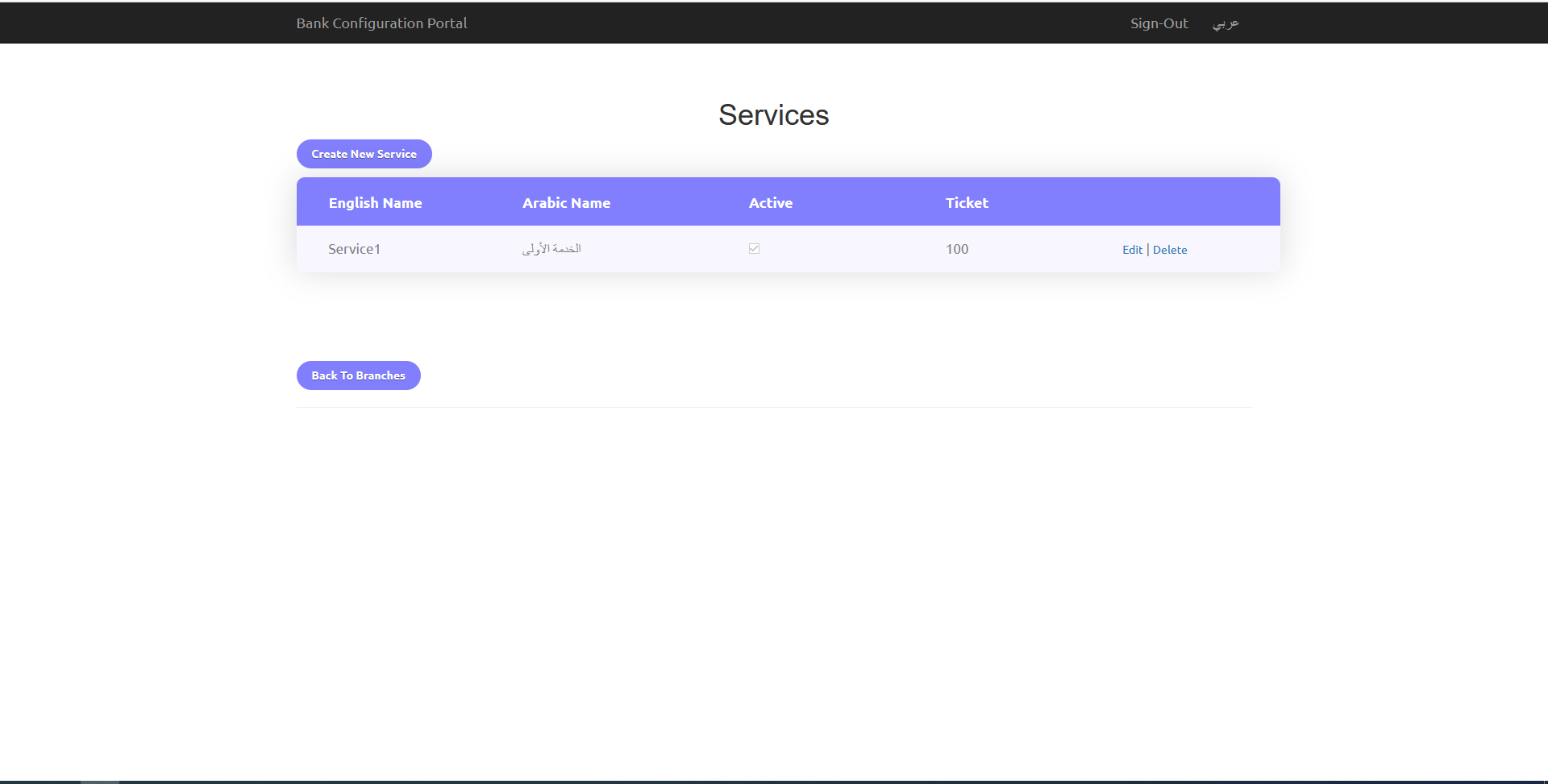
In this page you can:

1. You can edit branch information and click on (Save) link-button to edit selected branch.
2. You can go back to branches page by clicking on (Back to List) link-button.

## Services Page

### Services home

After you clicking on (Services) button-link it will redirect you to services page as shown below:

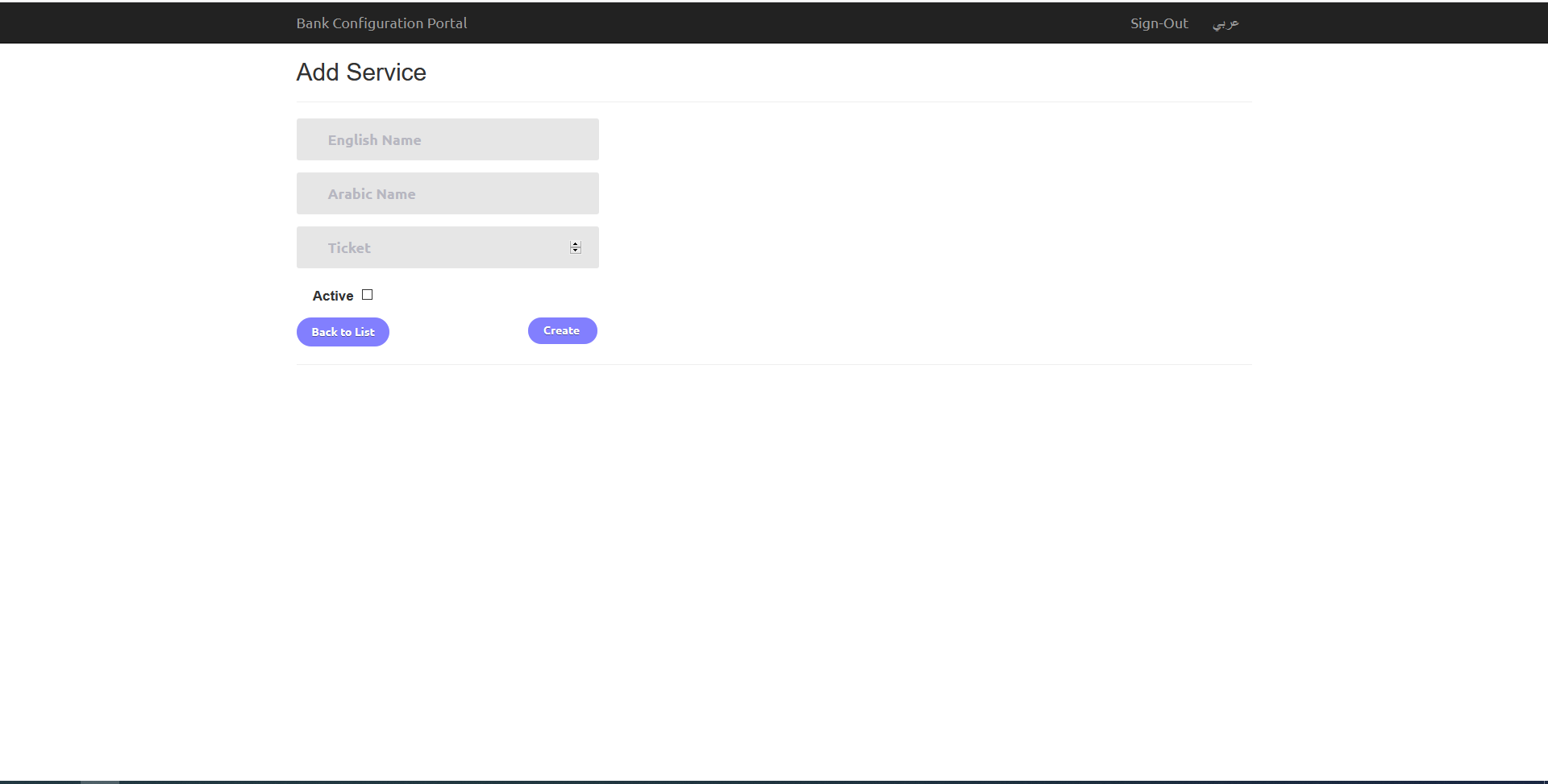


In this page you can:

1. See services for the current bank.
2. Add new service by clicking on (Create New Service) link-button.
3. Edit existing service by clicking on (Edit) link-button.
4. Delete existing service by clicking on (Delete) link-button.
5. You can go back to branch page by clicking on (Back to Branches) link-button.

### Add service page

After click on (create new service) link-button it will redirect you to add service page as shown below:

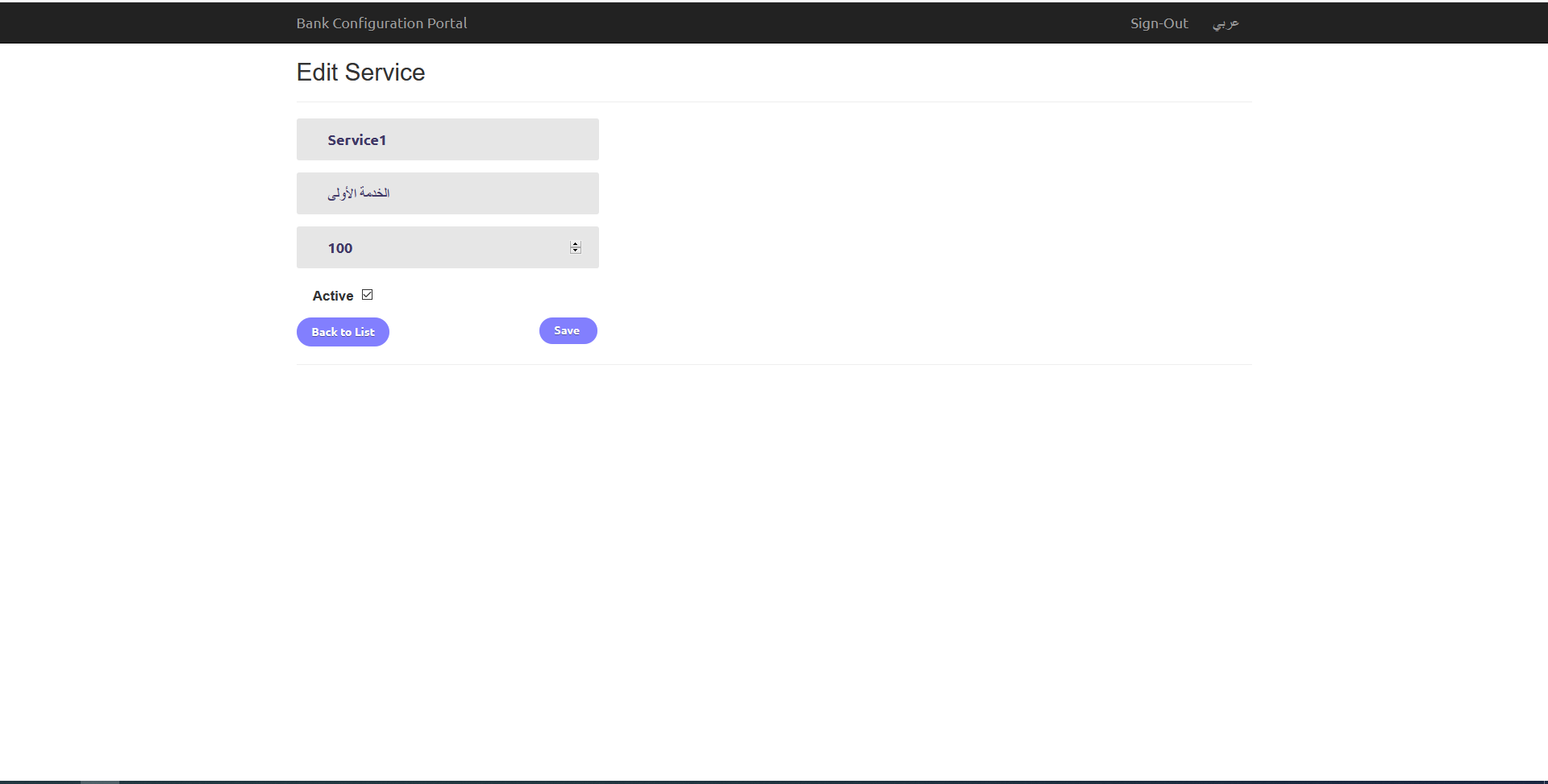


In this page you can:

1. You can add service information and click on (Create) link-button to add new service.
2. You can go back to services page by clicking on (Back to List) link-button.

### Edit service page

After click on (Edit) link-button it will redirect you to edit service page as shown below:



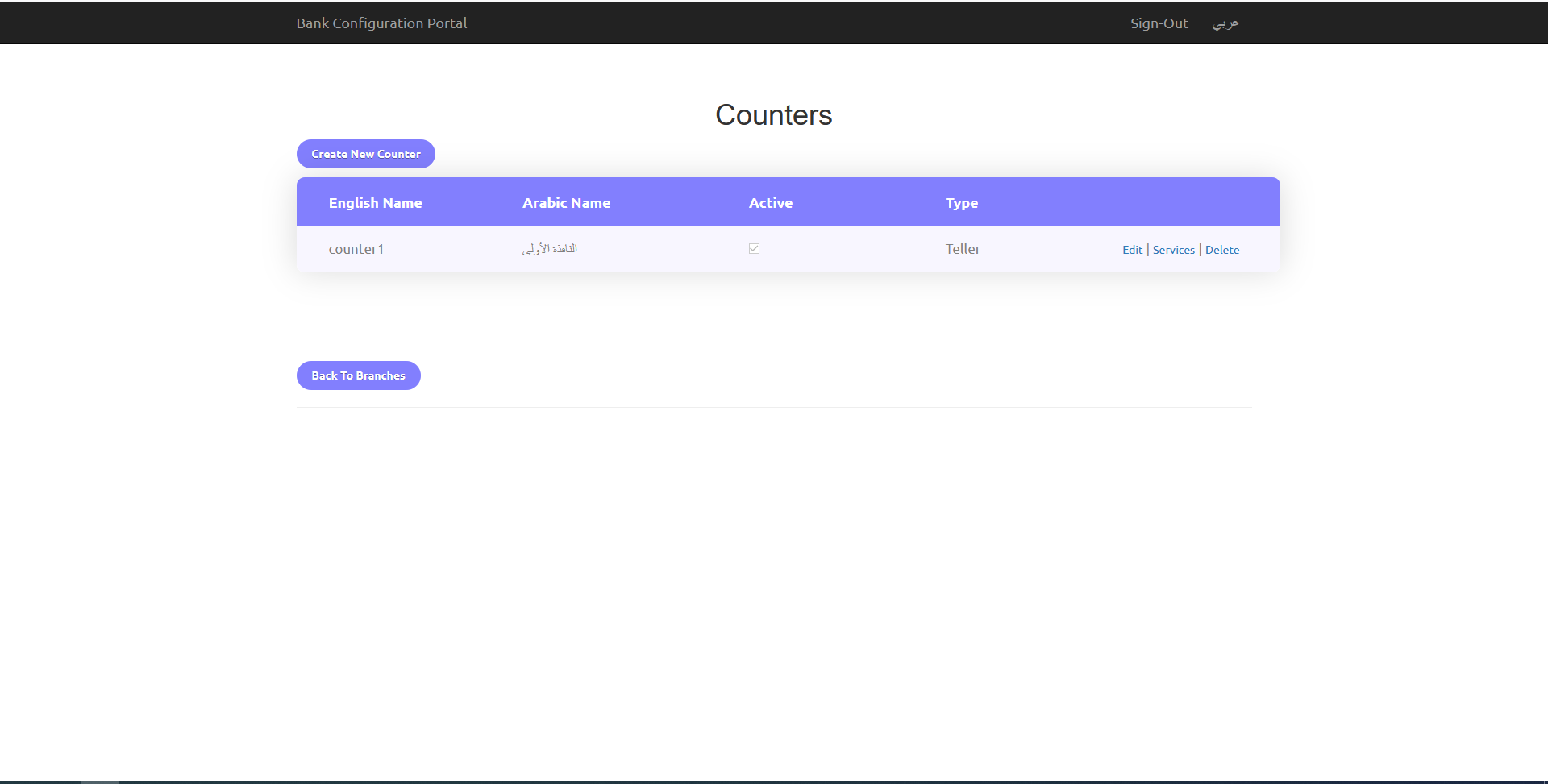
In this page you can:

1. You can edit service information and click on (Save) link-button to edit selected service.
2. You can go back to services page by clicking on (Back to List) link-button.

## Counters Page

### Counters home

After you clicking on (Counters) button-link for existing branch it will redirect you to counters page as shown below:

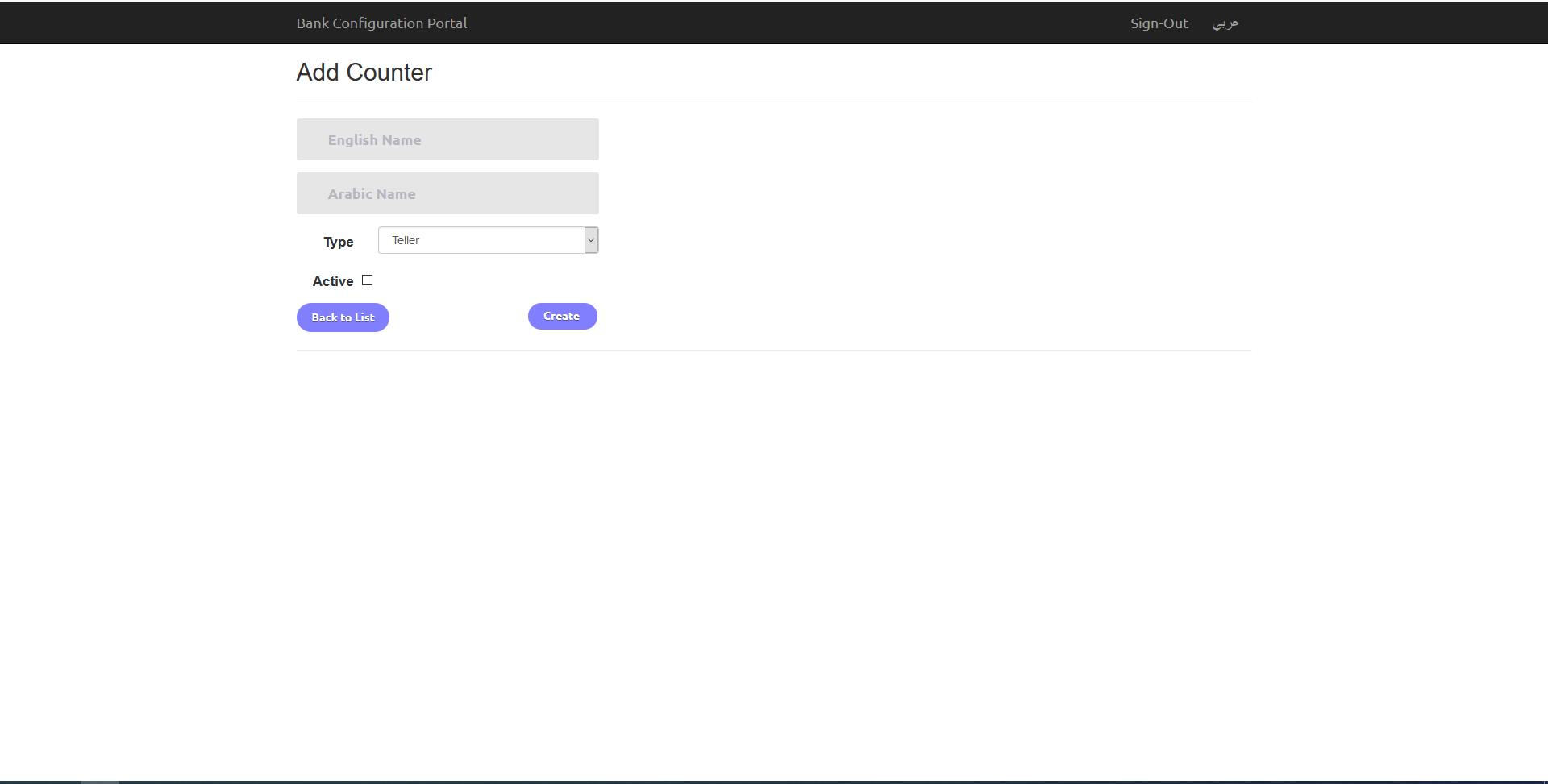


In this page you can:

1. See counters for the selected branch.
2. Add new counter by clicking on (Create New Counter) link-button.
3. Edit existing counter by clicking on (Edit) link-button.
4. Delete existing counter by clicking on (Delete) link-button.
5. You can allocate services to counter by clicking on (Services) link-button.
6. You can go back to branches page by clicking on (Back to Branches) link-button.

### Add counter page

After click on (create new counter) link-button it will redirect you to add counter page as shown below:

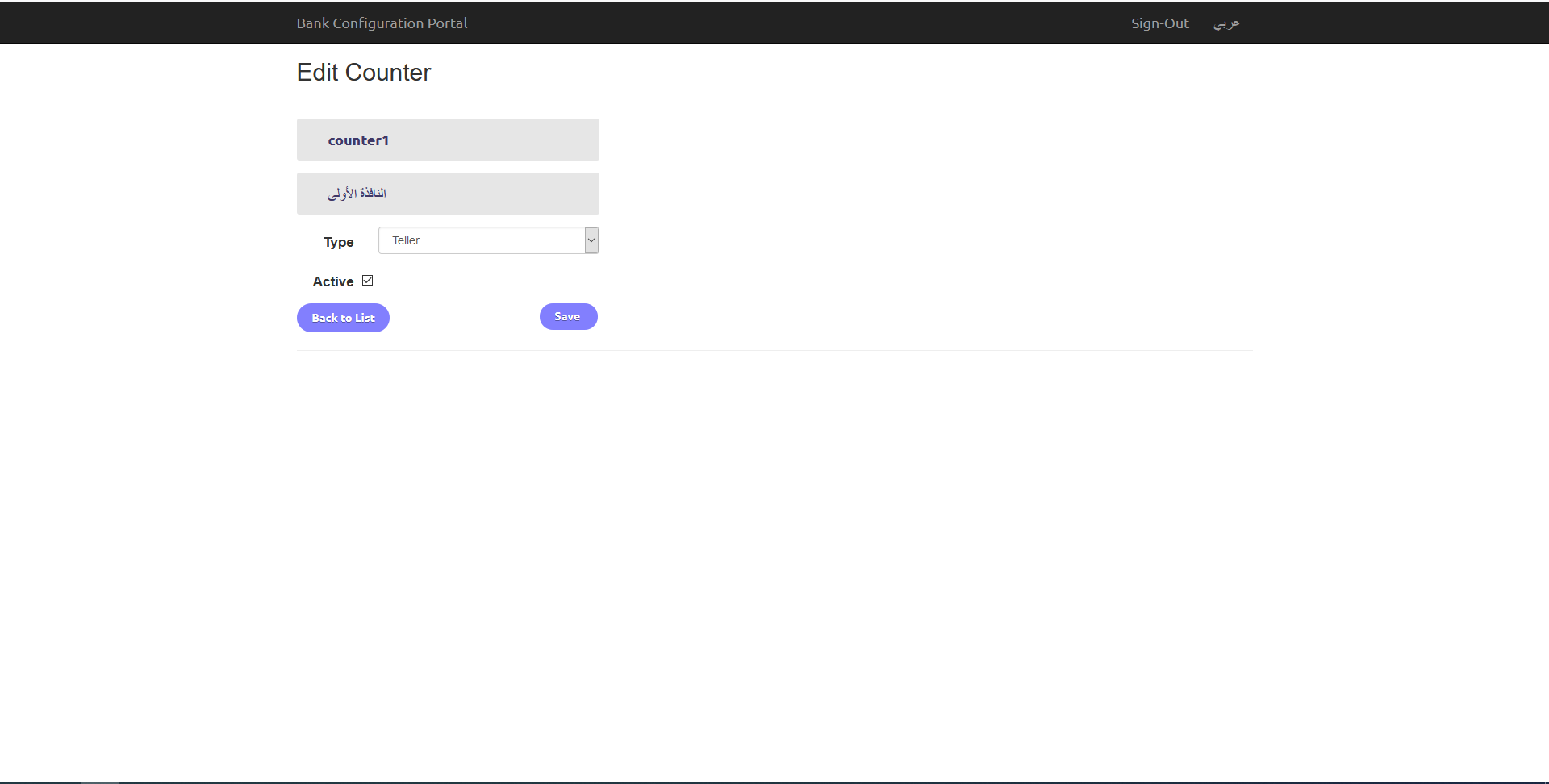


In this page you can:

1. You can add counter information and click on (Create) link-button to add new counter.
2. You can go back to counters page by clicking on (Back to List) link-button.

### Edit counter page

After click on (Edit) link-button it will redirect you to edit counter page as shown below:

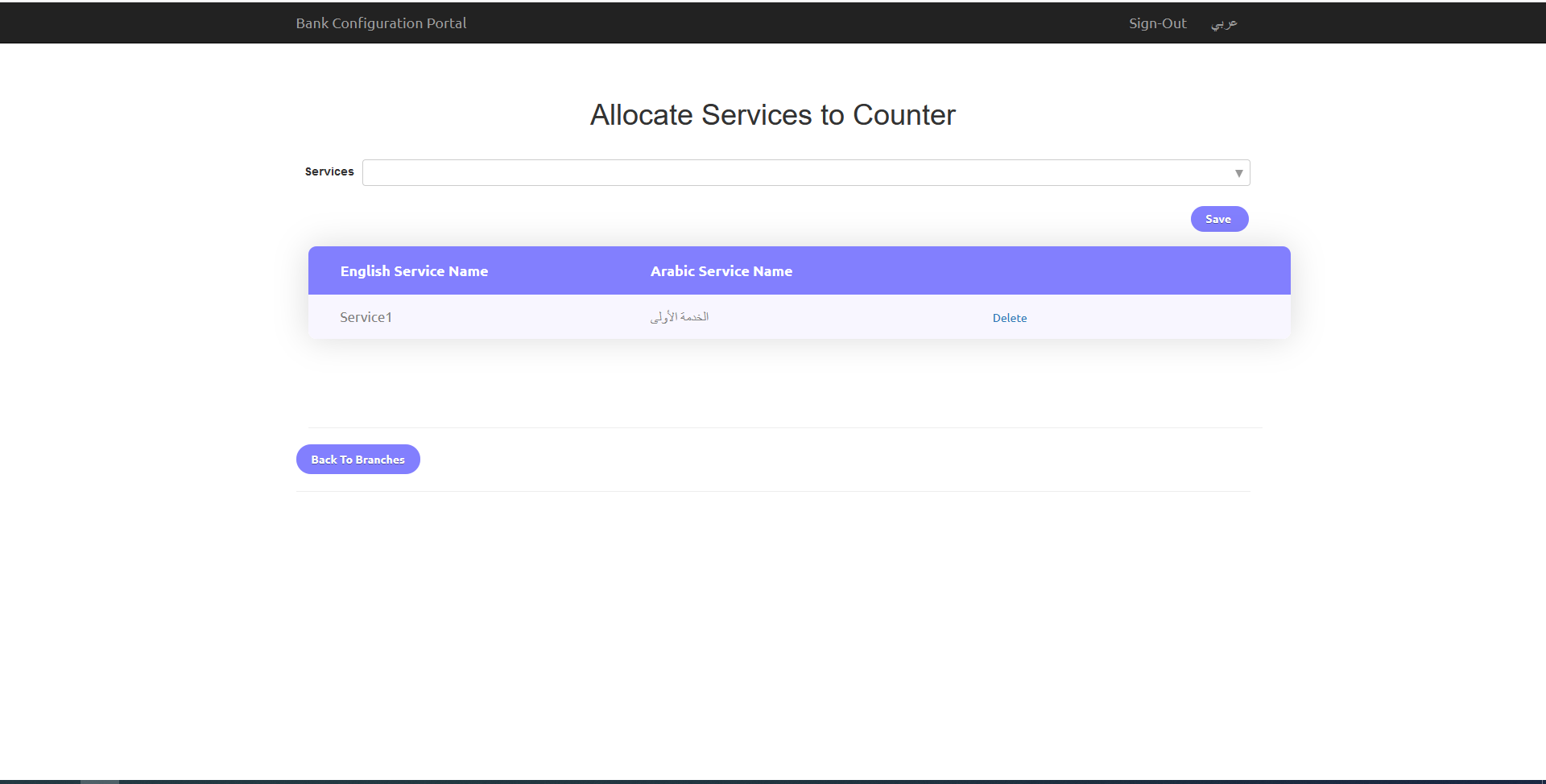


In this page you can:

1. You can edit counter information and click on (Save) link-button to edit selected counter.
2. You can go back to counters page by clicking on (Back to List) link-button.

## Allocate Services to Counter Page

After you clicking on (Services) button-link for existing counter it will redirect you to allocate services to counter page as shown below:



In this page you can:

1. See services that allocated to selected counter.
2. Allocate services to selected counter:
   1. Select services that you want to allocated them to selected counter  
      (multi-selection).
   2. Click on (Save) link-button to allocated selected services to the counter.
3. You can go back to branches page by clicking on (Back To Branches) link-button.
4. You can delete allocated service by clicking on (Delete) link-button.

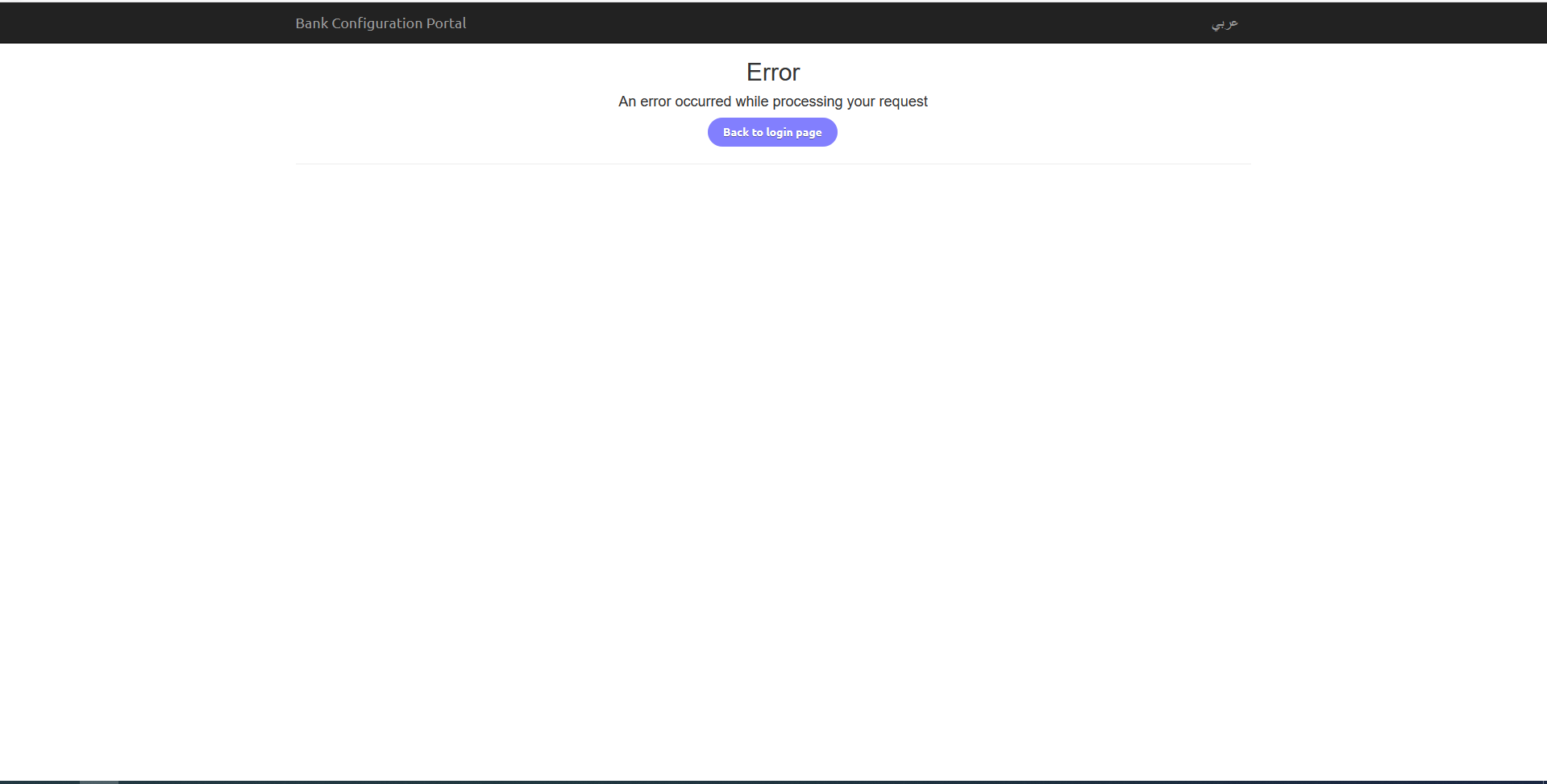
## General Features

1. You can sign-out from any page if you where logged-in.
2. You can change web portal language from English to Arabic and vice versa from any page in the site.
3. You can go back to branch page which it the main page by clicking on the name of the site  
   in the header.

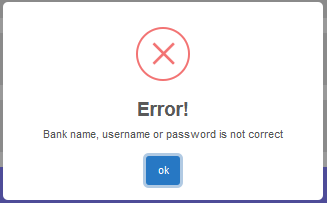
# Warnings

## Warning that maybe occurred

* If this warning shows up you must check your connection to database is right.



* If this warning shows up you must check your username, password and bank name is right.



Bank Configuration Portal manual

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