Bank Configuration Portal – User manual

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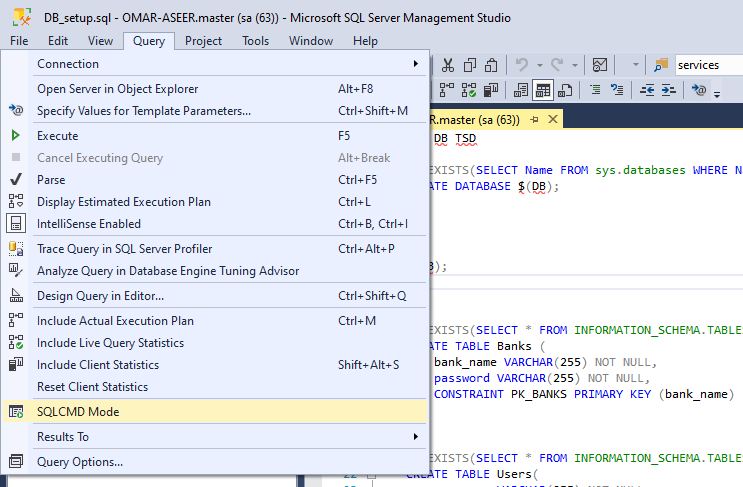
[Language 17](#_Toc148966090)

# First time setup

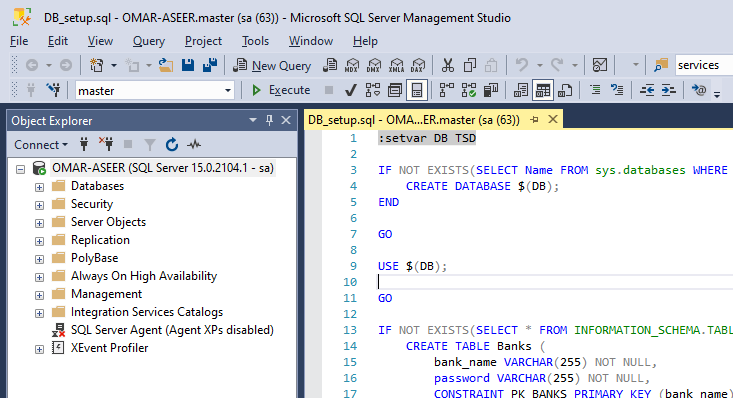
## Database setup

First time setup requires SQL Server Management Studio (SSMS) to be installed on your machine.

Open the file named "DB\_setup.sql" using SSMS, then open the "Query" menu in the menu bar, and click "SQLCMD Mode".

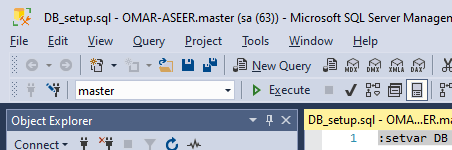


Make sure you’re on the master database, then click "Execute".

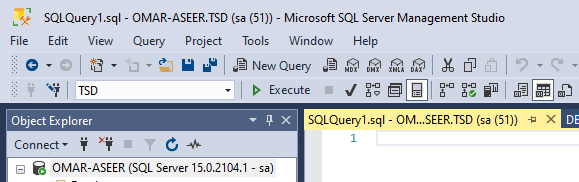


## Registering new users

Registering new users can be done manually using SSMS. Open SSMS and create a new query.



Once you create the query, make sure that it is set to execute on the correct database (TSD by default).



Paste or type the following query into the main window:

INSERT INTO Users (username, password, bank\_name) VALUES ('your\_username', 'your\_password', 'your\_bank\_name');

Replace the red text with the desired values. Make sure you keep the single quotes.

For example, to create a user with the username "Omar", the password "pass1", and the bank "bank1", the query should look like this:

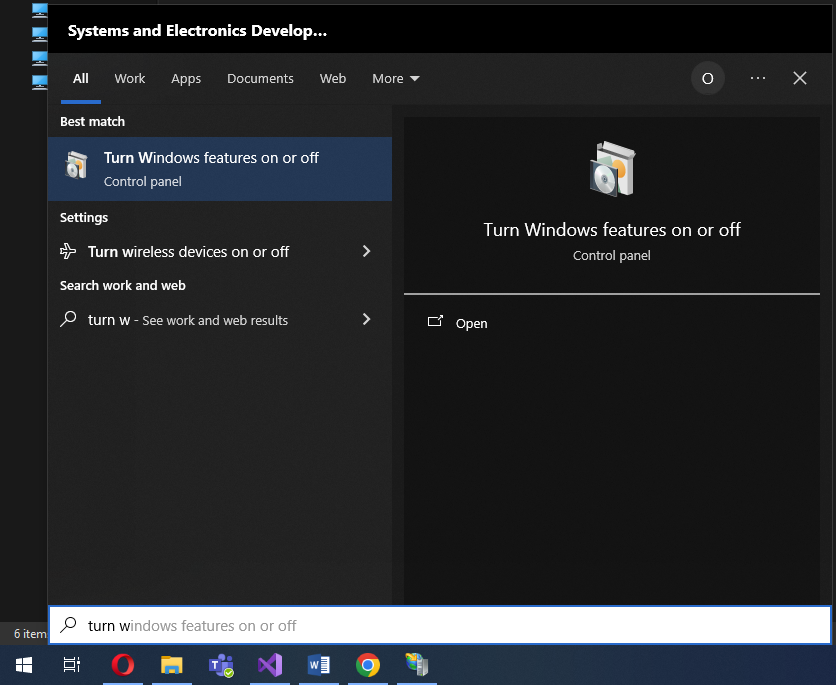
INSERT INTO Users (username, password, bank\_name) VALUES ('Omar', 'pass1', 'bank1');

## Deploying the application using IIS

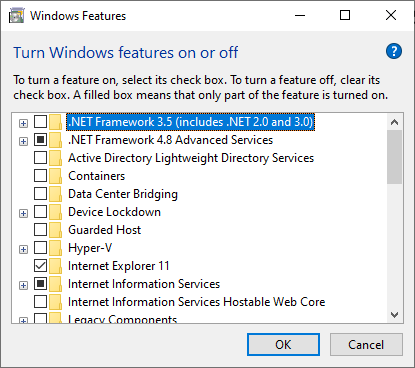
### IIS Installation

In order to deploy the application, you need to have Internet Information Services (IIS) installed on your machine. Follow the steps below to install it. Note that you need administrator permissions to install IIS.

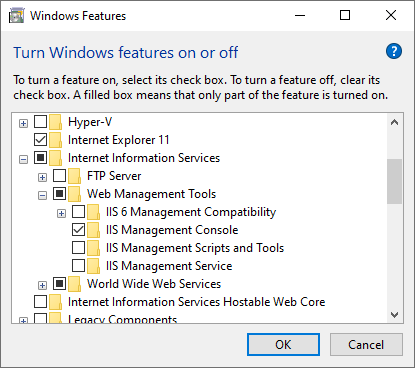
1. Open the start menu and search for "Turn Windows features on or off".



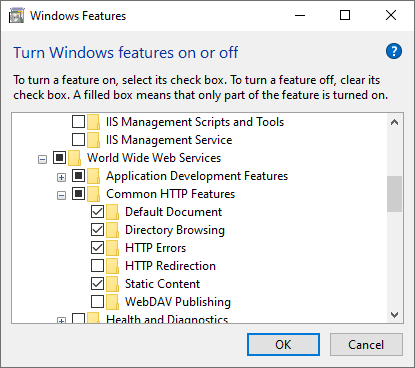
1. Once the window is open, scroll to "Internet Information Services" and expand it using the + sign.



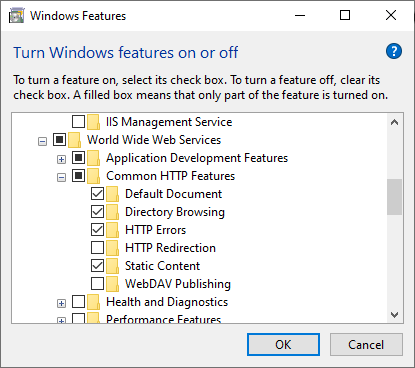
1. Expand "Web Management Tools", and make sure "IIS Management Console is checked.



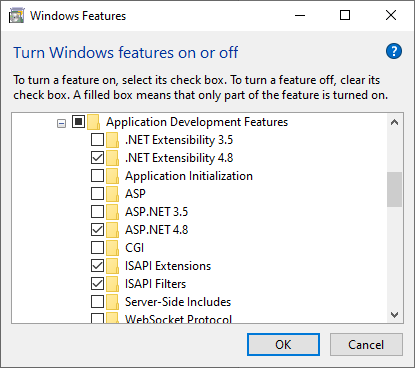
1. Expand "World Wide Web Services" then expand "Common HTTP features".



1. Make sure that "Default Document", "Directory Browsing", "HTTP Errors" and "Static Content" are checked.



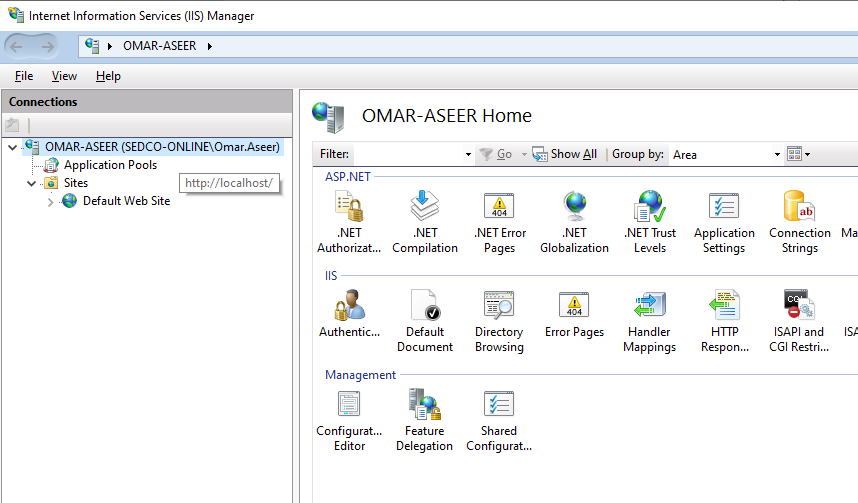
1. Expand "Application Development Features" and make sure ".NET Extensibility 4.8" and "ASP.NET 4.8" are checked.



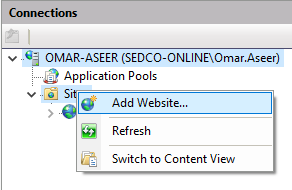
1. Click "OK", and wait for Windows to install the features. If prompted, reboot your machine.

### Deployment

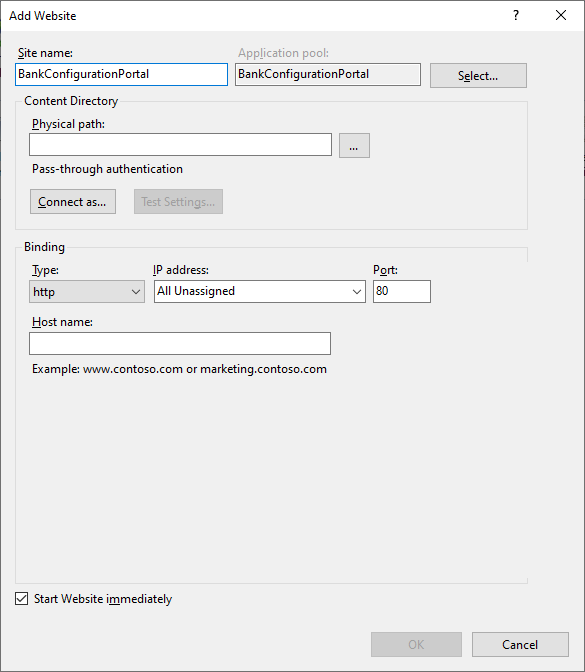
1. Copy the folder named "BankConfigurationPortal - Release" into "C:\inetpub\wwwroot".
2. Open IIS Manager and expand your localhost entry in the "Connections" panel.



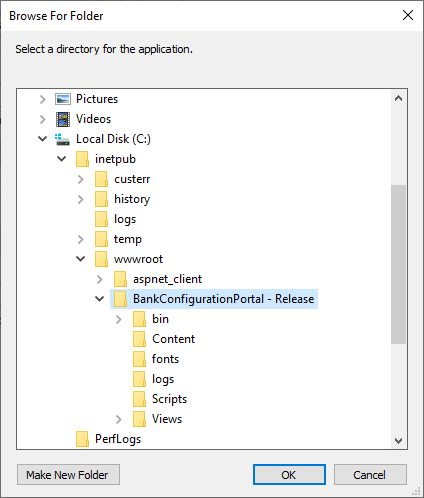
1. Right-click "Sites", and click "Add Website…".



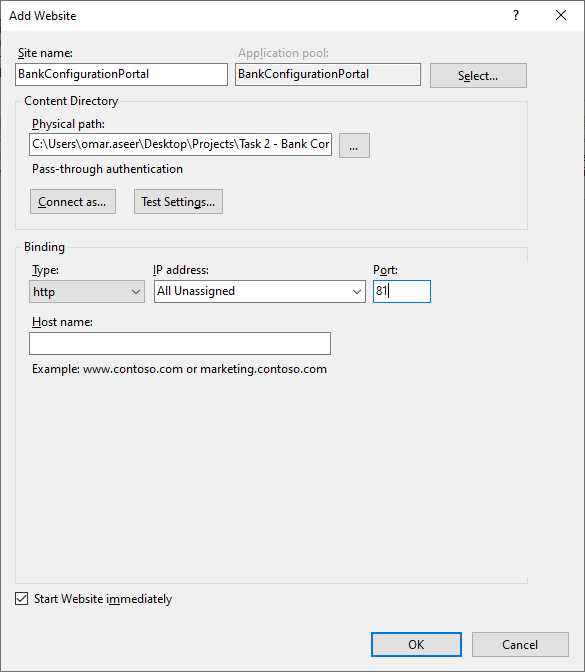
1. Type in the name of the application in the form, then click on the ellipses (…) next to the "Physical path" text box.



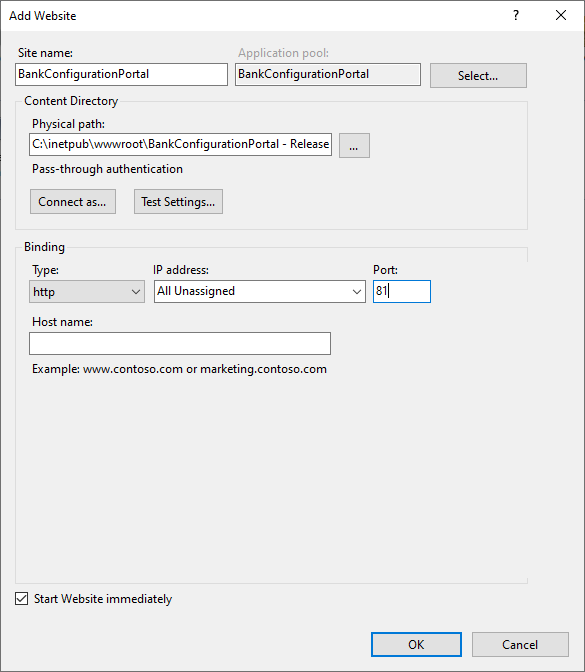
1. Browse for the folder named "BankConfigurationPortal - Release" and select it, then click "OK".



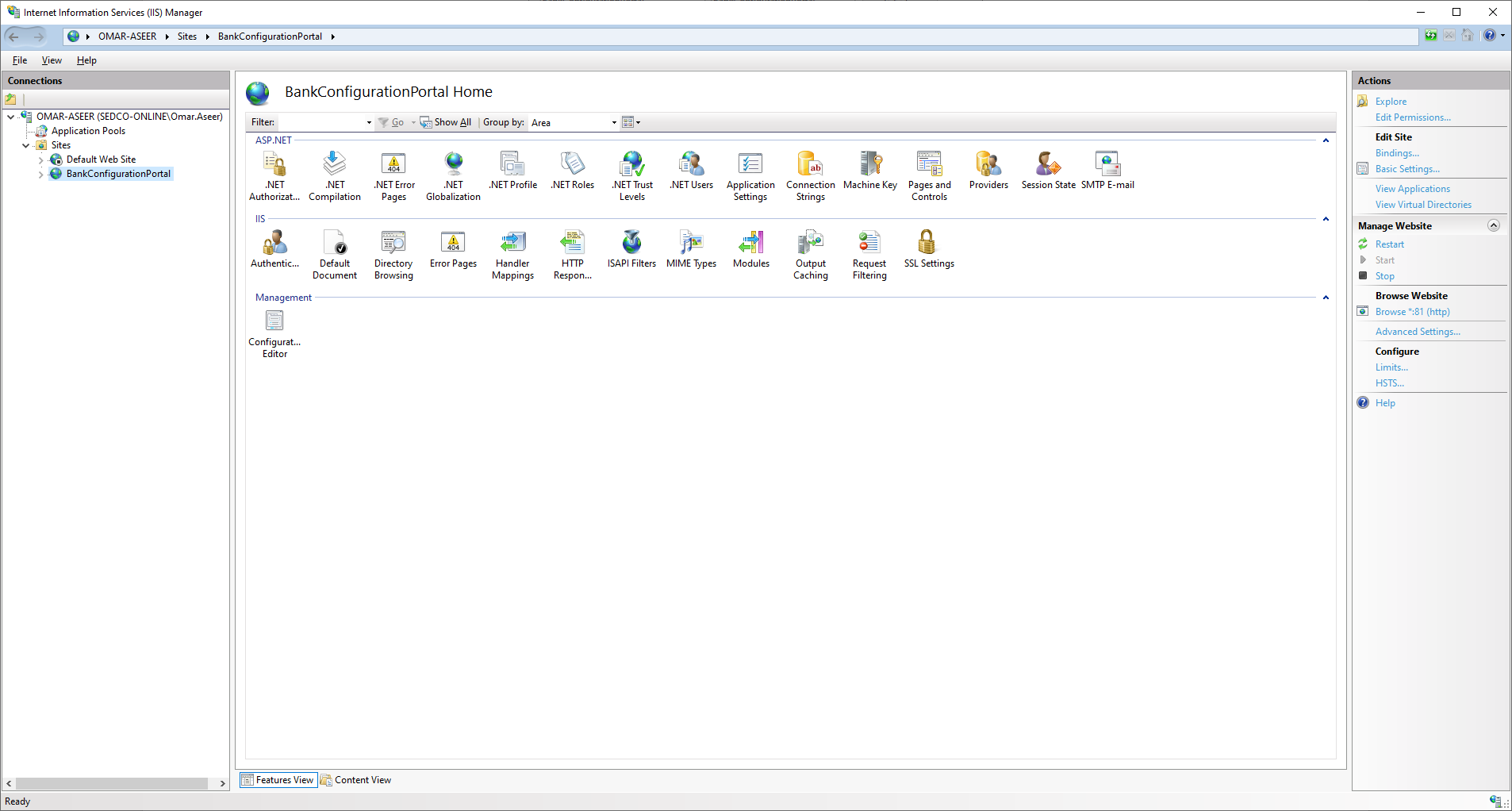
1. Choose a port for the website. Port 80 is usually taken as the port for the default website in IIS, so this example chooses port 81.



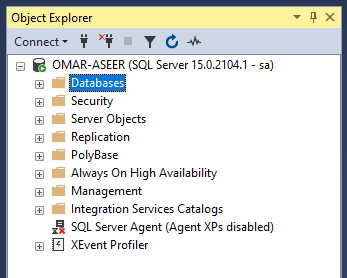
1. Click "OK".



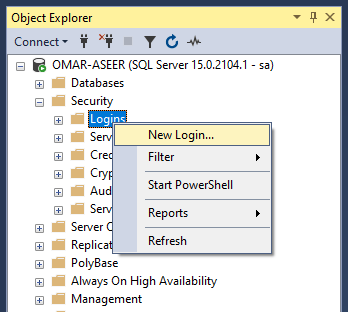
1. You should be able to see the newly added website in the list on the "Connections" panel.



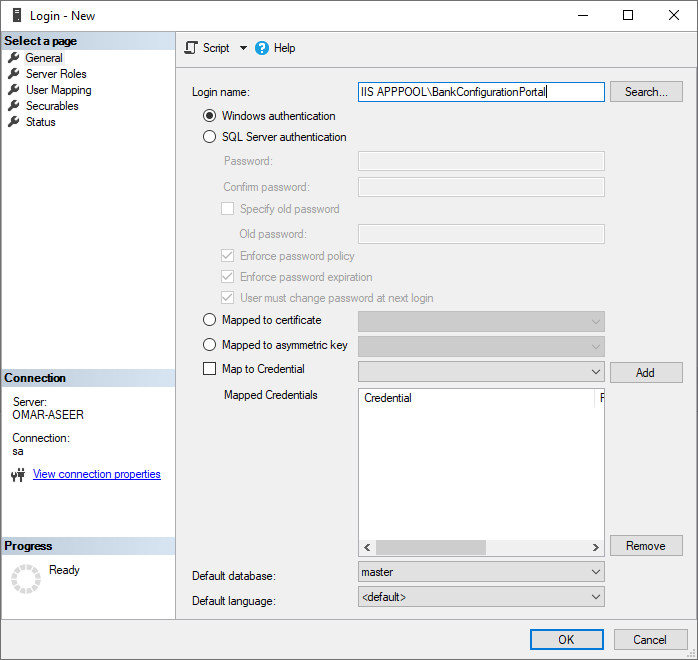
1. Open SSMS and connect to your server.
2. In the "Object explorer", Expand the "Security" node by clicking the + sign.



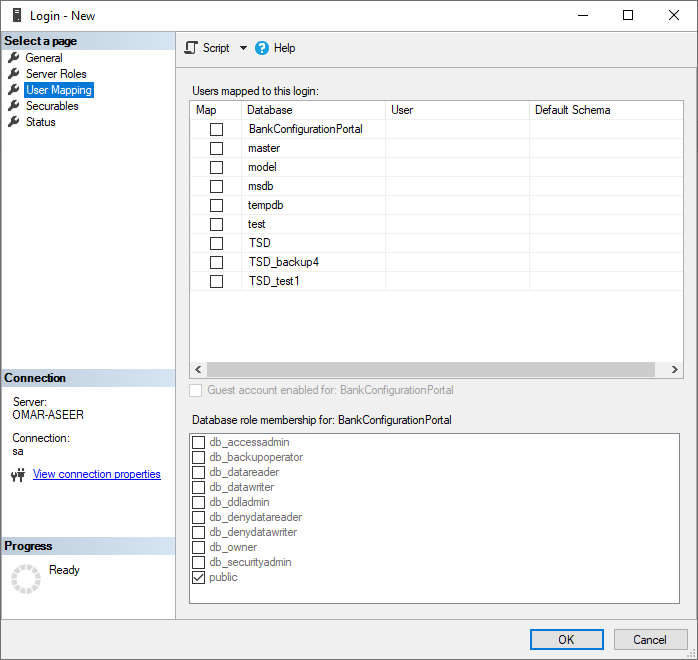
1. Under the "Security" node, you will find a node named "Logins". Right-click it, then click "New Login…".



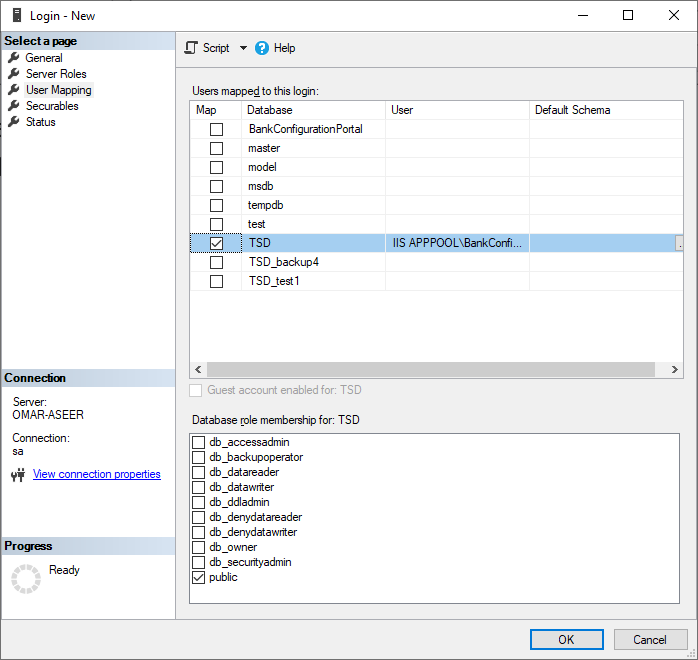
1. In the "Login - New" window, type "IIS APPPOOL\<your website name>" into the "Login name" text box. Replace "<your website name>" with the name of the application you chose in step 4.



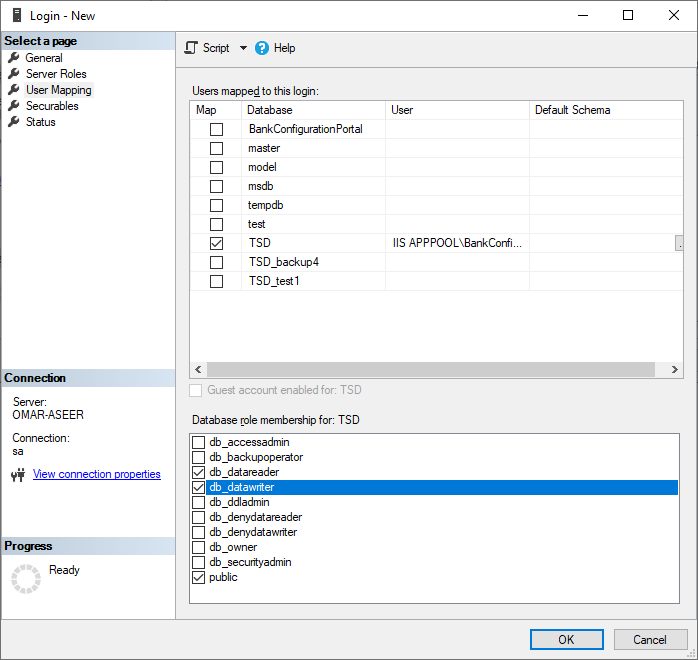
1. Click "User Mapping" in the left side panel.



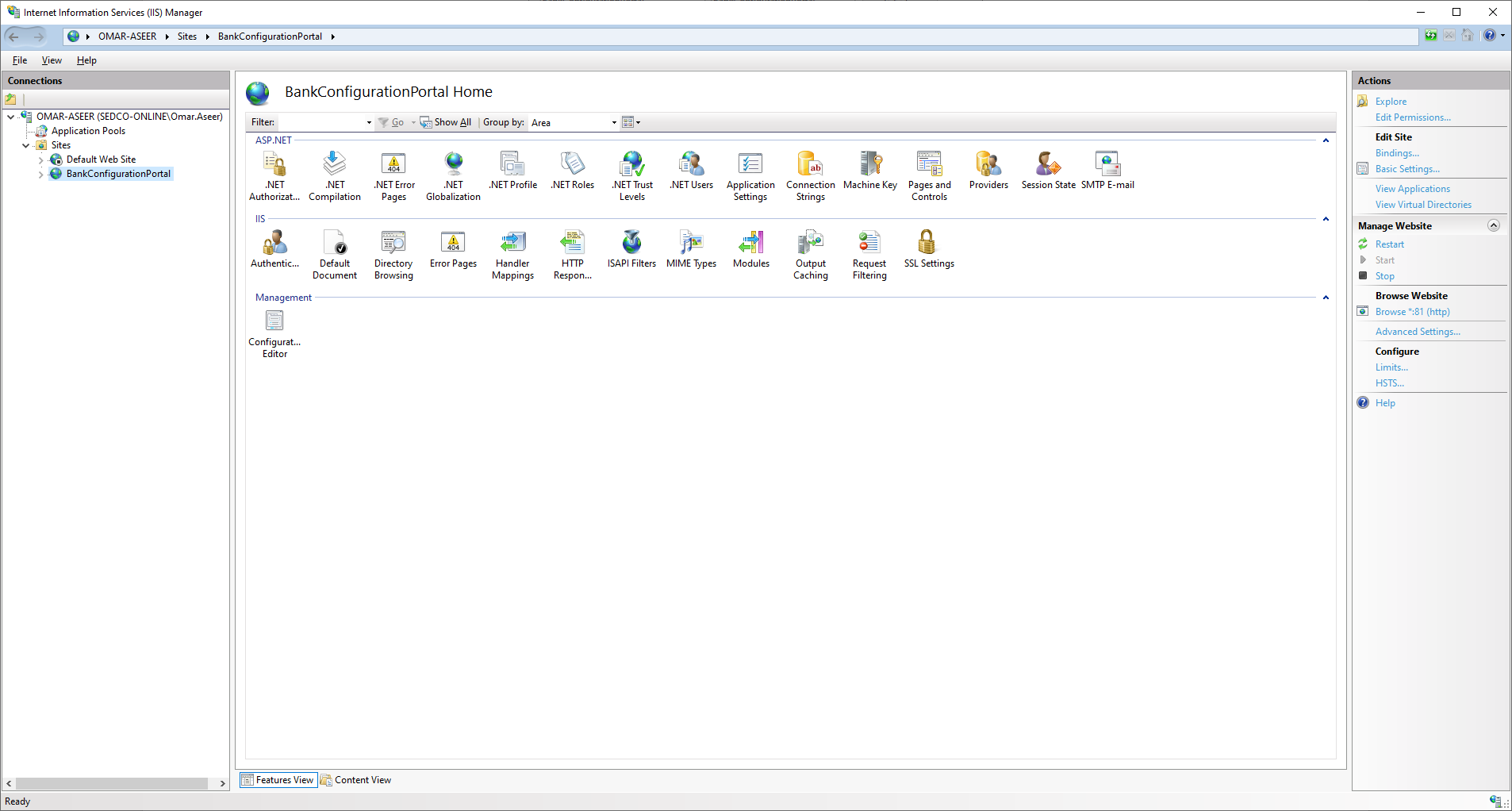
1. Locate the name of the database you created during database setup ('TSD' by default), and make sure the "Map" textbox next to it is checked.



1. In the bottom panel, check "db\_datareader" and "db\_datawriter".



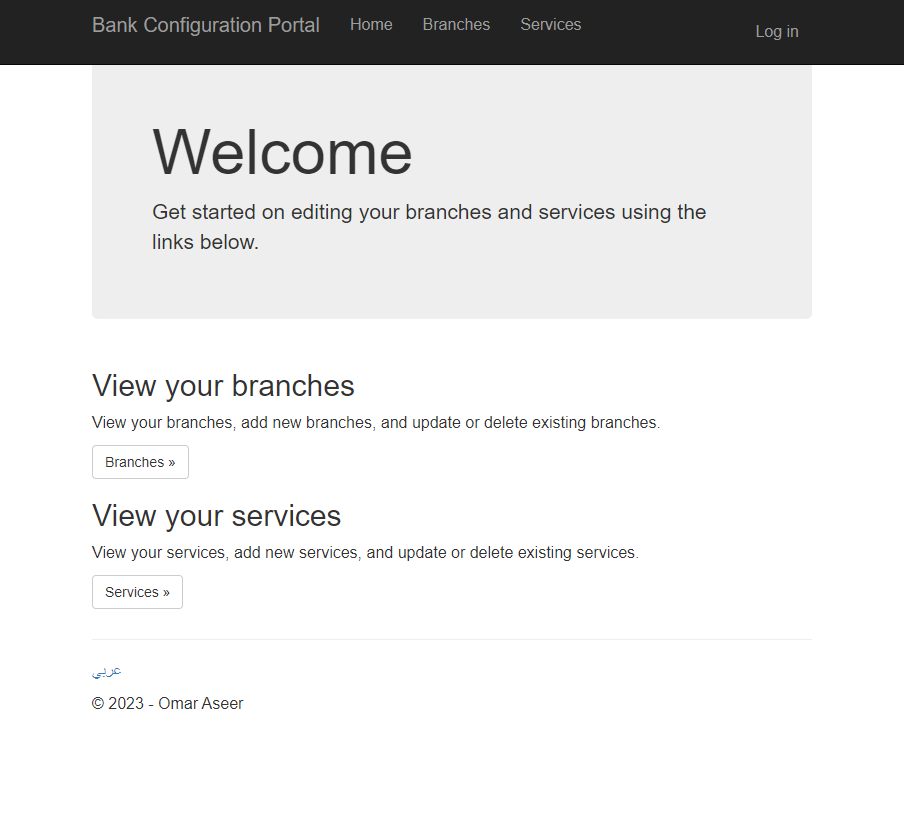
1. Click "OK".
2. Back in IIS Manager, select the website if it is not already selected, then, in the "Actions" panel on the right side, click "Browse \*:81 (http)". If you picked a different port number, you should be able to see that port number instead of 81.



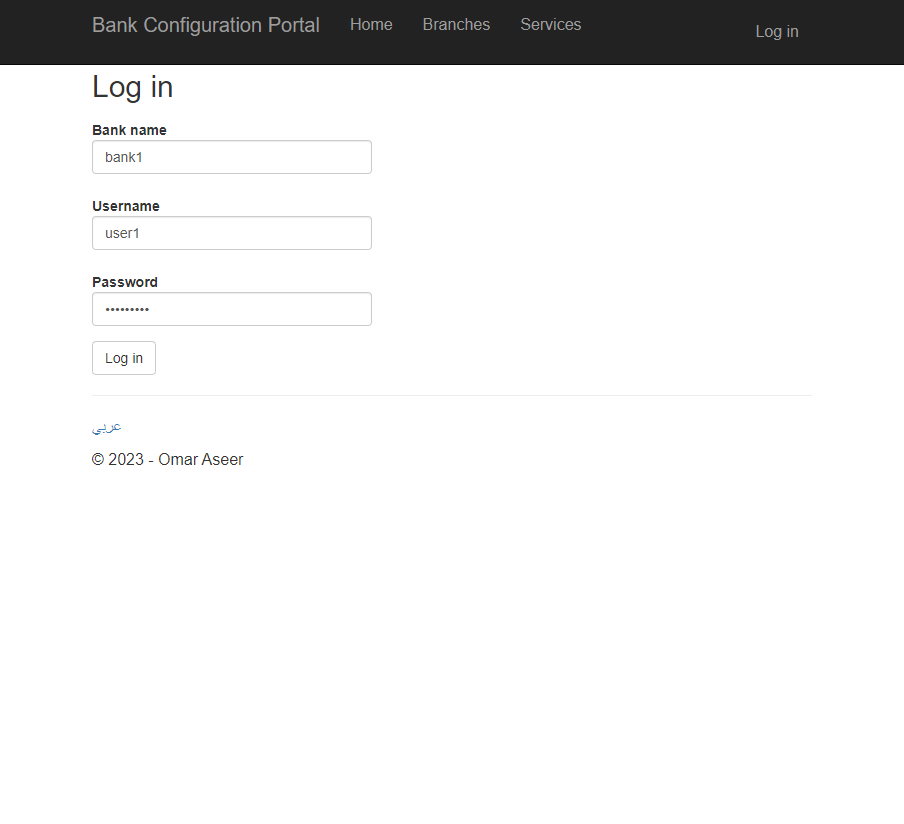
1. The website will now be opened in your default browser.

# Login

To perform any actions, you need to log in.



Enter the name of your bank, your username, and your password, then click "Log in".

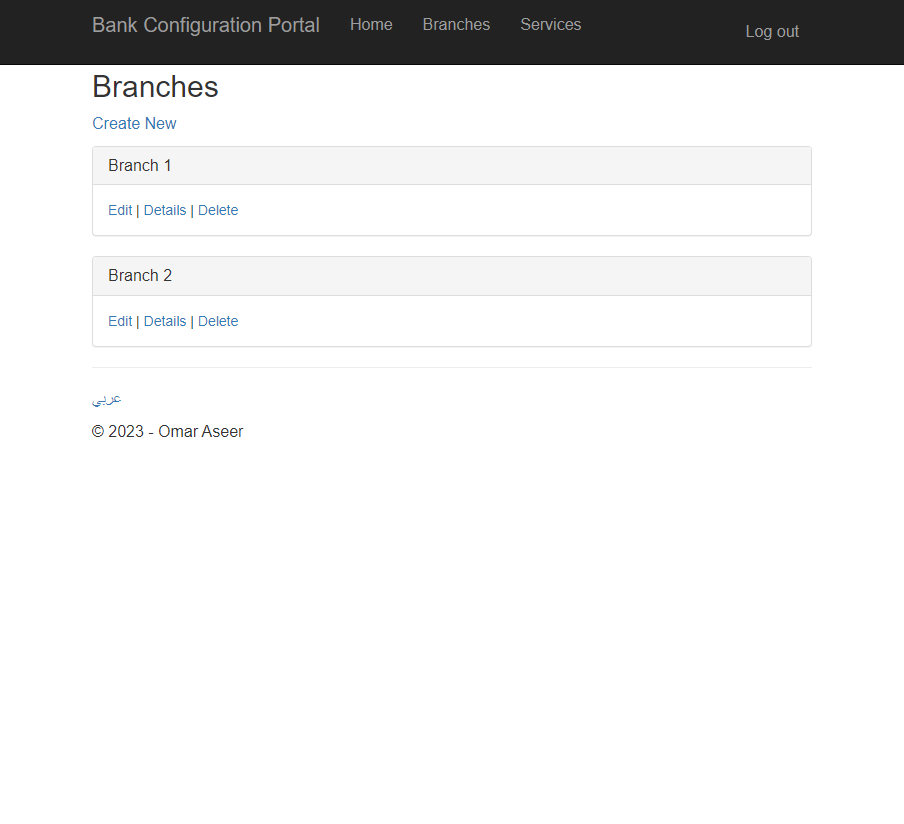


# Branches

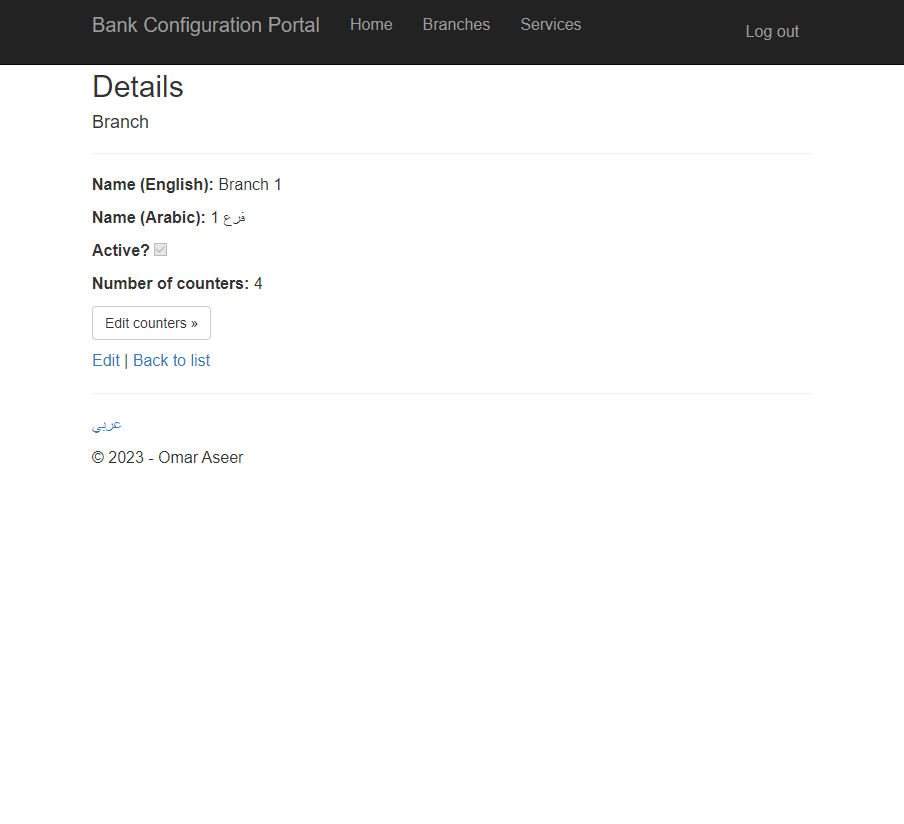
Once you’re logged in, you can view, edit, and delete existing branches, and you can create new branches. Click the link in the navigation bar, or the button on the home page.



Follow the links on screen to edit, delete, or create branches.

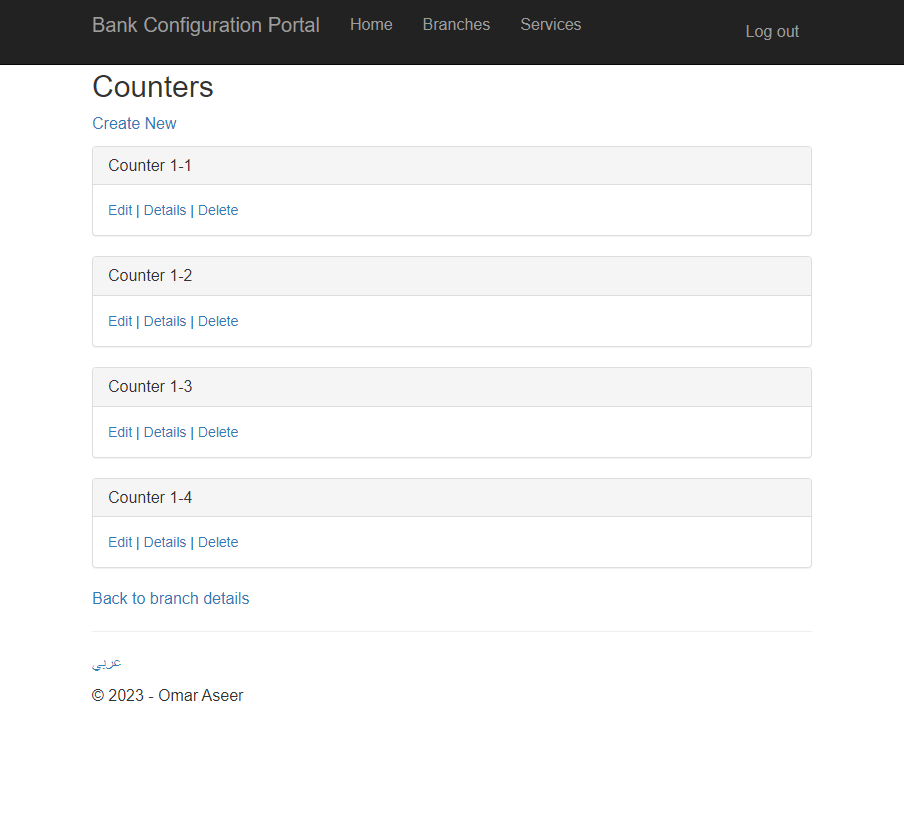


If you want to edit the counters for a specific branch, click the "Details" link for the desired branch, then click "Edit counters".

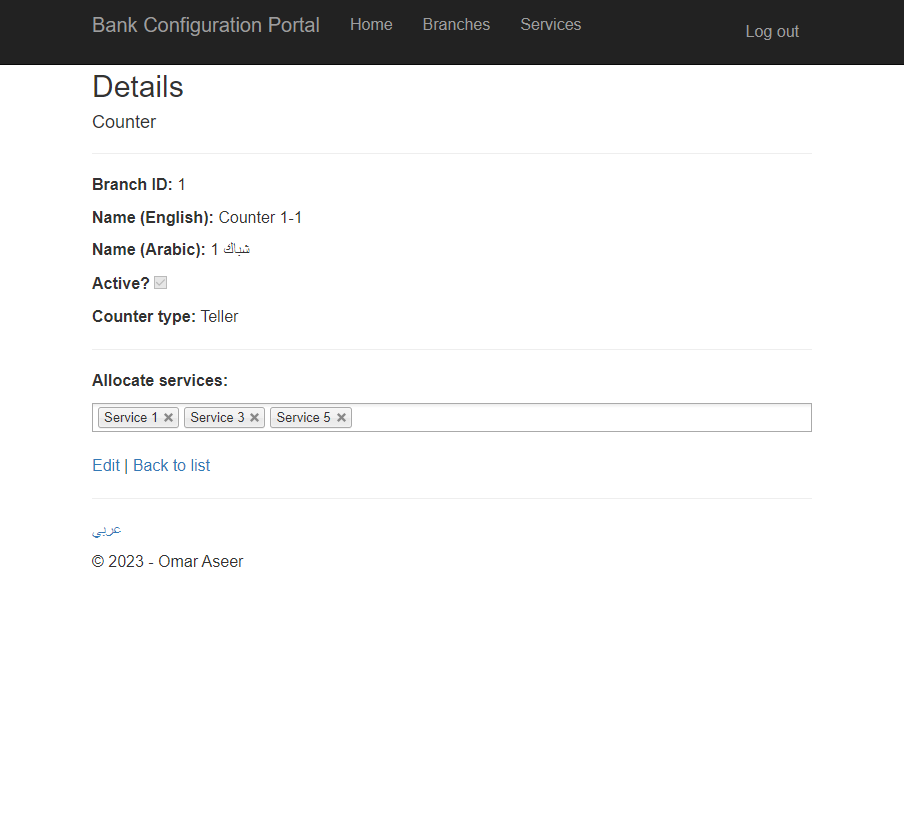


# Counters

Once you’re in the counters page for a specific branch, you can view, edit, and delete existing counters, or add new counters.



If you would like to allocate services for a specific counter, click the "Details" link for the desired counter. Use the drop down to add new services, or click the × symbol to remove services from the counter.

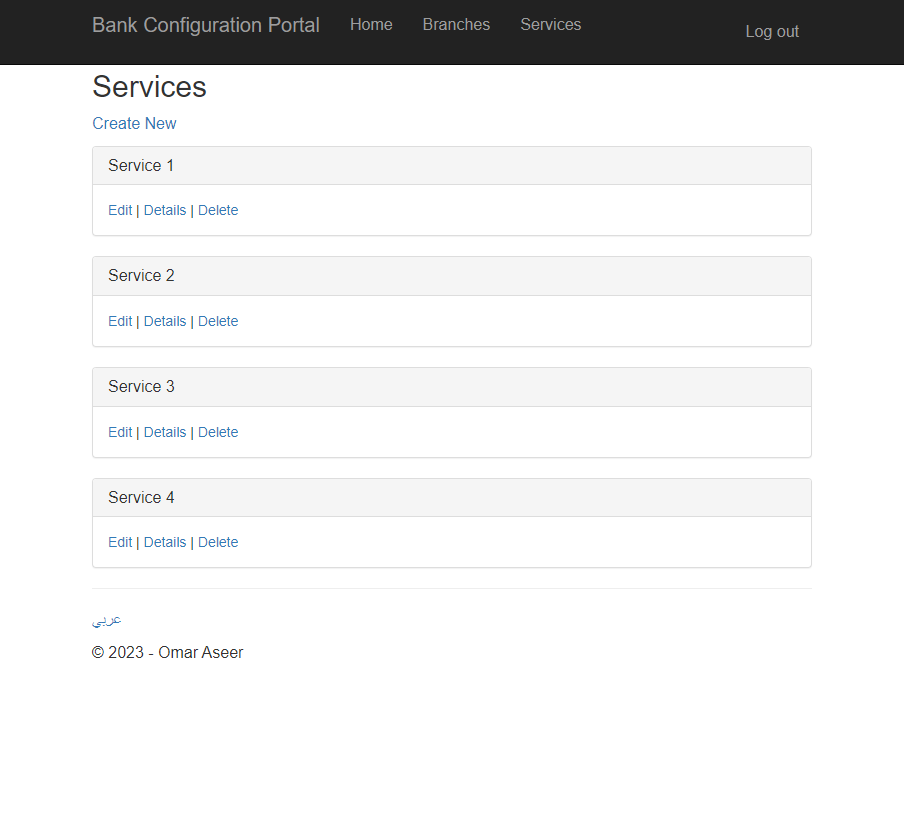


# Services

To view, edit, delete, and add services for your bank, click the link in the navigation bar, or the "Services" button on the home screen.



From the services page, follow the links to add, edit, or delete services.



# Language

You can change the language at any time using the link at the bottom of the page.



