

Infra Course Outline

Customizing Customer Portal



Infra is built using web standard languages, making customizations easy to perform in-house. In this one-day course, technical specialists, system administrators, or officers responsible for customization will learn how to customize the look and arrangement of fields for a Customer Portal implementation.

What You Will Learn

- What the Customer Portal is used for
- How to configure and administer the Customer Portal
- How to modify templates using hidden fields
- How to create additional fields in templates
- How to create multiple custom templates
- Customizing the URL links in the Customer Portal
- Generating drop down lists on portal pages from live data
- How to rebrand the portal for your organization

How You Will Benefit

On completion of this course, students will be able to modify the Customer Portal by creating additional fields, linking live data to drop down lists and changing the appearance of the summary page using HTML and SQL. A full course manual is provided with the course which students can take back to the workplace and use as a future reference source.

Length of Course: 1 day

Maximum Students: 6 Students



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Course Topics

Module 1: Introduction

- Overview
- Customer portal URL
- Customer portal administration
- Default portal option
- Linking customers to the portal
- Linking officers to customers
- Customer portal settings
- Customer portal roles
- Question mapping

Module 2: Template Modification

- Overview
- Using standard custom hidden fields
- Hiding the impact and urgency fields
- Creating additional fields
- Adding a new text box
- Insert call details
- Hardcode the group name
- Hardcode the call type reference
- Hardcode the IPK status

Module 3: Custom Templates

- Custom template names
- Call logging
- Call logging results page
- Call add note
- Calls outstanding
- Customer portal for change
- URL customization

Module 4: Live Data Population

- Overview

Module 5: Customizing Table Data

- Customizing the incident summary page

Module 6: Customer Portal Rebranding

- Style sheet modifications
- Replace header images
- Obtaining hex values for portal color scheme
- Changing style sheet values
- Global link color
- Site tools navigation bar
- Details box
- Repeater tables

Appendix A: Portal Elements

Appendix B: Portal Screens