

INSTALLATION AND DEPLOYMENT GUIDE

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1. Introduction

1.1. Purpose of this Document

- **Technology Familiarization:** It helps team members become familiar with the technologies in use, including their features, capabilities, and how they fit into the organization's workflow.
- **Installation Guidance:** The manual offers step-by-step instructions for installing and configuring these technologies, ensuring that team members can set them up correctly and consistently.
- **Reducing Learning Curve:** By providing clear documentation, the manual minimizes the learning curve associated with new technologies, enabling team members to become productive more quickly.
- **Education and Onboarding:** Guidelines can serve as educational tools for new users. They help users understand how to get started, what features are available, and how to use the product effectively. This can reduce frustration and improve the onboarding process.

1.2 Target Audience: Internal Team

2. Technologies Used

For the frontend development, designing and deployment of both the Landing Page and ABC Project Management platform, the following technologies were used:

1. HTML
2. CSS
3. JavaScript
4. Bootstrap (follow this link to see documentation <https://getbootstrap.com/docs/5.3/getting-started/introduction/>)
5. Git ,GitHub and Github Desktop
6. Visual Studio Code
7. Netlify
8. Caspio
9. Landbot

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To effectively comprehend the content of this document, readers should possess the following prerequisites:

1. **Proficiency in Caspio Platform:** acquire a deep understanding of the Caspio platform, including its features, functionalities, and configuration options. Familiarity with the platform's interface and terminology is essential for comprehending the technical details provided in this document.
2. **Basic Knowledge of HTML, CSS, and Bootstrap:** possess foundational knowledge of HTML, CSS, and Bootstrap framework. Understanding these web technologies will enable readers to grasp the implementation and customization aspects discussed in the document.
3. **Familiarity with Git and Deployment Process with Netlify:** have a working knowledge of Git, a popular version control system, and understand the fundamentals of code repository management, such as committing, branching and merging. Additionally, readers should be acquainted with the deployment process using Netlify, a cloud-based hosting and deployment platform.

By meeting these reader requirements, individuals will be better equipped to comprehend the technical details, follow implementation instructions, and leverage the described processes effectively within the context of the document.

3. Getting started

3.1. Account Registration:

- Visit the Caspio website (<https://www.caspio.com/>).
- Click on the "Get Started for Free" or "Sign Up" button.
- Follow the registration process, which typically includes providing your name, email address, and choosing a password or the account details provided by the ABC.

3.2. Log into Your Caspio Account:

- Once you've created your account, log in with the email and password you provided during the registration process.

3.3. Navigating the Dashboard: Navigating from account to another.

This is the appearance of your account's interface once you've successfully logged in to Caspio.

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As displayed on the screenshot above:

- The product is under development within the **developer account** with the identifier "c3abi8"
- The account "c8fot2" (**free account**) serves as a preliminary and randomly generated user account to get your hands on the Caspio Database application tool before you initiate work on the actual product.

Note: The accounts referenced above are example accounts provided solely for this sample installation and deployment document.

4. Installation and Configuration:

4.1. Front end development and deployment

Files included in the Visual Studio Code:

- Landing Page Folder:

In this principal folder you will have all the HTML files for the Landing page.

- HTML files: book.html, contact.html, contact-action.html, cookies.html, faq.html, get-started.html, index.html, pricing.html, gdpr.html, privacy-policy.html, terms.html.
- Sub-folders:

Inside the principal folder you will have the following folders:

- admin:

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Here you will store the HTML files for the admin page: index.html, log-in.html, manage-users.html, payments.html.

- css:

Here you will store the CSS styles files: adstyle.css, policy.css, portal-style.css, style.css

- portal:

Here you will have all the HTML files of the application: member.html, tasks-assigned.html, book-meeting.html, contact-support.html, log-in.html, manage-members.html, meetings.html, my-meetings.html, my-projects.html, new-meeting.html, new-project.html, new-task.html, overview.html, pay.html, payment-action.html, profile.html, project-details.html, project-evaluation.html, projects-assigned.html, recover-password.html, tasks.html, task-assigned.html, tasks-created.html, upgrade.html.

- img: Here you will store all the images used in both the Landing Page and inside the Platform.

- dk:

In this folder you will have the HTML files for the Danish version of both the Landing Page and the Platform: book.html, contact.html, gdpr.html, cookies.html, contact-action.html, faq.html, get-started.html, index.html, pricing.html, privacy-policy.html, terms.html.

- portal: my-meetings.html, my-projects.html, new-meeting.html, new-project.html, new-task.html, overview.html, pay.html, payment-action.html, profile.html, project-details.html, project-evaluation.html, projects-assigned.html, recover-password.html, task-details.html, tasks.html, task-assigned.html, tasks-created.html, upgrade.html.

4.2. Downloading and installing the software

a. Using Visual Studio Code to create HTML and CSS files

1. Download Visual Studio Code following the instructions here: <https://code.visualstudio.com/download>.
2. Create a folder in your computer and name it as you wish. This will be the principal folder where we are going to store all the files and sub-folders.
3. Create all the folders and files detailed in 4.1.
4. Open the principal folder in Visual Studio Code and start editing your files.

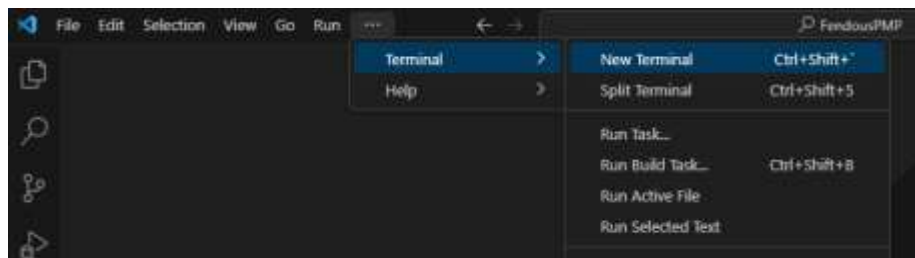
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b. Working with Git, GitHub, Github desktop and Netlify

1. Install Git in your computer following the instructions here: <https://git-scm.com/downloads>.
2. Create an account on [GitHub](#) and follow this [documentation](#) to get started if you never worked with Git and GitHub.
3. Create a repository in your GitHub account and clone it with a local repository which is your Github desktop using visual studio code in your computer where you are going to store the folder you created. You can follow this [documentation](#) to connect your local repository with your remote one.

How to clone the repository?

- Install Git: Before you start, make sure you have Git installed on your computer. If you don't have Git installed, you can download it from the official Git website (<https://git-scm.com/>).
- Open Visual Studio Code: Launch Visual Studio Code on your computer.
- Open the Integrated Terminal: You can open the integrated terminal by clicking on the "Terminal" menu at the top and selecting "New Terminal."
- Navigate to the Desired Directory: In the integrated terminal, navigate to the directory where you want to clone the GitHub repository. You can use the cd command to change the directory. For example:



cd path/to/your/directory

```
cd path/to/your/directory
```

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- Clone the Repository: In the terminal, use the git clone command to clone the GitHub repository. Replace <repository_url> with the URL of the GitHub repository you want to clone. For example:

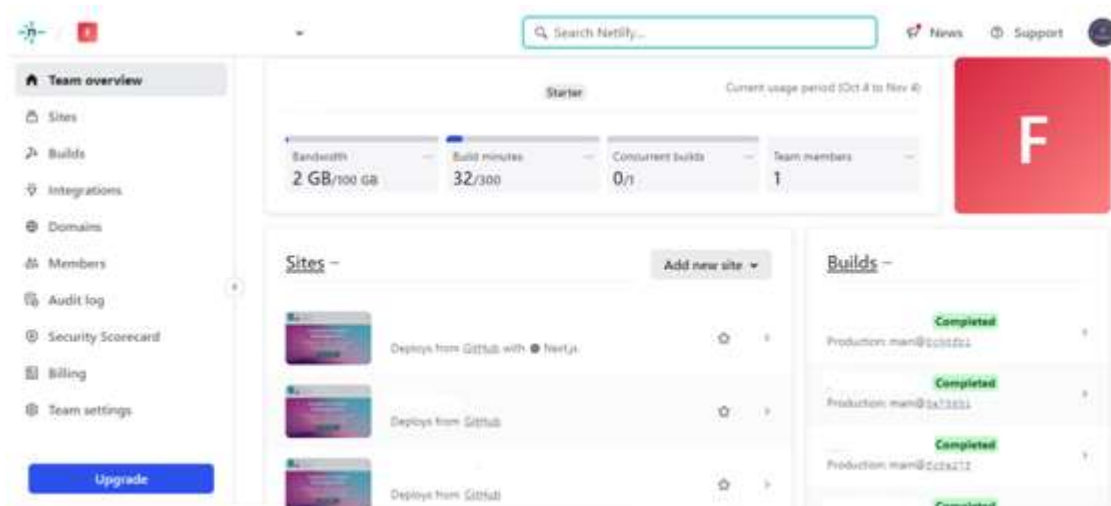
```
git clone <repository_url>
```

For example:

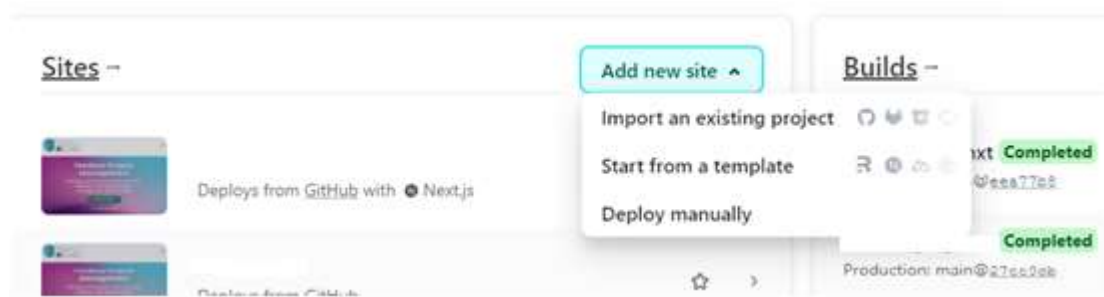
```
git clone https://github.com/yourusername/yourrepository.git
```

You can find the repository URL on the GitHub repository's main page by clicking the "Code" button and copying the URL provided (either HTTPS or SSH).

- Authenticate (if needed): If the repository is private or requires authentication, you may be prompted to enter your GitHub username and password or use an access token.
 - Open the Cloned Repository: After the cloning process is complete, you can open the cloned repository in Visual Studio Code. You can do this by going to "File" > "Open Folder" and selecting the folder where the repository was cloned.
4. Create an account in [Netlify](#). Follow the registration process, which typically includes providing your name, email address, and choosing a password or the account details provided by the ABC.
 5. Create a new project (Add new site) where you are going to deploy the web site.



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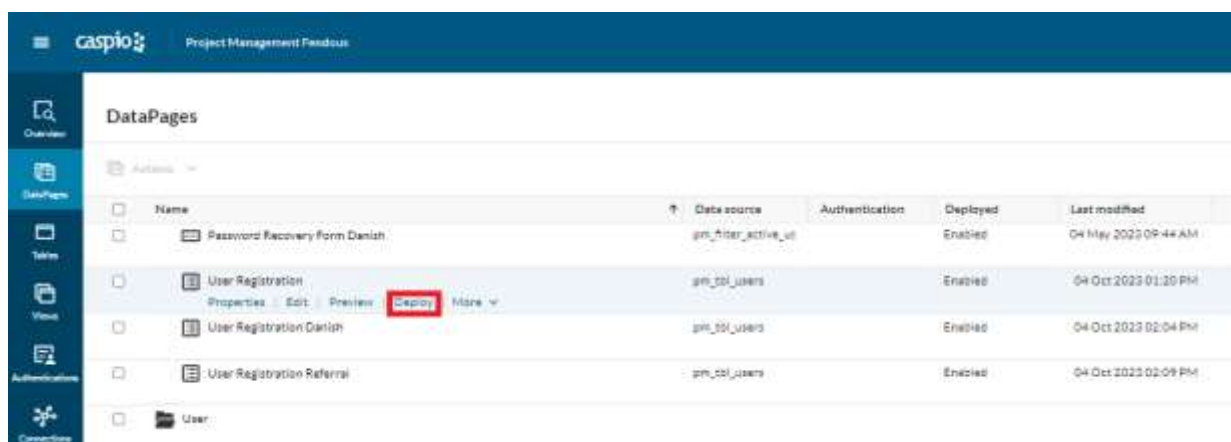
6. Follow this documentation to connect your GitHub repository to your Netlify project. Now, each time you make a change on your GitHub repository, you will see it deployed on your Web Site hosted inside Netlify.

4.3. Deployment Procedure

Here we will show an example of how to deploy a Caspio DataPage into the website. At the end there is a detail with all the DataPages and their corresponding HTML pages.

User Registration DataPage Deployment

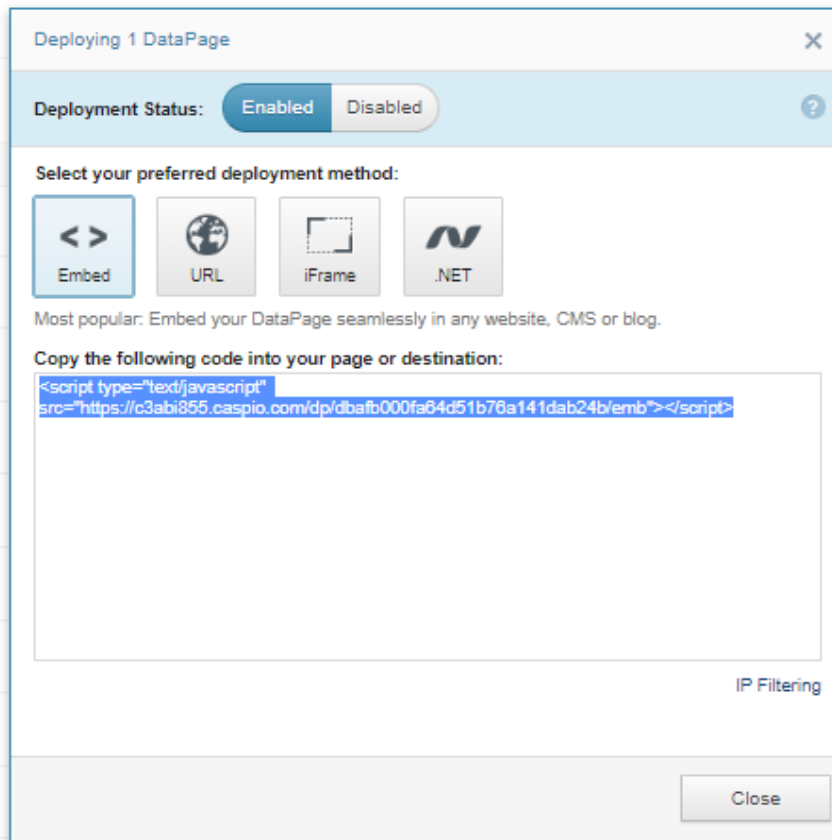
1. Hover your cursor on the **User Registration** DataPage.
2. Click Deploy.



3. Click Enabled on the resulting window to change Deployment Status.
4. Make sure that the deployment method selected is Embed.

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5. Copy the Caspio generated deployed code.



6. Paste the code on the designated HTML file (get-started.html for this DataPage).
7. Save the HTML file.
8. Follow this steps to add, commit and push the changes to your remote repository:
 - Git add.
 - Git commit -m "Here you choose a name for you commit"
 - Git push origin master (use the name of the branch where you are working instead of master if you are working with another branch).

Note: Prior to merging any changes to the master branch, please make certain that code is not pushed directly to it. Instead, all modifications should first be directed to the develop branch and undergo a review process for subsequent merging into the master branch.

9. Refresh the related page on your website and check its functionality.

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5. References

- Caspio - <https://howto.caspio.com/>
- Visual Studio Code - <https://code.visualstudio.com/>
- GitHub - <https://docs.github.com/en>
- Netlify - <https://docs.netlify.com/>
- Bootstrap - <https://getbootstrap.com/docs/5.3/getting-started/introduction/>
- HTML and CSS - <https://www.w3schools.com/html/default.asp> (as an example).
- Landbot – <https://www.landbot.io>