

Administrator, Editor and User Guide

Chalets and Caviar Website Development

<http://alpenluxe3.themeccloud.website/>

OpenClassrooms – Build quick and beautiful websites with WordPress

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1 Introduction

This document provides details on the roles, functionality and their use required to maintain the access and content of the website, “*Chalets and Caviar*”.

1.1 Site Releases

On acceptance by the Project Sponsor and Project Board the DEVELOPMENT (Dev) version of the site and accompanying documentation have met the requirements of the project, the site will be promoted to QA release. As the number of employees who will be using the site is limited, it is suggested that, subject to satisfactory completion of the QA cycle, that the site be promoted directly to production release.

The Project Sponsor and the Project Board will need to determine how long the QA cycle should run and additional administrative tasks required to promote the QA version to Production be performed during this time.

On the final promotion of the site to production, for security reasons, it is recommended that the Agency’s site Administrator delete the developer’s account. This should only be done after final production sign-off has been given.

1.2 Site Roles

There are two roles that are required to administer and maintain the website: Administrator and Editor. While other roles exist, it is recommended that the Administrator and Editor be the only roles used.

1.2.1 Administrator

An *Administrator* has full and complete ownership of a website and all its functionality. This access includes complete authority/access over posts/pages, plugins, users, and configuration. As such this role should be restricted to very few people and used with particular caution.

To minimise the possible risk of site outage as a result of something being accidentally deleted, it is **strongly** recommended that users with this role only use this login to perform access control functions: create, edit, and delete user accounts, password recovery. etc.

For day-to-day content creation and content maintenance it is suggested that an account with Editor role be used.

1.2.2 Editor

An *Editor* can view, edit, publish, and delete ALL posts/pages, manage categories, links and upload files/images.

Note: Editors also have full access to site pages including page deletion. To maintain site content, it is only necessary for Editors to work with **Posts** (property listings) and **Media** (property photos). Working with Posts and Media are covered in detail below.

1.2.3 User

The *User* is the individual who interacts with the completed website. They do **not** require an account to be set up on the website.

A *User* can:

- view existing sales and rental listings (*Properties for Sale, Properties for Rent*)
- register sales and rental listing alerts (*Residential Sales Alert, Residential Rent Alert*)
- raise a rental maintenance request (*Maintenance Request*)
- view details about Chalets and Caviar from (*About Us*) and
- contact Chalets and Caviar (*Contact Us*). **Note**— a user can also contact Chalets and Caviar about a specific listed property from its specific listing page.

1.3 Access Security

It is strongly recommended that company employees who maintain the site change their password on their first login and then subsequently on a frequent basis using “best practices” for password strength and security.

It is also recommended that users each have their own account and passwords are never shared.

Best practices for user account security should be maintained at all times.

1.4 Initial Access

Required accounts have already been created for site QA. These accounts can be used or they can be deleted and new accounts created as required.

1.5 Development and QA Site Details

Dev/QA Site URL: <http://alpenlux3.themeccloud.website/>

Site Hosting Platform (Themeccloud): <https://www.themeccloud.io/>

Site Content Management System (WordPress): <https://wordpress.org/>

Description	Role	Login
Dev/QA Developer login	Administrator	aspen.luxe2
Dev/QA Agency Director	Administrator	admin.alpenlux3
Dev/QA Content Manager1	Editor	editor.alpenlux3
Dev/QA Content Manager2	Editor	editor2.alpenlux3

Dev/QA contact email address: alpen.luxe@gmail.com. This single mailbox receives all client inquiries and requests.

Development/QA user passwords: provided on request

1.5.1 Platform and Site Support

Themeccloud support is provided online via chat from <https://www.themeccloud.io/> by clicking on the “Chat Bubble”.

WordPress support is available by clicking “Support” on <https://WordPress.com/>.

1.6 Production Site Details

The following details will need to be confirmed before site promotion to production.

Production Site URL: **to be confirmed**

Site Hosting Platform (Themeccloud): **to be confirmed**

Site Content Management System (WordPress): **to be confirmed**

Description	Role	Name	Login	Email	Phone
Prod Admin	Administrator	tbc	tbc	tbc	tbc
Prod CM1	Editor	tbc	tbc	tbc	tbc
Prod CM2	Editor	tbc	tbc	tbc	tbc

1.7 Production Site Go-Live

As part of the final release of the production website, free, one-off user training will be provided to all appropriate Chalets and Caviar staff.

2 Site Access and Logins

2.1 Themecloud Login

To access the website, you must:

1. Make sure you have your login details (username and password)
2. Open your web browser and go to: <https://www.themecloud.io/>
3. Click “Login” from the Themecloud menu

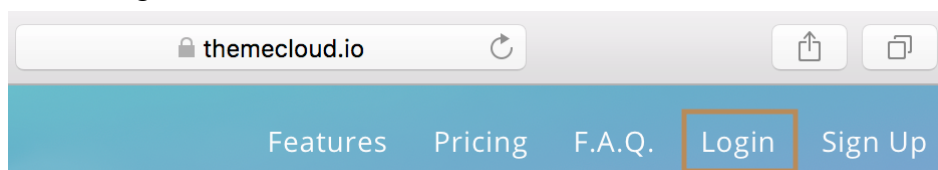


Figure 1 - Themecloud Login (1)

4. Enter your assigned login details in the Welcome to Themecloud dialog. For added security do NOT check “Remember me”. This is particularly important if you are using a public or shared workstation.

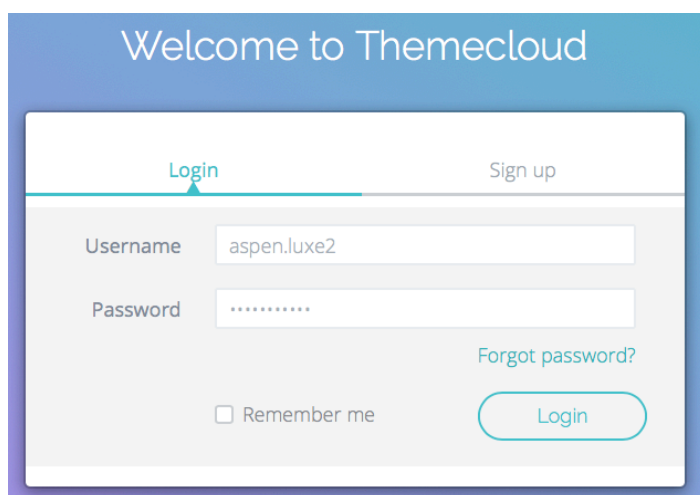


Figure 2 - Themecloud Login (2)

5. Click the “Login” button.

2.2 Accessing the WordPress Dashboard

1. On the My Websites page, click the “Go to my website” button for website alpenluxe3. (You should only have one website listed.)

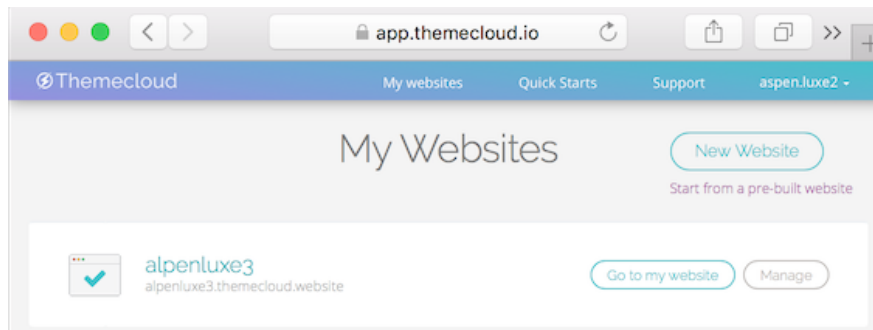


Figure 3 - My Websites

2. A new browser tab will be opened and the site dashboard displayed. If you do not see the site dashboard, click “*Chalets and Caviar*” and select “*Dashboard*”.

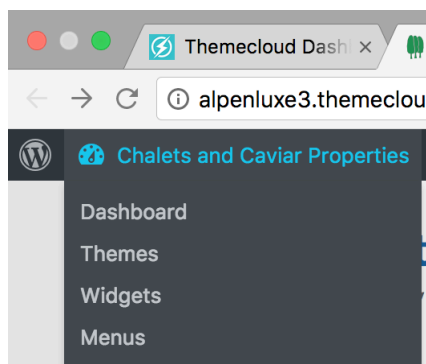


Figure 4 - Accessing the Site Dashboard

3. You can now do the work you need to do!

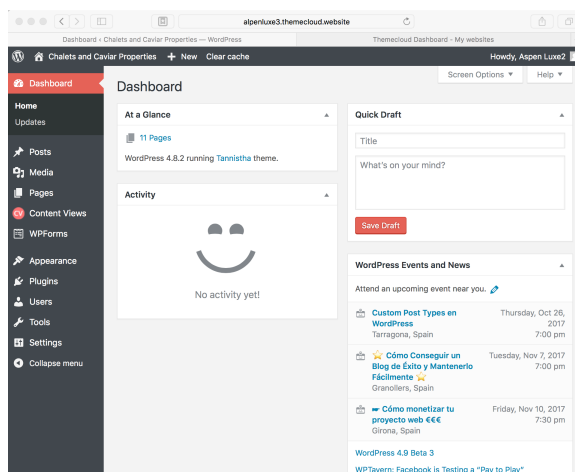


Figure 5 - Site Dashboard

3 The Site Dashboard

3.1.1 Who Can Work with Posts?

This function can be performed by both **Editors** and **Administrators**.

3.1.2 Introduction

All property listings are controlled using Posts entries. This includes: properties for sale, properties for rent, and sold properties.

You create, modify and delete property listing entries using the Dashboard's "Posts" > "All Posts" menu item.

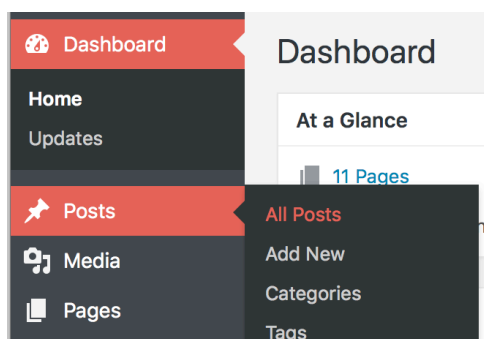


Figure 6 - Accessing All the Property Listings

Two default templates have been created to simplify the task of property listings maintenance. They are:

1. **Rental Posts Template:** all new rental listings should be created using this template.
2. **Sales Posts Template:** all new sales listings should be created using this template.
3. **Sold Posts:** there is no separate template for sold properties. You only need to update an existing "Sales Listing" post to "move" it from "for sale" to "sold". Details on how this should be done are included below.

3.1.3 Creating a Property Listing

From the Dashboard select Posts and then click All Posts. Point your mouse over template name you want to copy and click “Clone”.

Clone appropriate template.

1. If the new property to be listed is a rental listing, clone the Rental Posts Template.
2. If the new property to be listed is a sales listing, clone the Sales Posts Template.

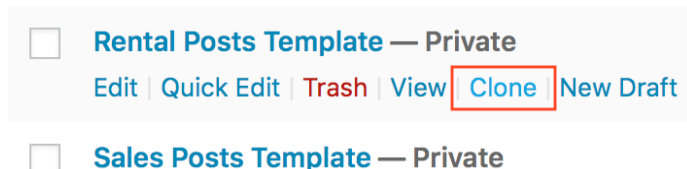


Figure 7 - Copy the Rental Posts Template to create an new rental listing

3. To create the new listing details, continue to Section 3.1.4 – Edit an Existing Listing.

3.1.4 Edit an Existing Listing

From the Dashboard select Posts and then click All Posts. Point your mouse over the listing you want to edit and then click “Edit”.

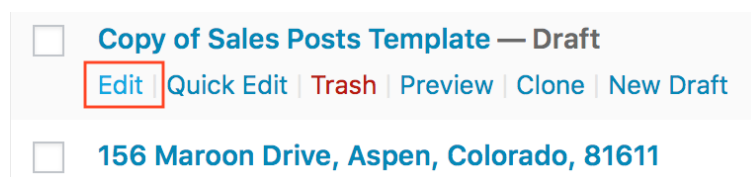


Figure 8 - Edit an existing property listing

Use this option to finish creating a new listing cloned from one of the templates or to update the details of an existing listing.

3.1.4.1 Cloned Template Updates

Change “Copy of Sales (or Rental) Posts Template” to the new listing’s address.

Enter (or update) the required information in the listing. For a new listing, all areas that need to be updated are indicated by <<...>>. The following is a summary of the information that should be entered for these areas.

Note! Make sure that any updates you make are done from the “Visual” tab. **Do not** make edits from the “Text” tab unless you have a good understanding of HTML and webpages.

field	Rental Listing	Sales Listing
<<date>>	listing date	listing date
<<type>>	“For Rent”	“For Sale”
<<price>>	p.c.m. per calendar month	<<indicative>> if sale by auction a guide price should be indicated.
<<area>>	property area in square feet	
<<beds>>	number of bedrooms	
<<bathrooms>>	number of complete bathrooms	
Description	Enter the property description in this section. Include all information deemed relevant for the property being advertised. Do not remove the headings “Description”. This is a “non-dynamic” part of the listing template.	
Property Gallery	<p>Photos of the property will need to be added to the listing.</p> <p>Delete <<insert photo gallery here>> and place the cursor at the beginning of the row blank row. (Do not delete the section heading, “Property Gallery”.</p> <p>Make sure that you have access to all the necessary photos either they have previous been added to the site via the “Media” options, or you have them available externally.</p> <p>Click “Add Media” then select “Create Gallery”.</p> <p>If the photos have previously been uploaded as site “Media”, select the photos from the “Media Library” tab. If the photos have not previously been uploaded, select the “Upload Files” tab. When you have selected all the desired photos, click the “Create a new gallery” button to save the photos to the listing.</p> <p>Under “Gallery Settings”, change the “Link To” drop-down from “Attachment Page” to “Media File”.</p> <p>If there are less than 20 images to be included in the gallery, it is suggested that the number of “Columns” should remain “3”. If there are more than 20 images to be included in the gallery, it is suggested that the number of “Columns” should be change to “4”.</p> <p>Do not select “Random Order” and leave “Size” as “Thumbnail”.</p>	

3.1.4.2 Property Category

Make sure that you uncheck the template's default category, "Uncategorized", and check one or more of the correct categories, "Rent Listing", "Sales Listing", "Auction" or "Sold". This should be done on the Posts edit page.

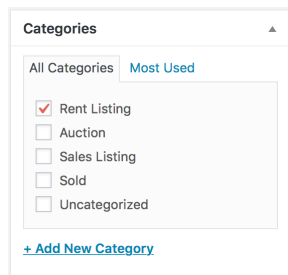


Figure 9 - Listings Categories

3.1.4.3 Featured Image

While not mandatory, as well as the updates above it is strongly recommended a "Featured Image" be selected from the photos of the property as a lead-in image. This should be done from the Posts edit page.

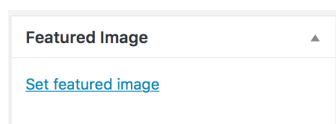


Figure 10 - Select Featured Image for Post

3.1.5 Delete an Existing Listing



Figure 11 - Select "Trash" to delete a property listing

3.1.6 Recover an Accidentally Delete Listing

If you accidentally delete a listing, you can recover it by selecting "Trash" from "All Posts", hover over the entry and select "Restore" to recover the listing.

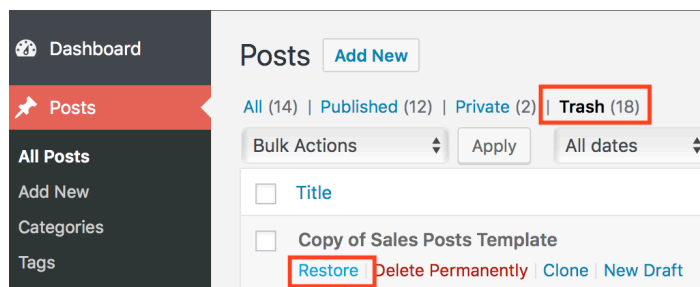


Figure 12 - Recover an Accidentally Deleted Listing

3.2 Media

3.2.1 Who Can Work with Media?

This function can be performed by both **Editors** and **Administrators**.

3.2.2 Introduction

Media can be added separately or as part of listings creation. This section explains how to work directly with media without creating a listing.

From the site Dashboard select:

- Media > Library (to access all existing photos loaded to the site)
- Media > Add New (to add new photos to the site)

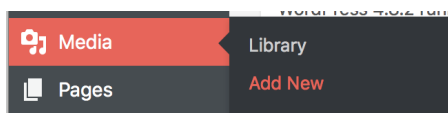


Figure 13 - Media Maintenance Menu

3.2.3 Media Library

From the “Library” option, photos already uploaded can be viewed, their details edited, or they can be permanently deleted.

You can also verify if or to which property the image has been attached.

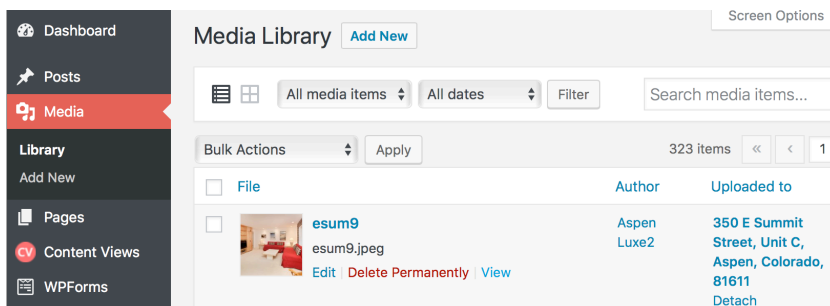


Figure 14 - Media Library

3.2.4 Add New media

Uploading new photos of properties from this page is quite straight-forward. You can either:

1. browse to the files to be added using a separate file browser/file finder window and then “drag-and-drop” the files on the gray area indicated
2. click the “Select Files” button and a file browser/finder window will be displayed that you can use to select and upload the desired files.

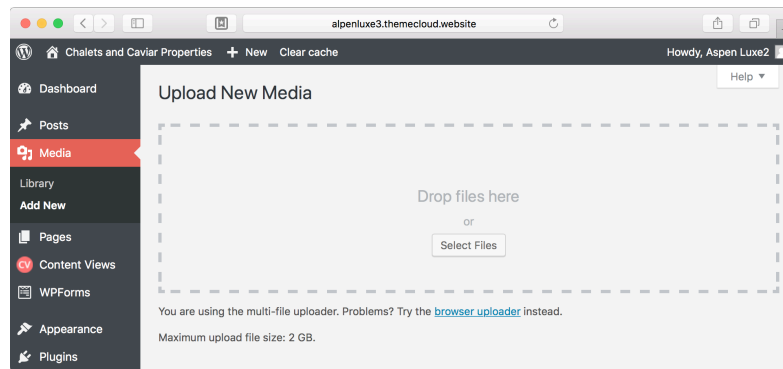


Figure 15 - Upload New Media page

3.3 Site Roles

3.3.1 Who Can Work with Site Roles?

This function can **ONLY** be performed by **Administrators**.

3.3.2 Introduction

User maintenance is performed from the site Dashboard. Select:

- Users > All Users (to view, modify or delete existing users)
- Users > Add New (to add a new user)
- Users > Your Profile (to view/update your account).

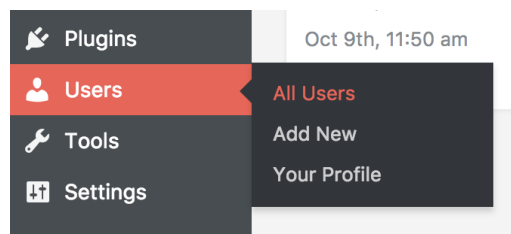


Figure 16 - User Maintenance Menus

3.3.3 Add New User

From the site Dashboard select Users, then Add New—enter all necessary details then click [Add New User] button.

3.3.4 Modify Existing User

From the site Dashboard select Users, then All Users. Hover the mouse pointer over username and click “Edit”. Enter the user updates and then click the [Update User] button.

3.3.5 Delete Existing User

From the site Dashboard select Users, then All Users. Hover the mouse pointer over username and click “Delete” then click [Confirm Deletion] button.