**Client: Lansdowne Children’s Centre**

**Project: LCC Portal Website**

**Date: January 8, 2021**

**Colour Codes:**

Light Green - #259f42

Dark Green - #00703c

Yellow - #fec43d

Text Grey - #282829

**For Reference:**

Although some things may have been adjusted in these new designs, this project is largely a facelift of the existing Lansdowne Portal. As such, it may be very helpful to refer to this portal. Included below are ways for you to access the Front End user screen, and the CMS where Lansdowne manages the portal.

**Front End Login** - <http://www.lansdownecentre.ca/login.php>

User: [brian@tdgmarketing.com](mailto:brian@tdgmarketing.com)

Password: 22bobcat

**CMS Login** - <http://www.lansdownecentre.ca/admin-cp/login.php>

User: management

Password: lansdowne01

(In the menu on the left side there is a section for managing the Staff Portal and the Board Portal)

**Portal Overview**

This portal is broken into two separate parts: Staff and Board.

The intention is that the administrator, through use of the CMS, will add the accounts that they wish to grant access to, and at this time will choose which section(s) they wish to grant the account access to. You can see the way this is set up by logging into the current LCC CMS and clicking the ‘Manage Account’ from the list on the left.

When users sign in one of two outcomes can occur:

1. The user will be taken to view the section that they have been granted access to (either Staff or Portal)
2. If the user has been granted access to view both Staff and Board portals, they will be asked to select which portal they wish to view.

It is important that the portals be separate from each other, so that only those with proper permissions may view the other portal. This means there must be no way for someone with only Staff permission to view the Board portal without having been granted access by the administrator through use of the ‘Manage Account’ section of the CMS.

Many features of both portals are similar between the two, but content will be different as the administrator will be uploading content specifically based on which group is the intended reader.

It should be clearly labelled on the CMS which section is which to avoid any possible confusion during the process of creating posts.

**Key Changes to New Portal Designs**

Although not much about the way the current portal is structured will be changing, the key changes to note have mostly been made on mobile. Some pages will be displaying differently than they were before. The most notable page for this is the ‘Respite Calendar’ page, which will restructure itself on mobile devices to be more user-friendly.

Front End

**Staff Portal: Overview**

The Staff Portal is to be used by staff members of Lansdowne Children’s Centre. When the staff member logs into the Staff Portal, they will land on a screen that loads the default Staff landing page (New This Month). On the left side of the screen, they will see a list of other page views that they can access. This list includes:

* New This Month – this will be used as an “update” section for items that do not necessarily belong in the other categories
* Respite Calendar – this is a simple calendar that allows the user to see an overview of the upcoming (or past) events. By default, the current month will always load on page load.
* Contacts – This is a simple text page that the user can use to find contact information for other Lansdowne institutional members.
* Policies/Procedures – This is a simple page that displays entries that contain links to resources pertaining to policies and procedures that are relevant to Lansdowne staff members.
* Available Contracts – This is a simple content page that displays existing contracts.
* Education/Resources – This is a list of entries in which the user can browse through to find links to resources about specific topics.

As mentioned, this is largely just a re-skin of the existing website. It is strongly suggested to review the current portal. You can gain access to this by following the link in the ‘For Reference’ section at the top of this document. Comparing the existing site to the new design is a recommended strategy while developing this portal.

**Board Portal: Overview**

The Board Portal is to be used by members of the Lansdowne Children’s Centre Board to access information about past meetings, upcoming meetings, bylaws and procedures, and to submit specific forms. When the board member logs into the Board Portal, they will land on a screen that loads the default Board landing page (Board Information). On the left side of the screen, they will see a list of other page views that they can access. This list includes:

* Board Information – this will be used similar to the ‘New This Month’ section of the Staff Portal as a section for items that don’t necessarily belong in the other categories
* Meeting Minutes – This is a section that will host a series of entries allowing users to view and download meeting minutes documents from past meetings.
* Meeting Packages – This is a section in which the user will be able to view upcoming meetings for important dates and resource links that will be helpful for preparing for the meeting.
* Forms – This section allows the user to view and complete various forms that the Lansdowne administration team will collect.
* Bylaws/Procedures – This page allows the user to view and download resources pertaining to specific bylaws and procedures relevant to the Lansdowne board.
* News – This page contains a simple Facebook feed from Lansdowne’s public page.

Much of the functionality of this section is similar to the Staff Portal. Below you will find how each section will function within the CMS.

**Staff and Board Portal Content**

Lansdowne has been keeping their portals up to date, so in this sense we are free to migrate all existing information from the current portal into the new portals. Please use the content, links and files currently located on the portals on their live site.

For convenience, the portal access information has been repeated below:

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User: [brian@tdgmarketing.com](mailto:brian@tdgmarketing.com)

Password: 22bobcat

**CMS Login** - <http://www.lansdownecentre.ca/admin-cp/login.php>

User: management

Password: lansdowne01

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CMS

**Access: Managing Accounts**

Through use of a ‘Manage Accounts’ option in the CMS, the administrator will be able to view, edit, delete and add accounts. When the administrator clicks into the ‘Manage Accounts’ section, they will be viewing a full list of active accounts. This list should automatically display by First Name and then by Last Name.

In the top portion above the list, the administrator should be able to sort the list by Staff or Board, or enter a search term to filter by relevant text.

As the list of accounts will be growing, a search function should also be incorporated so that the administrator can type in a word that appears within the desired result and have a list of matches appear below.

**Access: Creating Accounts**

If the administrator clicks on the ‘Add New User’ option within the ‘Manage Accounts’ section of the CMS, the administrator will be asked to enter the following:

First Name

Last Name

Job Position/Title

Account Email (Username)

Account Password

Access Type: Checkboxes for Staff and Board

If only Staff is checked off, the user may only access the Staff Portal. If only Board is checked, the user may only access the Board Portal. If both options are checked, the user may freely flip between the Staff Portal and the Board Portal.

**Access: Editing Existing Accounts**

When the administrator chooses to edit an existing account, all the same details that were entered when the account was edited will be displayed and can be changed.

When the administrator has edited the account to their liking, they will click a ‘Confirm Changes’ option, and the account information will update immediately. A message stating “The account has been successfully updated” should display at the top of the page. If the admin wishes to cancel the changes, they can click a ‘Cancel’ button to keep the account the same as it was before and navigate back to the account entries list.

**Common Content Pages**

You may notice that the design file does not include a page design for every page of the portal. This is because the design and relationship to the CMS is common between a number of pages. These pages are the simple entry-based pages that you can see on the live portal, as well as the design PDF page for ‘Policies/Procedures’.

These pages contain a list of entries created by the Lansdowne admin that contain a title, content area, and a list of links/resource documents at the bottom of each entry.

The full list of pages that use this template are:

On the Staff side:

* New This Month
* Policies/Procedures
* Available Contracts
* Education/Resources

On the Board side:

* Board Information
* Meeting Minutes
* Meeting Packages
* Bylaws/Procedures

Pages that do **not** follow this template are:

On the Staff side:

* Respite Calendar
* Contacts

On the Board side:

* Forms
* News

**Entry Display Limit Per Page**

Although not shown within the design documents, the ‘Forms’ page as well as pages using the aforementioned Common Content Template will show a number of results in the bottom right corner of the page. When the number of entries exceeds 10, the page will display arrows that allow the user to navigate to the next 10 entries.

This functionality will work exactly as it does on the current portal. This can be referenced on the Education/Resources page of the Staff Portal.