

User Management

Spyglass Website Training Manual

If this manual is printed, you can find the links to these pages on the Admin Help page on the website.

Notes:

- User accounts were transferred from Joomla, the username, contact information, and passwords are the same as Joomla.
- Usernames cannot be edited once a user is created. If someone needs a new username (ex. name change), you will need to delete the user account and recreate the user account.
- All the rest of the user fields can be edited by residents or admins.
- Admins cannot see passwords.

Add a User

1. Go to: Users/Add New - <https://spyglasscondos.com/wp-admin/user-new.php>
2. Username: The Spyglass format is first initial + last name (ex. scarr). The capitalization combination doesn't matter.
3. Email address: used for login and to receive website emails
4. First name: displayed in directory, who lives there map, and emails
5. Last name: displayed in directory, who lives there map, and emails
6. Website: leave field blank
7. Password: Enter a unique password or use a generated password.
8. Sent user notification: skip this, and send the user's login to them via email. This email function tends to go to spam/junk folders, so it's better to email login credentials.
9. User Role: select appropriate role. If the user is a board and admin, select both boxes.
 - a. Resident: view resident portal, submit repair requests
 - b. Board: view resident and board portals, submit and view all repair requests, add calendar events
 - c. Administrator: all resident and board views, plus create resident users, add people to resident directory, add to Who Lives There map, upload documents, and create surveys.

WordPress dashboard header: Spyglass Condos, 8 notifications, 0 comments, + New, Notes, Events, Forms.

Add New User

Create a brand new user and add them to this site.

Username (Required)

Email (Required)

First Name

Last Name

Website

Password

Strong

Send User Notification Send The New User An Email About Their Account.

User Roles

- Administrator
- Author
- Board
- Contributor
- Customer
- Editor
- Residents

Left sidebar menu: Dashboard, AyeCode, Posts, Events, Draw Attention, Media, Forms, Pages, Comments, Help Desk, Residents Directory, FooGallery, WooCommerce, Products, GeoDirectory, Analytics, Marketing, Elementor, Templates, Appearance, Plugins (7), **Users** (All Users, Add New, Profile).

This is an example of a resident user account

Manage Existing Users

1. Go to: Users - <https://spyglasscondos.com/wp-admin/users.php>
 - a. Edit a user: click the name to edit an existing user
 - b. Delete a user: hover over the name and click Delete
 - c. Change a role: click on the name of the user and then edit the role checkboxes.

The screenshot displays the WordPress 'Users' management interface. The top navigation bar shows the site name 'Spyglass Condos' and the user 'Howdy, Resident Spyglass'. The main content area is titled 'Users' and includes a search bar and a table of users. The table has columns for Username, Name, Email, Roles, Posts, and GD Listings. The 'Board' user is highlighted in blue. The sidebar on the left contains various navigation options, and the top right corner has 'Screen Options' and 'Help' buttons.

| <input type="checkbox"/> | Username | Name | Email | Roles | Posts | GD Listings |
|--------------------------|------------------------------|-----------------------|--|----------------------|-------|---|
| <input type="checkbox"/> | AWadwha | Anish Wadwha | anishw@gmail.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BBunting | Becky Bunting | bbunting@mykandi.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BButterfield | Brian Butterfield | brianbutterfield@yahoo.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BDryfhout | Bill Dryfhout | bdryfhout@juno.com | Board | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BFischer | Brian Fischer | Brianf@fisherprinting.net | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BHufford | Brian & Julie Hufford | Brianchufford@gmail.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BHyde | Bill Hyde | bill.hyde@outlook.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BKreiter | Betty Kreiter | mekwek4@gmail.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | BNLau | Bill & Norine Lau | Ndlau@walcpa.com | Residents | 0 | Residents Directory (1) |
| <input type="checkbox"/> | Board | — | holmesg+testchange2@courtladconsulting.com | Administrator, Board | 0 | Residents Directory (1) |