[Administrator Help (WIP)]

How to manage content access on content type Outing

By default, anonymous (unregistered) users are not allowed to see Outing content. If you want to allow anonymous users to see and apply for Outing you will need to go to that Outing. Then, click on tab Grant and check an option -> View for anonymous user.

Then, click on the button Save grants. After the saving process is finished flush the cache of the site by hovering a WCA icon on the Top black admin menu, choosing Flush all caches menu item link.

Edited Outing will now be available for Anonymous to read and sign up.

How to change WCA acknowledgment buttons

On the black top Administration menu hover on Content management -> Content types -> Outing -> Manage fields and click on Event acknowledgment.

/admin/content/types/event-purchase/fields/field_conditions

You will get an edit field page where you can change default values for this field e.g. code, help text etc.

Under Outing settings you can click a plus icon for default value and you will see the active HTML code for that field. Change or update the code and click on a button Save field settings. That will change the field code for newly created Outings.

You can also change the code per Outing simply by editing Event acknowledgment field in that Outing.

For both options, you will need Administrator permissions for your account.

Forum - Adding New Forum - Things to Remember

When you create a new forum you MUST set the Access Controls sections.

a) if you do not give View privileges to WCA Master Admin you will not be able to edit the forum. This is what happened here, only anonymous user was set to view.
As it is stated in the Permission information section:

- User need the administer forums permission AND View to be able to administer forums (and change access!).

b) IMPORTANT you need to set permission for view, post, edit and delete as it is set for Members General Forum http://www.wildernesscanoe.ca/admin/content/forum/edit/forum/167 (if you are adding to Members Forums)

- View must be ticked on for ALL,
- Post for ALL except anonymous
- Edit and Delete as in the General forum, only WCA admins

c) Similarly, if you are adding new forum to Board container, copy permissions from one of the existing Board forums.

How to Add a New Website Page

- go to **Manage content -> Add Page**
- fill in the data - title, menu title,
- in Parent item chose under which menu you want page to appear
- add content to the Body
- Save and wait for confirmation message

How to Add a Trip

- go to **Trips-> Submit a Trip**
- Note: Members can also submit a trip, but it will be Unpublished after their submission. Unpublished trips will have "UNPUBLISHED" watermark for easy status identification.
- WCA Admin will be notified about new submission via e-mail. Only admin can publish a trip (see "How to Approve User Posts" below for instructions)

How to Approve User Posts (Trips/Bulletins)

- go to **Postings Approval -> Approve User Posts**
- select the Content Type (Trip or Bulletin Board) and press Filter button
- click on the title of the trip and the trip details page will open
- click on the Approval tab
- see "Change Content Approval State" radio button to "done"
- pres Submit button and weight for confirmation. View tab will be shown without UNPUBLISHED watermark
- check if the Trip is shown in the list.
- If you want signup e-mail notification mails for an event to go to the trip organizer instead of the WCA admin, you should set the organizer e-mail address in the Signups tab->Settings->Send signups to

Note: Unpublished trips will have "UNPUBLISHED" watermark for easy disting

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How to change notification e-mail for new/updated trips

- Go to trip Management - Trip Update mail notificaton

How to turn off ALL Outings notifications

- As superadmin go to Messaging & Notification->Notification Settings->Events
- Check off all boxes
- Save the change and wait for confirmation

How to change admin e-mail address that will receive admin notifications

- *when **new account** is created* - in Site configuration ->Actions->Configure ("Send e-mail when account is created") *(only superadmin can do this)*
- when **new trip/bulletin** is posted - in Site configuration ->Actions->Configure ("Send e-mail to admin approval") *(only superadmin can do this)*

- when **user sign up for a trip** - in the trip itself - Signups tab->Settings->Send signups to.

IMPORTANT: If you want notification on user signups for a event to go to the trip organizer, instead of the WCA admin, when approval is done, you should set the organizer e-mail address in the Signups tab->Settings->Send signups to.

How to See Registered Users

- go to **Manage Users-> Manage/Add Users**
- click on role radio button and select Member in the drop down below
- click on Filter button
- list of users will appear

How to Change Order Status To Completed for Cheque Payments
(or How to Activate New Members)

Note: (This is NOT required for credit card payments!) When user register using the "Create new account link" on the home page and selects "cheque" as a membership payment method, user will not have active Member status and access to all sections of the site. To change his/here status you have to update Order to "completed" when the cheque/money order is received. The system will then assign a Member role to this user. To chnage the order status to completed:

- go to **Store Management ->Manage Orders**
- go to view orders
- at the bottom of the page change Status form "Pending" to "Completed"
- press Update and wait for confirmation
- the system will assign the Member role to this user. You can check this in Manage Usere->Manage Users in the Roles column. In case of any issues with this process you can manually assign user a Member Role. See the section below for instructions on how to do that

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How To Assign a Role to a User

- go to **Manage Users->Manage Users**
- find the user you want to edit
- in the row with the user id you want to "edit", click on edit in Operations column
- user account information page will open
- in the Roles: section select the role(s) you want to assign to this user
- press Save button at the bottom and you will be redirected back to the list of users
- the roles should shoe in the Roles column

Alternative way: select the user by checking the box in front of the user name and in the "Update options" drop-down list select the role in the "Add a Role" section, then click on Update. You would use this option if you want to update multiple users at the same time.

IMPORTANT:

- ALL active Members you should have **Registered User** and **Member** role assign (first will let then log in to the site, second will allow rhem access to the pages restricted to members)
- For **Outings Committee** members add Outings Committee role to the two
- For **Membership Secretary**, **Content Editor** or **Master Administrator** you would add appropriate role
- "administrator" role SHOULD NOT BE ASSIGN TO ANYONE but the "admin" user!!!

How To Edit User Data

- go to **Manage Users->Manage Users**
- find the user you want to edit
- in the row with the user id you want to "edit", click on edit in Operations column
- user account information page will open
- choose the section you want to edit - Account, General Information or Optional Information
- make the changes you want
- press Save (Note: you have to save each section individually, otherwise your changes will not be saved)
- wait for the message "The changes have been saved" (or to be redirected to the list of users page).

How to Block A User

- go to **Manage Users->Manage Users**
- a list of user will be displayed find the one you want to change
- select the user by checking the box in front of the user name
- in the "Update option" drop-down list select the "Block Selected Users" and then click on Update.
- wait for page to reload
- "The update has been performed" message should appear at the top of the page
- Status of the user should show as "blocked"

Note: To activate blocked user, you would follow the steps listed above and select "Unblock the Selected Users"

How to Add New User/Member

- New members should be encouraged to create their accounts using "***Create new account***" link on the home page
- In case you want to add a member manually you can go to **User Management -> Add User**
- enter user data
- in "Roles" section, for ALL active Members you should check **Registered User** and **Member** boxes
    - For **Outings Committee** members select extra Outings Comm box

- For Membership, Content Editor or Master Administrator you would assign appropriate role
- "administrator" role SHOULD NOT BE ASSIGN TO ANYONE but the "admin" user!!!

Note: Website back-end engine has the mechanism to assign and revoke the Member Role which is linked to the payment of Membership Fee or Renewal of Membership Fee. "Role expiry date" parameter is used for that purpose. See "How to Manually Change Membership Expiry Date" section for more info in cases when you need to over

IMPORTANT TO UNDERSTAND:

- When the new user is created via "Create new account" link on the home page, he will be added as Registered User.
- **To gain access to member restricted data user must have Member role, as well**
- Only after payment is made via credit credit, the system will automatically add Member role to the user profile.
- If payment is made and cheque/money order is selected, you will have to manually finish the transaction by changing the order status to completed, once you receive the payment. (See instruction above on how to do that). The system will after that assign the Member role to that user.
- You can manually override user assigned role, when needed (see "How to Assign a Role to a User")

How to Change Membership Expiry Date

- go to **Manage Users->Membership Expiry**
- a list of users with "Member" status/role will be shown
- click on Edit in Operations column for the user you want to change
- User account information will show (On this page you can edit detail member information.)
- click on the "Ubercart roles" section at the bottom of the page to expand it
- change the Expiration Date by adding or removing days/weeks/months/years
- click on Save and wait for confirmation message at the top of the reloaded Users page
- check if the new date is reflected

How to Revoke a Member Role From a Member

- Go to **Manage Users -> Manage/Add Users** page
- Find user you want to change and click on the box in front of her user name. The box will be marked as selected.
- Then go to the top of the page. From the **Actions options** dropdown select the option below **Remove Role for Selected Members** named Member.
- Click on **Apply action** button and wait for confirmation.
- If everything is done properly her Member role will be gone and only Registered User role will remain

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How to Export User Data (PENDING)

- right click on **Manage Users -> Export Users** and select "**Save Link As**"
- A pop up "Save As" window will open
- Select "Save in" folder where you want to save the file
- in the file name specify yourname**.csv** or yourname**.xls**
- For "**Save as type**" select "All files"
- Click Save and the file will be saved

How to Change Rotating Banner Images

- Use cPanel File manager
- upload the new images to the folder **themes/zen/img/banners**
- system will automatically use the added images in the rotation
- delete old images
- Note: ensure that the image size is 1024x277px
- Both logo and bottom margin must be in part of that image. (check existing images for clear reference)

How to change Mail Notification Message for soon to expire Membership

- The e-mail body is in the php file -> modules/ubercart/uc_roles/uc_roles.module

- When (how many days before) the message is sent is controlled in: Store Administration ->Configuration -> Product Settings. On the page find **Role Assignment** (only superadmin can do it)

Change to the message displayed on screen is also set on this page

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Where are production files?

- Production files are in the **public_html/ WCA** folder**.**
- Staging files are in the public_html/DRUPAL-WCA-STAGE/
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Where to Set/Change the Expiry Period Notification

For Expiry Period go to ***Store Administration -> Configuration -> Product Settings***
On that overview page, search for ***Role Assignment*** - it will be in the Product Feature section.
It is best to use Firefox browser for superadmin in general & to expand Role Assigment settings.

Note: Alternative way to access it is ***Store Administration -> Configuration -> Product Settings -> Edit -> Product Features.***