USER REGISTRATION & MANAGEMENT IN THE BDRS

Introduction

Users are required to self register with each instance of the Biological Data Recording System (BDRS)

Notes
Future versions may support

- Individual or group pre-registration processes
- Require password reset on first use
- Restful URLs containing all necessary portal ID/name/resolution detail

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TIP

Accessing the appropriate site:

When a potential user is sent a link to a specific BDRS instance it needs to include the portal ID otherwise they will open the default BDRS instance on that portal.
Examples:
GER Southern Highlands http://bdrs-uat.ala.org.au/bdrs-core/portal/10/home.htm
Wolli Creek Preservation Society http://bdrs-uat.ala.org.au/bdrs-core/portal/3/home.htm

If uncertain as the portal ID select the Site Help menu item.

PART 1: USER SELF REGISTRATION WITH A SPECIFIC BDRS INSTANCE

Self Registration

Instructions:

1. Open the provided link to the website.

2. Click on the Sign In menu item

3. Notice this text

Click on the highlighted link word 'here"

4. A new screen requests confirmation that you are human and not a web bot trying to inappropriately access this site:

Aside

reCAPTCHA [http://www.google.com/recaptcha/learnmore] uses text from scanned content to help digitise on line content.

5.   Please fill in the requested details and click the "I Agree" check box

NOTE: You must use a real email address in order to register successfully

6.   Click the register button and you are returned to the home page showing a Green Message box telling you what to do next

7. Open your email system and check for the email sent you. You may have to wait or refresh a few times to see the new email depending on how busy the internet traffic is.

8. The email contains registration details and instructions on how to complete the process:

   Hi john smith!

   A request to register with the **Southern Highlands** web site was received from this email address - john.smith1234@gmail.com

   To confirm your registration request please click on the following link (or copy and paste it into your browser); otherwise please delete this email.

   http://bdrs-uat.ala.org.au/bdrs-core/portal/10/confirmregistration.htm?key=47bf8f961aa422464ab43449b67cdb4d

   Your username is **john smith** and should be used to sign in to the site.

9. Click on the supplied link and a screen similar to this should be displayed

10. Sign in using your user name and password and you will be directed to the site home page.
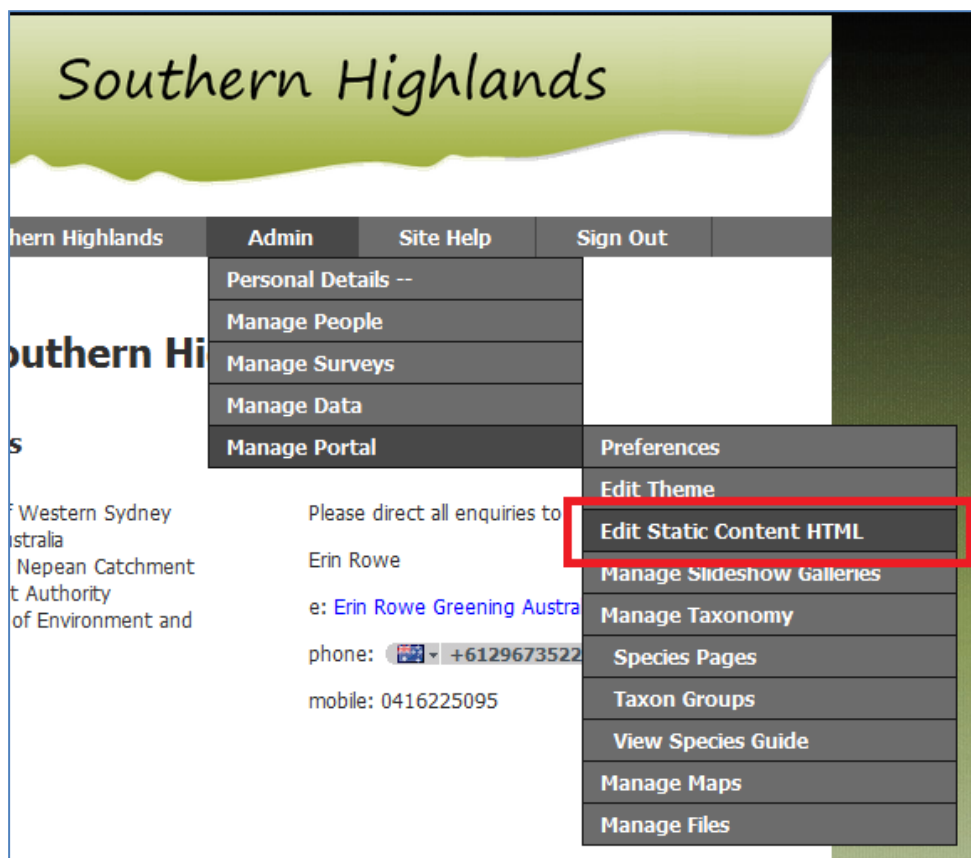
PART 2: MANAGING THE REGISTRATION PROCESS

This part describes the configuration and management of the registration process including how to address the most common issues.

Configuration

There are a number of specific components within each BDRS instance that need to be configured to make user self registration go smoothly.

1. They are accessed via the Admin menu:

2.   Select the content to be edited and save on completion:

3.   Specific HTML content requiring editing:

email/UserSignUp

>   This is the system email reply to the self registering user.

>   You will need to edit the content to include the necessary portal ID number

>   *Example*

>   http://bdrs-uat.ala.org.au/bdrs-core/portal/10/confirmregistration.htm?key=${registrationkey}

email/UserSignUpApproval

>   This one on the other hand implies there is an option to force all registration processes through an administrator.

>   How is this enabled?

user/home

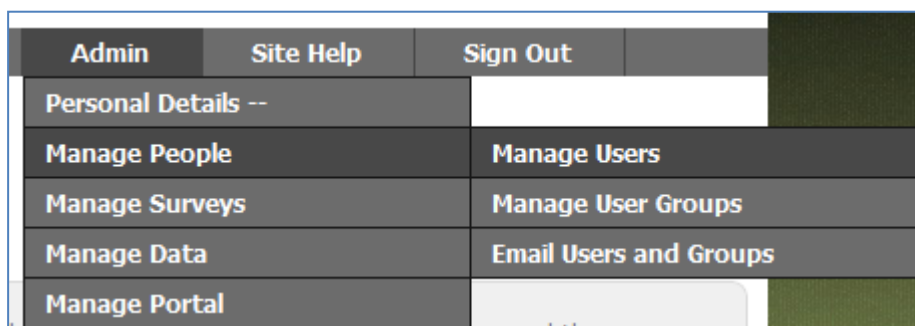The default user home page each time they log in.

OB 11/10/11/ added a redirect to the home page; recommend deleting this option/path – logged in user name should be displayed in all activity pages as well as the header.

Registration Issues

The most common registration issues are usually associated with the affected persons record.

Instructions for accessing specific user records:

1. Open the menu item Admin – Manage People – Manage Users

2. Locate the user entry with problems

3.   Edit their record

Specific Issues

4.   User does not click on the registration link in the email; email goes missing; portal ID not included in email or not working correctly

a.   Click on the active checkbox – Submit to save change; Contact the use to advise issue is resolved

5. User has forgotten password; password needs resetting for some other reason & they are unable to do it themselves:

    a. Enter the new password twice, click Submit; Contact the use to advise resolution status and any follow up actions

TIP

We always recommend using a temporary password (e.g. Password) and advising the user to change to something more secure immediately on successfully entering the site