Registration Codes 3.1 Final

Readme

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Overview

This module replaces the registration and user profile system with something more flexible and powerful. That means using this module requires you to make changes to your core installation. If you are not comfortable doing that, you should not use this module. This module also requires the use of Formulize 3.0 or 3.1 in your site.

If you do use Registration Codes, then it provides you with several advanced features:

- You can create registration codes associated with certain groups in your website. Give the codes to people and they can use them to create accounts in your website and they will be made members of the associated groups automatically.

- The accounts can be activated instantly, or they can require administrator approval, and you can control this on a code by code basis.

- If your site accepts general new user registrations, according to the user configuration setting, then people without codes can create accounts as well (subject to whatever approval options you have set in your site)

- The user profile form can be customized with whatever questions you want. You can also have certain questions appear only to certain groups of users. This lets you customize the profile form for different audiences within your site.

- You can have private questions in the profile form where the answers are hidden from other users, unless they have special permission to view private questions. Each private question can also be made available only to certain groups.

- Codes can have specific redirection locations, so instead of the front page of your site, certain users could be sent to a particular forum or other page after they create their accounts.

- Codes can be marked as "instant account creation" codes, which bypass the profile form altogether. Users who use these codes cannot log in again with the same account, but this is still useful if you want to provide anonymous access to certain information or forms in your site, but not public access (ie: people need to have a code, but you don't care about tracking who they are uniquely)

- There are configuration options controlling:

  - whether anonymous users can see the user profiles or not
  - whether users can view profiles of other users who are not members of the same group(s) as they are
  - what the default notification option is for new accounts, either e-mail or private message

  - You can set expiry dates for your codes, as well as a maximum number of uses (so if you know there are only 20 people who should be using it, any extra people who happen to get the code for some reason won't be able to use it).

  - There is a "User Manager" on the administration side which allows you to move or copy all users from one group to another.

Compatibility

Registration Codes is compatible with XOOPS 2.0.x and should also be compatible with ImpressCMS 1.x. It has been used with XOOPS 2.3, but because the core patch files still use the old filenames from XOOPS 2.0.x, some links in your site that point to the registration page, for example, will be broken. You will need to update them. This module also requires use of version 3.0 or 3.1 of the Formulize module. This module also uses custom versions of three core files in the root of your installation, and one template in the System module.

Fresh Installation

1. Extract the module files and upload them to your server. In the System Admin—Modules area of your website, find the icon for Reg Codes and install the module.

2. Install Formulize 3.1 (or 3.0) if it is not present already. Instructions are in the readme file accompanying Formulize.

3. Copy the files and folders in the *core_patch_files* folder, overtop of the corresponding files and folders in the root of your website. You may wish to make backup copies of the original files prior to this step!

4. Update your system module, in System Admin—Modules.

5. Delete the *core_patch_files* folder from your server.

6. **Optional**: you can run a database patch to allow for longer usernames than the default, if you require longer usernames. This is necessary if you wish to use the module preference that forces the user's e-mail addresses to be used as their username (see **Setting the Preferences** below). To run the database patch, go to the following URL:

   http://www.mysite.com/modules/reg_codes/admin/index.php?op=patch31

   A button will appear on your screen. Click it to update the database for the new features in version 3.1.

Upgrade Installation

If you are upgrading from a previous release of this module, follow these steps:

1. Extract the module files and upload them to your server.

2. Install or upgrade to Formulize 3.1 (or 3.0) if it is not installed already. Instructions are in the readme file accompanying Formulize.

3. Copy the files and folders in the *core_patch_files* folder, overtop of the corresponding files and folders in the root of your website. You may wish to make backup copies of the original files prior to this step!

4. Update your system module.

5. Login to your website with a webmaster account, and type the following URL into your browser:

   http://www.mysite.com/modules/reg_codes/admin/index.php?op=patch31

   A button will appear on your screen. Click it to update the database for the new features in version 3.1.

6. Delete the *core_patch_files* folder from your server.

Using the Registration Codes Module

IMPORTANT NOTE: the entire premise of the Registration Codes module is that the registration codes are not normally public knowledge, and only users who are allowed access to your site have access to the codes. Therefore, as soon as a user successfully completes the registration form, normally their account is automatically created and they are logged in to the site and sent to the front page. There are approval options to require administrators to approve accounts even when they are created using a code, but that is not the default.

THEREFORE, BE VERY CAREFUL WITH YOUR REGISTRATION CODES, SINCE THEY MAY GRANT IMMEDIATE, AND POTENTIALLY ADVANCED ACCESS TO YOUR SITE.

There are two main effects of using the Registration Codes module. Primarily, this module lets you create custom codes that people can use when registering for new accounts at your site. The codes are associated with groups in your site, and when someone creates a new account using a code, their account is automatically assigned to the groups associated with the code they used.

Secondarily, this module lets you create a custom form to replace the non-essential fields that are part of each user's profile. This lets you replace all the questions which are not essential for your site with questions that are more relevant. In addition, all required fields, such as username, e-mail, password, signature, notification options, etc, are still present when people view and edit their account information.

Note that the instant messaging fields are not preserved. So any integration of other modules with the IM fields of the user profile, will be rendered ineffective. It's not that Registration Codes breaks the other modules, it's just that users of your site will not be able to specify their IM contact info as part of the regular account information, and so other modules will not be able to mine that information out of their account information.

Configuring the Registration Codes Module

Configuration is a very simple procedure, but can be confusing because it involves giving some groups permission to create codes that grant membership in other groups. The important thing to keep in mind is that when a webmaster or senior user creates a registration code, they specify which groups that code will grant membership in. Since you don't necessarily want all users to be able to create codes that grant membership in any group in your website, there are configuration options that let you restrict the groups that a user can create codes for.

Normally, you would just let Webmasters create codes for any and all groups, and turn off all access for other groups. But in case that is not adequate for your situation, these configuration options exist to give you the flexibility you need. For instance, you may want to specify that the Toronto Managers group can create registration codes for the Toronto Volunteers group.

To configure the module, follow these steps:

1. Login as a webmaster, and under System Admin—Groups, give the necessary groups access to the module. Normally, you would remove the *module access* permission from the Registered Users group, and only allow Webmasters access to this module. But if there are other groups in your site with certain administrative privileges, then you may wish to grant them access to the module as well.

2. If you want any groups other than Webmasters to be able to control which groups can create codes for which other groups, then assign *module admin* rights for Registration Codes to those groups. **Normally you would only want Webmasters to have admin rights, even if other groups have access to the module, so you can normally skip this step.**

3. Go to the administration page for the Registration Codes module (click on the Registration Codes icon on the left).

4. On the screen that appears, check off the groups on the right side that you want each group to be able to create registration codes for.

   Example: beside where it says "Webmasters" on the left, check off all the checkboxes beside all the group names on the right. This will give the Webmasters group the ability to create registration codes that grant membership in any other group in the system.

   A user can only create a registration code if they are a member of a group which has been granted the right to create a code on this screen. The groups that are checked off represent the groups that a code can grant membership in.

5. Click the button at the bottom of the screen to save your changes.

Setting the Preferences

There are four 'Preferences' options for this module. To change these options, hover the mouse over the *Registration Codes* icon on the left side of the administration side of your XOOPS site. Then click on Preferences.

The first is **whether or not anonymous users should be allowed to view the profiles of your registered users**. By default this is set to 'No' but you can change it if you want anonymous users to be able to view the profiles of registered users.

The second is **what the default notification method should be for new accounts**. The default choice is e-mail, which means that all new accounts will have e-mail set as their preferred notification method. You can change this to private message if you wish.

The third is **whether users can view profiles only of other users who are in the same group(s) as them**. Depending on the complexity of the group structure in your site, you may wish to restrict the visibility of profiles to only users in the same group(s) as other users. For instance, if your site mixes public users and staff users in a joint intranet-extranet type situation, you may not want the public users to be able to view staff profiles! Since the public users should not be members of the same groups as staff users (or at least not all staff users), this option would effectively hide staff profiles from public view.

The fourth is **whether the e-mail address is used as the username**. If this is enabled, then instead of typing a username and e-mail address in the registration form, users will just type the e-mail address and it will serve as both username and e-mail address. If you wish to use this option, make sure you run the "patch31" step of the install or upgrade instructions!

Creating, Reviewing and Deleting Registration Codes

If you are using the Main Menu block in your website, there should be an entry in it now for the Registration Codes module. Click that entry in the menu to create codes, review existing codes, or delete existing codes. If you are not using the Main Menu block, point your browser to this URL:

http://www.yoursite.com/modules/reg_codes/

To create a code, follow these steps:

1. Type in a word, phrase or series of letters and numbers that you would like to use as a code, or leave that box blank to have the system auto-generate a random code for you.

2. Select the group(s) that you want the code to grant membership in from the list of groups at the top of the screen.

    If the group(s) that you want are not listed, then you do not have permission to create a code that grants membership in that group(s). A user with admin access to the Registration Codes module can change that setting (see *Configuring the Registration Codes Module* above).

3. Type in an expiry date for the code in YYYY-mm-dd format.

4. Optionally, specify the maximum number of uses that a code can have. This is useful if you know that a certain code is only supposed to be used by a certain number of people. You can limit the number of times it can be used as an added security measure. Setting this to zero means the registration code will have unlimited uses.

5. Optionally, specify which groups can approve accounts created with this code. All members of selected groups will be sent a copy of the activation e-mail for this account. If you select no groups, then the account will be activated automatically. After you have created this code, you will have the option of specifying the e-mail address of users who are "pre-approved", and can bypass the admin approval step.

6. Optionally, specify a URL where users should be sent after their account is created. By default users will be sent to the front page of your site.

7. Specify whether users should have to complete the full profile form, or whether this code should automatically create an account for them. The default is for users to complete the profile form and in most cases, you will not want/need to change this.

The instant account creation option is useful in situations where you have otherwise anonymous users visiting your site, but in order to organize and categorize information they are providing you with, you need to associate these users with certain groups in your site. It is also useful if you want to have anonymous access to information, but not public access – you can restrict access to your site without requiring identifying information from your users.

With an instant account creation code, these users can come to your site, type in the registration code, perform the required task(s) and leave, without the hassle of actually having to create an account themselves. From an administration point of view, you then have their information associated with a particular group, just as if a "real" user had entered it.

Auto-generated codes are randomly generated strings of letters and numbers. This is partly as a security measure, and partly to make it less likely that users will enter the wrong code (ie: they're less likely to be mixed up).

Creating the Custom Profile Form that is Used for Your Site

The Registration Codes module integrates with the Formulize module to provide a custom form for use as part of the account creation process, and also on the *Edit Account* and *View Account* screens.

To create this form, follow these steps:

1. Create a new form in the Formulize module. Refer to the Formulize 3.0 readme for more information. Make sure you give the *Registered Users* group and the *Anonymous Users* group the following three permissions for the form that you create: view_form, add_own_entry and update_own_entry.

2. Once you have completed the form, go to System Admin—Modules and update the Formulize module.

3. Go to the *main* administration screen for Formulize and click on "Modify the Preferences" near the top of the screen.

4. Beside where it says "Which form is to be used as part of the registration process…" select the form you just created, and click the **Go!** Button.

Note that *Formulize* lets you specify that certain elements in a form should be visible only to certain groups of users. You can use this feature to add custom questions that are only relevant to certain users within your site.

Formulize also lets you specify that certain elements in a form should be private, and their contents only visible to the person who typed in the information, and to groups of users who have the special view_private_elements permission for this form in *Formulize*. In conjunction with the custom visibility options, this lets you create a very intricate profile form that shows unique questions to various different audiences in your website.

How People Use a Registration Code to Create an Account

Clicking on "Register now!" in the login block

The most common way to create an account is to click a link that leads to the registration page of the site. When users do this, they will have the option of entering a valid registration code. If your site is set to accept general new user registrations, there will also be a link that allows them to create a basic account that is only a member of the Registered Users group.

Once a user has typed in a code (or clicked the link for a basic account), the customized account creation form will appear, and users can fill in their information.

If the code the users typed is an "instant account creation" code, then they will bypass the form and instead be redirected to either the front page of your site, or another page that you specified for users of that particular code.

Important Note: to create a basic account that is only a member of the Registered Users group, people can use the code "nocode", but only if your site is set to accept new registrations – if your site is set to not accept new registrations, then "nocode" is disabled, but any other valid registration code can still be used. If "nocode" accounts are allowed, there will be a link on the first registration page that users can click to create an account, if they do not have a code.

Putting a code in the URL

An alternative method of reaching the registration form is to use a special URL that users can type into their browser, or which can be embedded in the website, or include in an e-mail message. The format of the URL must be:

http://www.mysite.com/register.php?code=abc123

When users go to such a URL, they will automatically be presented with the customized account creation form.

Note that if the code in the URL is an "instant account creation" code, the user will automatically have an account created for them and they will be redirected to either the front page of your site, or another page that you specified for users of that particular code.

Approval of Accounts and other Messaging Options

If you create a code where the accounts created with that code require approval, the account creation process is slightly different than the normal process. The first thing that happens is that users must confirm their e-mail address, by clicking a link in an e-mail message that they receive. After that, administrators will be sent an approval message allowing them to activate the account if they choose.

This extra step ensures that the e-mail address the user typed in is in fact their e-mail address (assuming no one has hacked their e-mail account!).

Note that if you do not have "Activation by administrators" set as your site's account approval preference, the users will not receive a notification from the site after the administrator approves their account. We recommend you set " Activation by administrators" as your site's preference (under System Admin->Preferences-> User Info Settings).

If a user registers with "nocode" and your site requires new accounts to be either confirmed by the user, or approved by a webmaster, then the appropriate activation and confirmation messages will be sent.

If your site is set to notify a certain group when new accounts are created, those notification messages will be sent accordingly.

"Welcome" Messages for New Users

You can also create a "Welcome" message that will be sent to new users after they create their accounts. You can create a custom welcome message for each registration code. You could even create one for "nocode" so that users who create basic accounts get a "Welcome" message too.

To create such a message, simply write the body of the message you want, and save it as a plain text file with a filename like the following: "afuj45.tpl", ie: make the name of the file the same as a certain registration code, and use a .tpl extension. Then, when that registration code is used to create an account, that message will be sent to the new user.

Upload the file to the main languages/english/mail_template folder in your site (or whatever language(s) you want the message to be sent in). Note: you **do not** place this file in the reg_codes/languages/english/mail_template, it must go in the main languages folder off the root of your website.

More Information and Support

Freeform Solutions is actively developing Registration Codes, in conjunction with *Formulize*, with support from the community. You can post issues, questions, feedback, problems, etc on the support forums at http://www.freeformsolutions.ca/formulize. We will attempt to respond to all postings as soon as possible.

If after setting up the module, you are getting a blank page after entering a registration code in your site, please re-read this document carefully and make sure you have followed each step. All steps are important, and certain steps are critical, such as setting the form permission in *Formulize*, and updating *Formulize* after creating your form and then selecting that form in the *Formulize* preferences as the user profile form.