

Installation Guide for NPYM Admin System

The NPYM Admin System is used to maintain attender, meeting contact, and committee membership records to provide online access to that information.

INSTALLATION

Download the installation zip using the link found at https://npym.org/npym_admin_system .

Upload that file to the root folder of your web site, or to a location of your choice.

When the uploaded file is unzipped, it will save the following files and folder into the directory where it is extracted:

<code>./admin_system</code>	a directory containing the admin system
<code>./showDirectory.php</code>	a file that provides access to the attender directory listing
<code>./showMeetings.php</code>	a file that provides access to an organization directory listing
<code>./showCommittees.php</code>	a file that provides access to a committees directory listing
<code>./showHistory.php</code>	a file that provides access to a summary of Annual Sessions
<code>./show_config.php</code>	a file used by other <code>./show...</code> files to access the <code>admin_system</code>

After extraction of the above files the web site administrator might choose to rename the “`admin_system`” folder to something deemed more appropriate. This only affects people who will be logging into the admin system as administrators – since they need to know the name of the directory.

An install file is located at `./admin_system/install.php` . However, before running that install script the administrator must create a new MySQL database for use by the `admin_system`, and determine what email addresses should receive email related to the admin system (such as system content change requests), and what email address should be used when the system sends an email to anybody requesting access (typically no-reply@<your host.org>).

When you execute the install script, it will provide a form in which to specify the above-mentioned email addresses, database access information, and your organization name. The required information includes database host address (including port number... e.g. localhost:3308), database name, database user name and database user password.

After successfully running the install script a link is provided in the success page to log into the system. Log in as username “admin” with password “admin”. After login immediately click the “users” link in the system left sidebar, and change the admin password.

If any attempt is made to re-run the install script it will reply that installation has already been run and display the same welcome page information that followed the initial successful installation.

If it becomes necessary to re-run the install script the system administrator must first remove the file “`./admin_system/includes/config.php`” and DROP all database tables created by the install script.

Installation Guide for NPYM Admin System

LOADING ATTENDER AND MEETING DATA

Three scripts are provided to facilitate initial loading of meeting, attender and meeting contact information from spreadsheet-sourced data files. These three scripts may be accessed directly by a logged in system administrator. They may also be accessed from buttons provided in relevant pages of the admin system. Those buttons are “import attenders”, “import meetings”, “import meeting contacts”.

Loading data must be done in a particular order:

- 1) Load data to describe any meetings that are not yet known to the system and that will be referenced by new attender data. (script: `./admin_system/upload_meetings.php`)
- 2) Load attender data (script: `./admin_system/upload_attenders.php`)
- 3) Load meeting contact information. (script: `./admin_system/upload_meeting_contacts.php`)

When you navigate to one of the upload...php scripts, they provide further guidance about the nature of the expected uploaded data, and provide a form in which you can identify a file to be uploaded.

Three files are provided as starting points to define meeting, attender and contact input data fields.

- `./admin_system/includes/sample_meetings_upload.tsv`
- `./admin_system/includes/sample_attenders_upload.tsv`
- `./admin_system/includes/sample_meeting_contacts_upload.tsv`

Download these three files, and click on the downloaded files to open them in Excel or OpenOffice.

Note: you do Not need to fill in all of the blanks in a row of data. Only basic identifying information is required. A recommended approach would be to create a few rows of data and run an upload to see the results. Warning and error messages will help you pin-point issues that were detected and reference the row of the input file for each case.

The first meeting upload file should contain a record for your yearly meeting, followed by a record for a quarterly meeting under the care of that yearly meeting, followed by a record for a meeting or worship group under that care of that quarterly meeting. You may choose to load records for all quarters within the yearly meeting in that initial upload, or not. The main thing to consider is that references may only be made to a yearly meeting, or quarterly meeting, or meeting, or worship group if that entity has previously been loaded into the system.

Attender data may be loaded for any meetings or worship groups that have already been loaded. Note that the following fields are required: Meeting, LastName, FirstName, and AttenderType. Whenever a field is filled that has a related “...Type” field the related type field is required.

AttenderType: Attender, Junior Attender, Member, Junior Member, Sojourner, Young Friend, Other
RelationshipType: Spouse, Partner, Parent, Child, Step Parent, Step Child, Grandparent, Grandchild, Housemate, Roommate, Cohabiting, Other, Unknown

Phone1Type and Phone2Type: Announcement, Message, Mobile, Fax, Home, Work, Skype, Other

Meeting contact data may be loaded to connect previously loaded attender data to previously loaded

Installation Guide for NPYM Admin System

meeting data.

If you re-run an upload containing previously uploaded data the duplicate rows will be skipped with appropriate warning messages.

When first getting started with data uploads, you should view the initially uploaded data through the admin system user interface to get a feel for where to find that data and a sense of how it may be amended.

All uploaded data may be edited, deleted, or supplemented through the administration pages of the admin system. Navigate to the area of interest using the left sidebar of the admin system interface.

Under normal use of the admin system, data is rarely/never uploaded in bulk. Rather, it is entered manually. However, if a new meeting or worship group needs to be added in the future and attender data can be supplied for bulk upload – that option remains available.

REPORTS

There are internal reports available to a logged in admin system user, and there are publicly accessible reports. The publicly accessible reports are provided through the four php files that exist outside of the admin_system directory:

- showDirectory.php
- showMeetings.php
- showCommittees.php
- showHistory.php

Only “showDirectory.php” requires user login, as it displays attender contact data. The other reports are considered to be public information that does not require login. If your yearly meeting determines that those other reports should require login, your web site administrator (if they know PHP) should be able to copy relevant code from showDirectory and apply it for use in the other cases.

The manner in which showDirectory users gain access to the attender report is as follows:

1. A new user enters their preferred email address and clicks either “Forgot Password” or “Register”. [NOTE: administrator user accounts are Not automatically in the attender table.]
2. If the supplied email address is not yet associated with any uploaded attender an error message tells the user that they are not in the database. [The approach here is that only persons who are recognized attenders should have access to the information in the database about other attenders.]
3. If the supplied email address is associated with an uploaded attender an email is sent to that email address with a link to permit the user to establish a new or updated password for future access to the system.
4. After the user receives the welcome email from the system, clicks a contained link, and sets a new password, they are invited to log into the system.
5. At that point (or after initially supplying a valid username and password) the user may qualify

Installation Guide for NPYM Admin System

the type of attender report they want to view (in showDirectory) – to view the entire attender data of the yearly meeting, all attenders within a Quarter, or all attenders of a specific meeting or worship group.

The four show...php report files may be wrapped in an outer layer to appear similar to the site in which the admin system is used. This would be a matter to discuss with your web site administrator.

Reports displayed by the system have a “Quaker gray/grey” background. This may be manually modified by the site administrator in ./admin_system/css/admin_style.css and ../print_style.css.