Community Weaver 2.1 Features

Documentation for Coordinators

Updated: January 30, 2013

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Introduction to Features

It is important to understand the implications for each feature before you enable it in your Timebank. To prevent unexpected change, please read the instructions, especially the defaults and warnings for each feature <u>BEFORE</u> you enable it.

Community Weaver 2.1

Primary Coordinators will now find a new link “**Community Weaver Plugins (Features)**” in the Control Panel.

1. Go to your **Control Panel**,
2. in the section **Customize Your Timebank**,
3. the last link in that section is “**Community Weaver Plugins (Features)**”

You will find a list of features that can be enabled (check mark in the box) or which can be disabled (no check mark in the box). Please note that the feature “**CW2.1 Plugins”** must always be enabled for the CW 2 features to function. This plugin is the framework that enables the use of other features. Also always leave the feature “**Control Panel Features Link**” enabled. (It provides the link in your Control Panel to the manage features page.)

The features will not cause any changes until they are actually enabled. Primary Coordinators will be able to enable these features.

Background Information

A "feature" is a goal or task that is achieved by enabling a “feature module” that is created by the Drupal “Features module”. When enabled it will provide a new set of functionality for your Community Weaver site.

Features overwrite the existing configurations and settings. They do not overwrite your content information (members, service ads, exchanges, etc.). The features in this roll out are improvements to community Weaver and do not provide a way to return to the settings that existed before the feature was first enabled.

After a new feature is installed and enabled, it still might be overridden by the previous settings in your Timebank. To fully implement the feature, you may tell it to ignore the current settings and revert to the configuration as defined in the new feature. The step-by-step instructions are provided in each feature's documentation.

Please see the glossary for descriptions of the terms used in this documentation.

Important Notes:

For the step-by-step procedures in each feature's documentation:

1. While enabling or disabling features, you may be directed to a page labeled “**Cleanup.**” Watch for that page. If that happens,

- **always click on the button:** “**LEAVE ENABLED**”
- Do not click on “DISABLE SELECTED MODULES”

2. Unless you have site-admin access and want to create new features, **do not use the links** to: “Create Feature,” “Recreate,” “Download Feature,” or “Features Testing”

3. You can click on the state of each features module ("Default", "Disabled", "Overridden" or "Needs Review") to see the dependencies and variables that are set by this feature. This is unlikely to be of use to you unless you are a site-admin.

Glossary of Terms for Drupal Features

The terms Features module, feature module and feature can at time be confusing. For a better understanding of the terms we provide this glossary of terms that has been gleaned from various Drupal web sites and tutorials.

- **Features module** – The Drupal module that enables developers to capture configurations into code and create a feature module that can be transferred to another Drupal site.
- A **feature module**- a module generated by Features, which stores configurations of other modules, e.g. a content type or a View, in code. From the Drupal core it can contain content types, permissions, input filters, and some menu items. From contributed modules it can contain Contexts, Views, Image Cache presets and Chaos Tools (Strongarm, Panels, Feeds, Data, etc.).
- **feature** – The goal or task that is achieved by the a feature module that is created by the Features module.
- **Configuration** – the site's attributes or settings that describe how the site will behave.
- **Default** - if a feature is described as 'default', it means that the code that is running is that which is stored in your feature, not what might be in the database.
- **Overridden** - a feature is overridden either: when a new feature is enabled and its settings are different from those currently in the site's database, OR when an administrator uses a module's user interface (UI) to make configuration changes. In both cases, the configuration settings in the database, *override* what is stored in code in a features module.
- **Disabled** - a feature is a module, and therefore must be enabled before it can be used. Otherwise, it is *disabled*. Disabling a feature module does not necessarily return your site to the status and configuration it had before the feature module was enabled.
- **Revert**- if a feature has been overridden, it can be reverted. This means that the configuration in the database is deleted or overwritten and the settings defined in code, in your feature module, are used for your site.
- **Update** - updating an overridden feature will ensure that the configuration information of the feature defined in the feature module is changed to match the configuration stored in the site's database.

Email and Phone – choose visible or hidden

Enable members to hide or reveal their email address and phone number to other members.

Description

- This feature will enable each member to choose to hide or reveal their email address and phone number on their profile. If phone number and email address are made visible they will only be seen by other time bank members.
- Two new check boxes will appear at the bottom of each member's profile when they click on "Edit Profile Details" on their profile page. They are:
  - "Make Phone Public Do you want your phone number to be visible to all members?"
  - "Make Email Public Do you want your email address visible to all members?"
- If a member selects the check box and saves the profile, their email address and/or phone number will be visible on their profile page for all other members to see. If there is no check mark in the box, the phone number or email address will be hidden from view. A member can change the settings in their own profile at any time.

Additional information

- The feature does not make the member's email address or phone number visible in any offers or requests. It only provides this information to the member's profile.

Default settings

- **Existing members:** <u>Hidden</u> (no check mark) is the default for both email address and phone number. If an existing member wants to reveal their email address or phone number, they will have to sign in and change the settings in their profile.
- **New members:** <u>Visible</u> is the default for both email address and phone number. This applies to an account created by a coordinator as well as to an account created by a new member. If a new member wants to hide their email address or phone number, they will have to sign in and change the settings in their profile.

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, having no option for visible or hidden telephone and email fields.
- If you disable this feature after you have enabled it, members will lose access to their profile view, because it will not be replaced by the view used before this feature was first enabled.
- Disabling the feature will not delete any data.
- Re-enabling the feature will reinstate access to the members' profile views as defined in the feature.

Warnings

- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature “**Email and Phone – choose visible or hidden**.**”**
2. Click on “**SAVE SETTINGS”** at the bottom of the page.
3. If you are taken to a “Cleanup” page, click on “**LEAVE ENABLED**”
4. The state of this feature will show “**Overridden**”.
5. Click on the “**Overridden**” link for this feature.
6. Select the check box next to “**Views**” which has the status “**Overridden** .”
7. Click on “**REVERT COMPONENTS**”

- You will see the message: “Reverted all **views** components for **private_profile_email_phone**.”
- The status of “**Views**” will now be “Default.”
- The feature is now fully enabled and you can navigate to any other page.

Member Roster: Improvements for Members

Members can choose among several sort methods for the roster of members.

Description

- This feature enable members to view and sort the Active Member Roster. This is the list accessed by the sub-tab “View All Members” below the “Give & Receive” tab.
- It enables members to sort the list by the columns:
  - “Name” (using the first name and then the last name) - from A to Z or from Z to A .
  - “Username” - from A to Z or from Z to A .
  - date “Joined” - from most recent to oldest, or the other way around.
  - “Last Login”, from most recent to oldest, or the other way around.
  - “Distance”, from closest to most distant or vice versa.
- This column cannot be sorted:
  - by “Location” (City, State)
- To change the sort order of the column, click on the column header.
- This feature does not change the members possibility of filtering by name, neighborhood or affiliation.

Default settings

- The default sort method (seen when a member first choses this page) is by “Name” from A to Z

Important Information

- When the member refreshes the browser page, the sort order will revert to the default.
- It also only applies to the “Active Member Roster” that can be chosen with the “View All Members,” the sub-tab below the “Give & Receive” tab and does not apply to the “Admin Member Rosters and Reports” that the coordinators can access via the Control Panel.

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, using the previous Member Roster design.
- If you disable this feature after you have enabled it, members will lose access to the view, because it will not be replaced by the view used before this feature was first enabled. The sub-tab “View All Members” will also disappear.
- Disabling the feature will not delete any data.
- Re-enabling the feature will reinstate access to the view as defined in the feature and will make the “View All Members” sub-tab visible again.

Warnings

- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature “**Member Roster: Improvements for Members**.”
2. Click on “**SAVE SETTINGS”** at the bottom of the page.
3. If you are taken to a “Cleanup” page, click on “**LEAVE ENABLED**”
4. The state of this feature will show “**Overridden**”
5. Click on the “**Overridden**” link for this feature.
6. The next page will show you a list of dependencies. Select the check box next to “**Views**” which has the status “**Overridden** .”
7. Click on “**REVERT COMPONENTS**”

- You will see the message: “Reverted all views components for member_roster_improvements_for_members.”
- The status of “Views” will now be “default”
- Now the feature is fully enabled and you can navigate to any other page.

Messages: Access denied - Page not found

Members clicking on links in email notifications will be offered a login opportunity.

Description

Members receive notification emails from Community Weaver. That email includes a link to the actual message or an exchange, etc. located within Community Weaver.

- Current CW 2 behavior: If the member who clicks on that link is not logged in, they usually received a “Page not found” error message.
- Feature behavior: If the member who clicks on that link is not logged in, they will get this message:

  “Sorry...

  Either you're not logged in to your Timebank or you don't have access to this page or the page does not exist.

  If you are a Timebank member, please login to the website and try the link again.”

- After they login, they will be taken directly to the link in the notification.
- If they are not allowed to access the page or if the page does not exist, they will be taken back to the message above.

Default settings

This is the error message that all users will see if they try to go to a page that:

- does not exist, or
- they are not allowed to access, or
- they cannot access because they are not logged in.

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, using the previous error messages.
- If you disable this feature after you have enabled it, members will continue to see the error page as created by this feature.
- Disabling the feature will not delete any data.
- Since the previous error messages were less helpful then the new ones, there is probably no reason to return to them.

Warnings

- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature, for example if you have customized your error messages. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature “**Messages: Access denied - Page not found**.”
2. Click on “**SAVE SETTINGS”** at the bottom of the page.
3. If you are taken to a “Cleanup” page, click on “**LEAVE ENABLED**”
4. The state of this feature will show “**Overridden**”
5. Click on the “**Overridden**” link for this feature.
6. Select the check box next to “**Strongarm**,” which has the status “**Overridden** .”
7. Click on “**REVERT COMPONENTS**”

- You will see the message: “Reverted all **variable** components for **friendlier_access_denied_page**.”
- The status of “**Strongarm**” will now be “Default.”
- Now the feature is fully enabled and you can navigate to any other page.

Multiple email addresses allowed

Two or more accounts can now use the same email address. Useful for buddies, business & private accounts, family accounts, etc.

Description

- This feature allows an email address to be used for more than one account. In other words, two or more Community Weaver accounts can have the same email address. Without this feature an email could only be used once in each Community Weaver timebank.
- For security, each account should use a different password.
- When coordinators create a new account with an email address that is already used for another account in your timebank or if they enter an existing member's email in another CW account, they will receive a warning "The e-mail address you are using has already been registered on this site by another user." and the duplicate email address will be successfully saved to the account.
- Coordinators who have permissions to edit a member's profile can change the email addresses to one that is already used by another member.
- All notifications about the newly created accounts will, of course, go to the email address that was entered for the new account, even if it is shared with another account.
- The account that first used an email address becomes the 'parent' email address whenever that email address is entered for another account. (The implications of this fact are explained in the warnings below.)

Additional information

This feature can be used for the following situations:

- A Timebank member has no email, no email access or cannot use email and wants all the email to go to another Timebank member (a buddy) who will manage all email for his/her account.
- A family wants to have separate accounts for each family member and wants all email notifications to go to a single email address.
- A person wants 2 Timebanks accounts (for example: one for private use and one for business use) and wants to use the same email address for both.
- An organization wants to have separate Timebank accounts for different staff, different projects or for other reasons and want to have all email communication about these different accounts to be sent to a single email address.

Can I disable this feature?

- The Primary Coordinator cannot return to the configuration in which duplicate email addresses are not allowed.
- If you disable this feature after you have enabled it, the feature is still active. Removing the check mark will not disable the configuration.
- Disabling the feature will not delete any data.
- If you have enabled it and have started to use multiple email addresses, is it not advisable to

attempt to return to the previous configuration in which duplicate email addresses are not allowed.

Warnings

Note 1. The feature will soon be updated to prevent new users from using an email address in use by another member. Only coordinators that have permissions to edit a member's profile will be able to enter an email address that is already in use by another member of the Timebank. This will eliminate the issues 2, 3, 4, and 6 listed below (highlighted in orange). We strongly suggest that coordinators do not inform prospective members that they may enter an email address that an existing member already uses.

Note 2. It will important that all coordinators are aware of all the highlighted items below.

- The login for the first account that is assigned a certain email address (the 'parent' account) can continue to login with either the 'username' or the email accounts. The second and additional accounts that are assigned the same email address that is used by the 'parent' account can no longer login with that email address. The additional accounts can only use the 'username' to login to Community Weaver. This would cause confusion in Timebanks where the members have been taught/requested to use only their email address to login.
- Because all notifications about the newly created account will go to the email address that was entered for the new account, if the new user does not have access to that account (they intentionally or unintentionally use someone else's email address) they will not receive any notifications about the new account.
- If a new user creates a new account and does not see the notification from the first new account that they create (for example if they do not notice that it landed in their spam folder) they often try to create another new account.
  - Before this feature was enabled, CW would not allow that to happen because it would tell the user that the email was already in use and would not allow a new account to be created.
  - With this feature enabled they can create any number of additional new accounts using the same email address. Therefore it will now be up to the coordinators to notice multiple accounts that were unintentionally created with the same email address.
- The feature can be misused because anonymous users can create new accounts, intentionally using another member's email address. There is no easy way for a coordinator watch for this type of error.
- This feature, which is being implemented as a work-around for missing 'Guardian Angel' features, does not keep the coordinators informed with email notifications as 'Guardian Angel' did.
- If a new account uses a duplicate email address (by accident or intentionally) Community Weaver does not inform the coordinator of the event.
- Coordinators cannot look at a members profile and see that they are (or are not) using an email address that is also used by another account.
- There is a cumbersome work-around for coordinators to find accounts with the same email address. A coordinator can export the list of members, creating a csv file, import the csv file into a spreadsheet or database program and then sort for or search for identical email addresses.

Since a csv export is snapshot of the list of members at any one time, this process will needs to be repeated whenever a coordinator to have up-to-date members lists to check for accounts with the same email addresses.

- There is no way to determine which of the duplicate email accounts is the 'parent' account (the account that can use the email address to login), other than trial and error.
- If coordinators want to keep track of which accounts have duplicate email addresses and which accounts have the 'parent' account, they will need to make their own notes.
- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature "**Multiple email addresses allowed**."
2. Click on "**SAVE SETTINGS"** at the bottom of the page
3. If you are taken to a "Cleanup" page, click on "**LEAVE ENABLED**"
4. The state of this feature will show "**Overridden**"
5. Click on the "**Overridden**" link for this feature.
6. Select the check box next to "**Strongarm**," which has the status "**Overridden** ."
7. Click on "**REVERT COMPONENTS**"

- You will see the message: "Reverted all views components for "Reverted all **variable** components for **buddies_email_address**."
- The status of "**Strongarm"** will now be "Default."
- Now the feature is fully enabled and you can navigate to any other page.

Notifications about New Accounts More Informative

Email messages to users and to coordinators about new registrations will be more informative and more secure.

Description

- For improved security, email notifications to new users will no longer include their password.
- The email template for notifications sent to new users after they (the prospective user) creates an account is:

  USERNAME,

  Thank you for registering at NAME OF TIMEBANK. Before membership is granted, we need you to confirm your email address by clicking on this link or copying and pasting it in your browser:

  NEW USER LOGIN LINK

  This is a one-time login link, so it can be used only once.

  After completing this process, you may login with your username and password.

  -- NAME OF TIMEBANK team

- The email template for notifications sent to new users after <u>the coordinator</u> creates a new account is:

  USERNAME --

  A site administrator at NAME OF TIMEBANK has created an account for you, with this username: USERNAME

  Before membership is granted, we need you to confirm your email address by clicking on this link or copying and pasting it in your browser:

  NEW USER LOGIN URL

  This is a one-time login link, so it can be used only once.

  After completing this process, you may login to NAME OF TIMEBANK with your username and password.

  -- NAME OF TIMEBANK team

- The email template for notifications <u>sent to the coordinator</u> about the new account is:

  Month DD, YYYY - XX:XXpm
  "username" (http://TIMEBANK.timebanks.org/users/username) has created account.
  name@domain.domain

Edit user: http://TIMEBANK.timebanks.org/user/XXX/edit
Delete User: http://TIMEBANK.timebanks.org/user/XXX/delete

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, using the previous notification messages.
- If you disable this feature after you have enabled it, it will not disable the new notification email messages to new members. They will not be replaced by the messages used before this feature was first enabled.
- Disabling the feature will not delete any data.
- Re-enabling the feature will also not generate any changes.

Warnings

- **Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.**

To enable the feature

1. Enable (select check box) for the features "**Notifications about New Accounts More Informative**."
2. Click on "**SAVE SETTINGS"** at the bottom of the page.
3. If you are taken to a "Cleanup" page, click on "**LEAVE ENABLED**"
4. The state of this feature will show "**Overridden**"
5. Click on the "**Overridden**" link for this feature.
6. Select the check box next to "**Strongarm**" which has the status "**Overridden** ."
7. Click on "**REVERT COMPONENTS**"

- You will see the message: "Reverted all variable components for informative_email_messages."
- The status of "Strongarm" will now be "Default."
- Now the feature is fully enabled and you can navigate to any other page.

Service Ad Lists: Improvements for Coordinators

Improvements to the coordinator's displays of Service Ads, including CSV download of expired ads.

Description of changes made by this feature

- The Service Ads reports in the Control Panel are improved. They show the following information for each service ad.
  - All Current Offers and Requests:
    - Category: Main category and sub-category are visible, (new)
    - Service Ad: type of service ad,
    - Service Ad: title of ad,
    - Service Ad: excerpt from the body of the service ad.
  - Offers and Requests:
    - Category: Main category and sub-category are visible, (new)
    - User: name of member,
    - Offer: title of service ad,
    - Offer: excerpt from the body of the service ad,
    - Updated: date the service ad was updated (created or edited), (new)
    - Expires: date of expiration.
  - Expired Service Ads
    - User: name of member,
    - Offer: title of ad,
    - Offer: excerpt from the body of the service ad,
    - Expired: date of expiration.
    - Expired Service Ads can be exported as a csv file. (new)
- For all of the above lists:
  - Sort order of all active service ads is the most recent date it was updated (created or edited). (new)
  - The service ads are not sorted by categories. (new)
  - Dates are shown as real date, not in since format. (new)
  - Sort order cannot be changed.
  - Filtering ability remains.

Default settings

Most recently updated is at the top of the list.

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, the previous configuration of the service ads reports for coordinators.
- If you disable this feature after you have enabled it, the coordinators reports for Service Ads will no longer function, because they will not be replaced by the view used before this feature was first enabled. In fact, the Control Panel section "Service Ads" will disappear.
- Disabling the feature will not delete any data.
- Re-enabling the feature will reinstate access to the reports for Service Ads. Also, the Control Panel section "Service Ads" will be reinstated.

Warnings

- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature "**Service Ad Lists: Improvements for Coordinators**."
2. Click on "**SAVE SETTINGS"** at the bottom of the page.
3. If you are taken to a "Cleanup" page, click on "**LEAVE ENABLED**"
4. The state of this feature will show "**Overridden**"
5. Click on the "**Overridden**" link for this feature.
6. Select the check box next to "**Views**" which has the status "**Overridden** ."
7. Click on "**REVERT COMPONENTS**".

- You will see the message: Reverted all views components for service_ads_coordinators.
- The status of the "Views" will now be "Default."
- Now the feature is fully enabled and you can navigate to any other page.

Service Ad Lists: Improvements for Members
Improvements to the member's displays of Service Ads.

Description of changes made by this feature

- The Service Ads reports for members are improved. They show the following information for each service ad.

    - View All Service Ads:
        - Category: Main category and sub-category are visible, (new)
        - Service Ad: type of service ad,
        - Service Ad: title of ad,
        - Service Ad: excerpt from the body of the service ad.

    - View All Offers and View All Requests:
        - Category: Main category and sub-category are visible, (new)
        - User: name of member,
        - Offer: title of service ad,
        - Offer: excerpt from the body of the service ad,
        - Updated: date the service ad was updated (created or edited), (new)
        - Expires: date of expiration.

- The list of Service and Requests shown under each users "My Account" now shows:
    - Current Offers and Current Requests:
        - Title: title of service ad,
        - Category: Main category and sub-category are visible, (new)
        - Updated: date the service ad was updated (created or edited), (new)
        - Expires: date of expiration.

- For all of the above lists:
    - Sort order of all active service ads is the most recent date it was updated (created or edited). (new)
    - The service ads are not sorted by categories. (new)
    - Dates are shown as real date, not in since format. (new)
    - Sort order cannot be changed.
    - Filtering ability remains.

Default settings

Sort order of the lists are: most recently updated at the top of the list.

Can I disable this feature?

- The Primary Coordinator cannot return to the previous configuration, the previous configuration of the service ads reports for members.
- If you disable this feature after you have enabled it, members will lose access to the reports of service ads for members. They will not be replaced by the view used before this feature was first enabled. Members might see a "Page not found" error message. Also, the tabs under "GIVE & RECEIVE" for viewing service ads will disappear.
- Disabling the feature will not delete any data.
- Re-enabling the feature will reinstate access to the reports of service ads as defined in the feature. It will also reinstate the tabs under "GIVE & RECEIVE" for viewing service ads.

Warnings

- Consult with your site-admin to deal with any customizations implemented by the site-admin that may be influenced by this feature. If you have no site-admin, you may ignore this warning.

To enable the feature

1. Enable (select check box) for the feature "**Service Ad Lists: Improvements for Members**."
2. Click on "**SAVE SETTINGS**" at the bottom of the page.
3. If you are taken to a "**Cleanup**" page, click on "**LEAVE ENABLED**"
4. The state of this feature will show "Overridden"
5. Click on the "Overridden" link for this feature.
6. Select the check box next to "Views" which has the status "Overridden ."
7. Click on "**REVERT COMPONENTS**"

- You will see the message: Reverted all **views** components for **service_ads_members**.
- The status of the "**Views**" will now be "Default."
- Now the feature is fully enabled and you can navigate to any other page.