



Membership System

Installation Guide

Version 1.8

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1 Document control

Date	Author	Details
23/05/18	Andy Harbach	Initial release.
05/06/18	Andy Harbach	Updated to include filesystem changes for 1.6 release. Added details of how to upgrade to a new version.
13/07/18	Andy Harbach	Updated to include password policy details for release 1.8

2 Introduction

The Snowdonia IT Services Membership System is designed to allow the secure storage of members' details for clubs, societies, mountain rescue teams and other similar organisations.

This document describes the steps required to install the system.

This document assumes you are comfortable managing databases, transferring files, and editing configuration files, all using tools supplied by your web hosting provider.

If you are not comfortable installing the Membership System yourself, please contact us and we will provide a quotation to install it for you.

For details on administering and configuring the system once it has been installed see the Membership System Administration Guide.

3 Pre-requisites

The Membership System is web-based and requires the following to operate:

- A web hosting package including Apache, PHP 7.x and MySQL 5.6 or greater
- The following PHP extensions (if not compiled in to PHP)
 - php_zip
 - php_xml
 - php_gd2
 - curl
 - json
 - openssl
- Cron task scheduling for sending out automatic emails

It is highly recommended that you install an SSL certificate to ensure confidential information transmitted between your web browser and the system is protected.

If you do not already have a hosting package that meets these requirements we have experience using the Membership System on the *Cloud Web Hosting* package from [Tsohost](#). At the time of writing, this includes a free Let's Encrypt SSL certificate.

4 What is provided

When you purchase the Membership System you will be given a zip file containing the following:

- A *scripts* folder

- An *export_import* folder
- A *public_html* folder
- A *src* folder
- A *vendor* folder
- A *membership.ini* file

If any other files and folders are supplied, they are for development or testing purposes and should not be used on a live system.

5 Configuring the database

Using the tools provided by your hosting provider, create a new MySQL database, and user. Give the user full permissions to access the database. Make sure you take a note of the following:

- The hostname or IP address of the database server
- The name of the database
- The name of the user connecting to the database
- The password used by the user connecting to the database

Import the file *setup.sql* from the *scripts* folder in to your database.

6 Installing the application

Copy all files from the *public_html* folder to the web root of your hosting. This is usually done using ftp, and the web root is usually a folder called *public_html*. However, this may vary depending on your chosen hosting provider.

Copy the folders *export_import*, *vendor*, *src*, *updates* and the file *membership.ini* to a location outside your web root. It is recommended that you use a location one level up from your web root. This folder must be writable by your webserver.

7 Setting file paths

If you have put the above folders and *membership.ini* file in a location other than that recommended above, you will need to tell the system where they are located. If you have put them in the recommended location, you may skip this step.

Edit the file *public_html/includes/configure.php* and change the constants *SITE_ROOT* and *EXPORT_IMPORT_FOLDER* to match the location of your *membership.ini* file and *export_import* folder respectively.

For example, if your *membership.ini* file is in a folder */var/www* and your *export_import* folder is */var/www/export_import*, you would change the lines to read:

```
define('SITE_ROOT', '/var/www');  
define('EXPORT_IMPORT_FOLDER', '/var/www/export_import');
```

If for any reason you have changed the name of the ini file from *membership.ini* you will also need to update the constant *INI_FILE*.

8 Applying branding

If you wish to brand the system for your own organisation you can do so by uploading one or more of the following images:

- images/branding/logo_top.png – a logo that will appear at the top of each page.
- images/branding/logo_left.png – a logo that will appear on the left of the navigation bar on each page.
- images/branding/logo_right.png – a logo that will appear on the right of the navigation bar on each page.

9 Configuring the system

The main configuration file is *membership.ini*. Open this file with a text editor of your choice and modify the contents of the file as described below. The file is split up in to sections, indicated with [square brackets] and each section contains a number of key-value pairs, separated by an = sign. Comments can be included in the file and start with a semicolon. If the value you enter contains non alpha-numeric characters, you should put it in quotes.

[database]

host= Enter the IP address or name of the server which holds your database. For most hosting providers this will be *localhost*, but some providers such as Tsohost have dedicated database servers, and will provide you with an IP address.

username= Enter the username you noted in section 5.

password= Enter the password you noted in section 5.

database= Enter the name of the database you noted in section 5.

charset= In most cases this will be set to *utf8*. If you want to use special characters that are not part of the UTF-8 character set this may need to be changed.

[system]

debug= This should be set to *0* on production systems. It should only be set to *1* if instructed to do so by Snowdonia IT Services for troubleshooting purposes.

is_charity= If your organisation is a charity this can be set to *1* to allow members to specify whether they would like their payments to be subject to Gift Aid. Otherwise this should be set to *0*.

email_override= If a value is specified, all emails sent by the system will be redirected to the supplied email address. This is used for testing and troubleshooting, and will usually be blank.

expired_type_id= A special group used to store details of members whose membership has expired, or whose payment has not yet been received. This will usually have the value *1*.

admin_required_additional_fields_optional= When an administrator is adding or editing a member, this controls whether required additional fields must be completed. If it is set to *1* the administrator must complete all required fields before they can add a member. If it is set to *0* only those fields needed for the system to function must be completed by the administrator. A member will always be required to complete their own required additional fields.

[user]

allow_download= Set this to *1* if you would like to allow users to download their own information in an Excel spreadsheet. Otherwise set it to *0*.

allow_remove= Set this to *1* if you would like to allow users to remove their own account and delete all their personal information held in the system. Otherwise set it to *0*.

[security]

max_login_attempts= The number of incorrect password attempts which are allowed before an administrator or member account is temporarily disabled and no more attempts are allowed for a specified time.

max_login_time= The time, in minutes, for which an administrator or member account is temporarily disabled, and no more login attempts allowed if the maximum number of login attempts is exceeded.

encryption_key= This value must be put in quotes. When you first log in to the system as an administrator you will be provided with a generated key to use here. Details are in section 11.

auto_login_shared_secret= This will usually be left blank. It is used if you would like to allow members who have already logged in to another system to be able to log in to the membership system without entering another password. If you wish to use this feature, please contact Snowdonia IT Services for details.

[session]

timeout= The number of seconds after which a logged in member or administrator will be automatically logged out. This is irrespective of when the user is active. A value of *0* means until the browser is closed.

[layout]

title_top= If this is set to *1* the site title will be shown at the top of each page, and centered. Otherwise it should be set to *0*.

title_nav= If this is set to *1* the site title will be shown in the navigation bar on each page. Otherwise it should be set to *0*.

admin_items_per_page= The number of items to display per page in the administration system. If this value is exceeded pagination is used to enable further items to be viewed.

max_pagination_size= The maximum number of pages to display in the pagination bar in the administration system if the number of items to display per page has been exceeded.

[payments]

default= If you have any types of membership where online applications are accepted, this defines the default payment method to be used. It must contain one of the following values, in quotes:

- PayPal
- Secure Trading
- Offline

enable_securetrading= If you accept payments using Secure Trading this should be set to *1* and all the securetrading options below completed. Otherwise it should be set to *0*. For

further details on setting up Secure Trading payments please see the documentation available at <https://www.securetrading.com/support/document/category/payment-pages/>.

securetrading_sitereference= Your Secure Trading site reference. This will be supplied by Secure Trading when you sign up for their service. Test site references for trialling the system usually begin with test_.

securetrading_currencycode= The currency code for payments made using Secure Trading. Usually this will be set to *GBP* if your company is based in the UK and you want to receive payments in UK Pounds.

securetrading_profile= The profile used to display your payment pages. This will usually be *default* unless you have designed your own payment pages.

securetrading_shared_password= This is a shared secret password agreed between you and Secure Trading. You should ask Secure Trading to use the following fields only when setting up the *site security*:

- Site reference
- Currency
- Amount

securetrading_notification_password= This is a shared secret password used when Secure Trading send a payment notification back to the membership system. You must configure the Secure Trading rule manager to send a URL notification on successful authorisation. Details of how to set this up are in the Secure Trading documentation. The notification must go to *securetrading_callback.php* and include the following information with a SHA-256 hash:

- Auth code
- Base amount
- Error code
- Order reference
- Transaction reference

securetrading_custom_field= When setting up your URL notification you can ask for it to be triggered only if this value is included in the parameters passed to Secure Trading when payment is made. This is useful if you use your Secure Trading account for more than one application. It is recommended to set this to *membership*.

enable_paypal= If you accept payments using PayPal this should be set to 1 and all the PayPal options below completed. Otherwise it should be set to 0.

paypal_environment= This should be set to *sandbox* for testing, and *live* for production.

paypal_api_user= Your PayPal API username. For further details on how to generate your PayPal API credentials please see <https://www.paypal.com/uk/selfhelp/article/how-do-i-request-api-signature-or-certificate-credentials-for-my-paypal-account-faq3196>.

paypal_api_password= Your PayPal API password.

paypal_api_signature= Your PayPal API signature. This should be in quotes.

paypal_currency= The currency code for payments made using PayPal. Usually this will be set to *GBP* if your company is based in the UK and you want to receive payments in UK Pounds.

paypal_payment_type= This will usually be set to *Sale* to transfer money immediately.

enable_offline= If you want to allow members to signup online and make payment offline, e.g. by cheque or cash, set this to *1*. Otherwise it should be set to *0*.

[email]

use_smtp= If you use SMTP for email you are likely to get more reliable delivery of email, but you require an SMTP server. Some hosting providers supply one of these, and if you wish to use it set this to *1* and complete the items below. Otherwise set it to *0*.

smtp_host= This is the name or IP address of the SMTP server. It should be enclosed in quotes. For Tsohost you can use '10.168.1.70' as detailed at <https://help.tsohost.com/knowledge-base/article/4412>.

smtp_port= The port number for the SMTP server. For Tsohost you can use 25.

smtp_auth= Set this to *1* if your SMTP server requires authentication and complete the values below, otherwise set it to *0*. For Tsohost this is set to *0*.

smtp_security= Specify whether to use *ssl* or *tls* when connection to the email server. For Tsohost leave this blank.

smtp_username= If SMTP authentication is being used, enter the username used to connect to the SMTP server.

smtp_password= If SMTP authentication is being used, enter the password used to connect to the SMTP server.

smtp_debug= Specify *0* for production systems, or *2* if you are having problems sending email and would like to carry out debugging.

[mailing]

mailchimp_enabled= If you would like to use MailChimp to manage your mailing list set this to *1* and complete the items below. Otherwise set it to *0*.

mailchimp_api_key= Your API key for connection to MailChimp. For details on how to generate your key see <https://kb.mailchimp.com/integrations/api-integrations/about-api-keys>.

mailchimp_endpoint= This should be set to <https://us18.api.mailchimp.com/3.0> where us18 is replaced with the characters after the dash in your API key.

10 Logging in

Log in to the system by visiting the URL `/admin/` on the domain you have used for installing the system e.g. <https://membership.snowdoniait.com/admin/>. You should see the screen shown in Figure 1.

Demo Membership System Login

Home / Admin / Login

Administrator Login

Email address

Password

[Login](#)

Forgotten your password? [Reset it here.](#)

Demonstration Membership System by Snowdonia IT Services.
Please contact us if you would like to purchase this system.
Membership System © 2018 Snowdonia IT Services

Figure 1 The administration system login screen

The initial credentials are

- Username: initial@snowdoniait.com
- Password: *test1234*

When you first log in you will be prompted to change your password. You must do this before you can continue. It is also recommended that you change the email address and name to be those of an administrator within your organisation. You will see a screen like that shown in Figure 2. Replace initial@snowdoniait.com with an administrator email address and put in the forename and surname of that administrator. Put *test1234* in the box for the *old password*. Choose a new password and put in in the *New password* and *Retype new password* boxes. Your new password must meet the following requirements:

- Be between 8 and 20 characters in length.
- Contain at least one number.
- Contain at least one upper case letter.
- Contain at least one lower case letter.

Note the new password and old password cannot be the same. Click the *Update Profile* button to save the changes.

After changing your password, you will be required to log in again. Please be aware you can only be logged in from one location at a time.

Profile

You must change your password at this time

Privacy policy agreed on [\(view\)](#) 22/05/2018 16:44:07

Email address * andy@snowdoniait.com

Forename * Andy

Surname * Harbach

Old password * Old Password

New password * New Password

Retype new password * Retype New Password

[Update Profile](#)

Figure 2 Changing the administrator password

11 Generating an encryption key

If you do not have an encryption key in the file *membership.ini* you will then be taken to a page where a random encryption key will be generated, shown in Figure 3.

Generate Encryption Key

The key generate is below. Copy and paste (or replace) the following line in to the [security] section of membership.ini

```
encryption_key="eU0sP0B9JOi0shihAVwSZQdsOPlo5XamtpAltQK7x8I="
```

Figure 3 Generating an encryption key

Copy this key to the line *encryption_key=* in the *[security]* section of the file *membership.ini*.

12 Configuring cron

A scheduled task should be set up using *cron* if you would like to automatically send email reminders to members before their membership expires, or if you want to automatically move members to the expired type.

The details of how to set up the cron job will be supplied by your hosting provider. You need to ensure the URL */auto_run/* on the domain you have used for installing the system is called once a day.

13 Upgrading the application

You may wish to put the system in to *maintenance mode* before carrying out an upgrade. See the settings section of the Administration Guide for details on how to do this.

If you are upgrading an already installed version you should copy the contents of the *src*, *vendor*, *updates* and *public_html* folders in the upgrade zip file to the server in the same locations as for 6 Installing the application.

You should use the tools provided by your hosting provider to update the database. The *scripts* folder contains SQL files for each release after version 1.6. You should run all the SQLs

that are applicable to the versions between your current version and the one you are upgrading to.

If there is a need for any manual steps, such as updating the *membership.ini* file, or deleting some existing files, this will be indicated on the page where you download the upgrade.