# New User Manager 2.5
## Automatic New Caller Validation System
## for Hermes BBS!

New User Manager takes control after a new caller has completed the initial stages of logging on to a Hermes BBS.  New User Manager asks the new caller for their name, address, city, state, and zip.  It next asks the new caller a series of up to eight (8) Yes/No questions.  (The text of these questions is totally configurable by the SysOp.)  It then asks whether the new caller is a visiting SysOp.

The responses to the questions are used by New User Manager to grant levels of access to the Hermes BBS.  For example, a visiting SysOp may be granted higher access; a caller with a 2400 baud modem or calling long distance may be given more time; a caller with a specific interest may be granted special access to a message forum.  Likewise, access can be denied and restrictions placed on users based upon their responses.

**All settings are combined during the last phase of New User Manager's operation, so, by careful planning, New User Manager can enable total and secure automation of the new caller process.**

A 'Yes' answer to Question #9 then asks the caller to provide additional information.  Once again, this is configurable by the SysOp.

New User Manager offers the SysOp the option of using the normal Hermes Validation Feedback message or a set of 1 to 5 special description lines.  By using the New User Manager description lines, the SysOp can prompt the caller for very specific information and the description lines may be easier to handle for a new caller instead of the Hermes Validation Feedback message.

**All of the information which New User Manager captures is saved.**  New User Manager offers four (4) separate formats for storing the caller information.  Information may be captured in a 'Full' report to either a special TEXT file or to the G-Files area.  If captured to the special TEXT file, each caller record is added to the end of that file.  If captured to the G-Files area, each caller has their own separate file created.  This file is listed by date, so finding out who logged on to the BBS on a particular day is very easy!

The two other report formats are 'Tabbed' and 'Mail'.  The Tabbed report saves the important information to a tab-delimited TEXT file useful for importing into a spreadsheet or database.  It contains the name, address, and computer-type.  The Mail report simply saves the caller's name, address, city, state, zip, and a blank line in between.  This can be very useful for doing special mailings!

The Hermes SysOp can choose to have the new caller read and respond to an "Agreement" message.  This can be used as a 'BBS Rules" file, a liability disclaimer, or any number of uses.  If the new caller answers "Yes", New User Manager proceeds; it they answer "No", New User Manager logs them off.

New User Manager is designed to handle much of the mundane aspects of managing a Hermes BBS while providing some additional and necessary information about your callers.  It performs these

functions automatically, efficiently, yet with a level of configurability which will allow the SysOp to customize its operation.

**The possibilities for using New User Manager are up to you!**

# Feature List

1] **Saves Caller Info.** Saves new caller information in up to four (4) report formats.

2] **Auto-Validates.** Automatically adjusts Security Level, Download Security Level, Message Forum Access, and Restrictions based upon new caller responses. **Message Forum and Restrictions settings accumulate as each question is answered. The caller is given the highest SL and DSL associated with their responses.**

3] **Grant Credits.** Optionally grant credit to new callers for Messages Posted, Number of Uploads, and Kilobytes Uploaded. This allows systems wishing to use the C and D ratio restrictions to give new callers access to the system on their first call. **Credits accumulate as each question is answered.**

4] **Tri-Level Files.** At completion of New User Manager, the new caller is displayed 1 of 3 special files, based upon the Security Level which New User Manager (and the SysOp) assigned them. This feature is useful when providing different levels of accessibility on the same BBS.

5] **"Agreement" File Display.** This option allows the Sysop to display a file which contains the BBS Rules or a similar message and asks the caller to state whether they agree or not.

6] **Forced Responses.** New User Manager offers new callers several opportunities to provide the requested information at important data-gathering points. If the caller tries to bypass this, they will be automatically logged off and Hermes resets for the next caller. If a caller is logged off for not supplying the appropriate information, the user record is now automatically deleted and made ready for the next caller.

7] **AUDIO ALERTS!!** New User Manager plays special sounds through the Macintosh's speaker at two points in its operation. A "New Caller Alert' alerts you when someone new is logging onto your BBS. A 'Log Off Alert' let's you know when New User Manager has logged someone off for not providing the proper info. Of course, the AUDIO ALERTS can be turned on/off.

8] Remote operation. New User Manager is configurable either logged on locally or by calling in form remote.

9] Automatic ANSI or TEXT display of the files.

10] Added 4 additional Y/N questions for a total of 8! All questions can be used to assign specific access to your BBS.

11] Writes directly to the Hermes BBS List! If the new caller is a visiting SysOp, the BBS info they enter in New User Manager is automatically written to your BBS List.

# Setting Up New User Manager

**Step 1** *Copy New User Manager and the folder "New User Manager Folder" (and its contents, of course) into the Externals folder and restart Hermes.*

**Step 2** *Set Up Special Files*

There are several files which you will want to edit for your BBS. These files are located in a folder named "New User Manager Files" inside the "Externals" folder. The file "Desc File" is a message which will be displayed to the new caller prompting them to enter information into the New User Manager Description lines. If you want the new caller to enter specific information, be specific in your request.

The file "Agreement" is the file which the new caller must respond "Yes" or be logged off. You can turn on/off the display of this file from within New User Manager. This file should be editted to contain the info you wish displayed before the "Do you agree?" prompt.

The file "Q9Extra" is a file which will prompt the new caller to provide one line of extra information after answering "Yes" to Question #9. Creativity and planning will allow you to put this extra feature to good use.

The "Tri-Levels" files also need to be edited (or others copied into the "New User Manager Files" folder and their names changed) to reflect what you want displayed to the new callers at the end of New User Manager. These files will be displayed based upon the Security Level you assign and are useful for messaging new callers as to BBS rules, special features which are accessible based on their access level, etc..

**NOTE: If you do not want to use the Tri-Levels feature, simply enter 0 in both settings.**

**NOTE!** All special files can have ANSI and TEXT versions. You do not need to use both, but if you want to create an ANSI version, it must have ".ansi" appended to the filename. DO NOT append ".text" to the end of the TEXT versions.. It is recommended that you use both ANSI and TEXT versions.

**Step 3** *Log on to Hermes as User #1 and select New User Manager from the Externals List.*

**Step 4** *Edit the New User Manager settings for your BBS needs*

**NOTE!** It is suggested that you take some time now to read through the setup procedure prior to doing the actual setup. Entering the appropriate settings requires planning and you will want to make decisions about the settings based upon the needs of your BBS.

Choose "<A> Edit Access Levels"

You now are presented with the Access Levels Menu.

You can set the various access items for a normal New Caller, visiting SysOp, caller who answers "Yes" to question #2 through question #9.

The Key Phrase is the words or phrase which will be included in full reports to indicate a "Yes" answer to questions.

The Security and Download Security Levels are numbers from 0 to 255.

The Message Forum access is to be entered either as an 'X' to give access to a forum, or an '-' to restrict access to a forum. **Only the characters 'X' and '-' can be used, capitalization does not matter.**

The Restrictions are entered exactly as the Message Forum access.

The credits for Messages Posted, Number of Uploads, and Kilobytes uploaded are numbers from 0 to 9999. **Credits allow you to use the C and D restrictions, yet give new callers a chance to use the BBS on the first call.**

The text of the question can be edited to anything you desire, up to a maximum of 78 characters. **The text of the New Caller and Sysop question cannot be edited.**

Choose "<B> Closing Tri-Levels File"

The new caller will be displayed 1 of 3 special "Levels" files at the end of New User Manager. You enter the Security Levels that control which file is displayed at this menu item. This works exactly like the Tri-Level Bulletins in BullRead'r. You can use the Tri-Levels to display "new user" info based upon security levels. **These files will not be displayed if you have turned on Hermes Validation Feedback.**

**Default: New User Manager Special Description Lines and the Closing File.**

Choose "<C> Type of Output File"

You now are displayed the FileType Menu. Here you have the choice of 4 separate formats for the information which New User Manager gathers. The format you choose will be used when saving information to disk. You can choose one format or a combination of two formats.

**NOTE:** Hermes creates all of the data files inside the New User Manager Files except for the GFile format. To use the GFiles report requires additional simple setup. Just create a new GFiles area named 'New User Manager'. *I recommend that you set the SL to 255 so that only you can view the contents.* All your new caller reports will be posted inside this new GFiles area.

**Default:  GFiles and Mailing Address**

Choose "<D> # of Description Lines"

You can set the number of Internal Description lines from 1 to 5. These description lines are entered by the new caller and are saved to the full report.

**Default: 5 lines.**

Choose "<E> # of Description Lines"

You can set the number of questions to be asked from 1 to 9.  The last question is always if the user is a sysop so set this one higher than the number of other questions you would like to ask.

**Default: 9 questions.**

<u>Choose "<F> Toggle Hermes Feedback"</u>

It is recommended that you use the New User Manager Special Description for full New User Manager performance!  But, if you wish to use the normal Hermes Validation Feedback message, turn it on here.

**Default:  Hermes Validation Feedback message OFF.**

Choose "<G> Toggle Agreement Display"

If you want to turn the display of the Agreement file off, choose this.

**Default: ON.**

Choose "<H> Toggle AUDIO ALERTS"

If you want to turn the AUDIO ALERT feature off, choose this.

**Default: ON.**

Choose "<I> Toggle Add BBS Info to BBS List"

If you want to add automatic addition of the users BBS info to the BBS List feature off, choose this.

**Default: ON.**

That's all there is to setting up New User Manager!  Let me know the creative ways you are using it!!

# Problems & Suggestions

The best way to reach me is at owen-christopher@yale.edu, however, support for all CT Extensions can be found at two locations.  The **primary** support location is Mulligan's Valley, the **secondary** support location is Olympus.  Any problems should be reported to me either on Mulligan's Valley (203) 772-4485 or the Hermes Support BBS (206) 643-2874. You will receive much more attention if you call Mulligan's Valley.  Mulligan's Valley also has discussion sections for all the externals, so it might be benificial to call there anyway.  You may just learn from someone else's question or suggestion.

Thanks!
Chris