

Reader Management System

Complete guide to reader registration, subscriptions, institutional access, sessions, GDPR compliance, and reader portal

Version 1.1 | Updated 2026-04-11 | Operations Teams, Customer Success Teams, QA, Admin Users

[1. Simple Feature Overview](#)

The **Reader Management System** is the central hub for managing everyone who reads content on Hyphen. It covers the complete reader lifecycle — from the moment a person signs up, through their subscription journey, all the way to account deletion if they choose to leave.

[What You Can Do](#)

Capability	What It Means
Reader Registration	Readers sign up via email/OTP, Google, or Facebook on the Reader Portal
Reader Directory	Browse, search, filter, and manage all readers from the Admin Console
Profile Management	View and edit reader profiles, including personal information and account status
Subscription Plans	Create and manage subscription tiers (Digital Only or Print+Digital) with pricing and features
Subscription Assignment	Grant complimentary subscriptions, manage upgrades, cancellations, and renewals
Gift Subscriptions	Track gifted subscriptions from purchase through activation
Institutional Subscriptions	Manage institution-wide access with seat-based licensing and user invitations
Bulk Subscriptions	Handle large subscription requests with seat allocation and email processing
Session Management	Monitor reader devices, revoke sessions, configure security settings
Notifications	Readers receive notifications for new issues, renewals, content, and comments
Email Preferences	Readers control what emails they receive — newsletters, reminders, promotions
Bookmarks & History	Readers save articles and track their reading progress
GDPR Compliance	Export reader data, anonymize accounts, and handle deletion requests
Reader Moderation	Ban/unban readers, moderate comments, manage reports
Future Readers Program	Manage student enrollments, institutes, and discount programs

How the Reader Journey Works

Reader visits Reader Portal

↓

Signs up with email/OTP, Google, or Facebook → Free account created

↓

Optionally subscribes to a plan → Becomes a Subscriber

↓

Reads content, saves bookmarks, comments on articles

↓

Admin monitors engagement, handles support, manages subscriptions

↓

Reader manages their own account, preferences, and sessions

↓

If needed: GDPR export, account deletion, or anonymization

2. Who Should Use This Feature

Role	What You'll Do
Operations Team	Monitor reader metrics, manage the reader directory, handle subscription issues, process bulk requests
Customer Success	Help readers with account problems, grant complimentary access, troubleshoot login/session issues, handle GDPR requests
QA Team	Test registration flows, verify subscription behavior, validate notification delivery, check Reader Portal pages
Admin Users	Configure subscription plans, session settings, moderation rules, and RBAC permissions
Marketing Team	View reader growth metrics, manage the Future Readers Program, track subscription conversions
Finance / Billing	Review payment history, track revenue metrics, manage refunds
Readers (self-service)	Register, manage their profile, subscriptions, bookmarks, sessions, preferences, and account deletion via the Reader Portal

3. Before You Begin

Prerequisites Checklist

Step	What to Check	Where to Check
1. Admin account	You have an Admin Console login with the appropriate permissions (see Section 5.17 for required permissions)	Ask your Admin to create your account under Settings → Admin Users
2. Subscription plans	At least one subscription plan exists and is active	Readers → Subscriptions in Admin Console
3. Payment gateway	Razorpay and/or Stripe credentials are configured if you need paid subscriptions	Settings → Payment Settings — your DevOps team sets this up
4. Email/SMTP	Email sending is configured for OTP delivery, password resets, and notifications	Settings → Email Settings — confirm SMTP is working
5. Reader Portal	The Reader Portal is deployed and accessible to readers	Visit your Reader Portal URL and confirm the login page loads
6. Session settings	Session timeout, device limits, and security settings are configured	Settings → Sessions in Admin Console
7. Moderation settings	Comment moderation rules and profanity filters are configured (if comments are enabled)	Readers → Moderation → Settings tab
8. OAuth providers	Google and/or Facebook OAuth are set up (if you want social login)	Your DevOps team configures OAuth credentials

“Important: Subscription plans must be created before you can assign subscriptions to readers. Payment gateways must be configured before readers can purchase subscriptions on their own. Email/SMTP must work before OTP login, password resets, and notifications will function.”

Dependencies Between Modules

If You Want To...	You Also Need...
Let readers sign up with OTP	Email/SMTP configured
Let readers sign up with Google/Facebook	OAuth provider credentials configured
Let readers purchase subscriptions	At least one active subscription plan + Razorpay/Stripe configured
Send renewal reminders	Email/SMTP configured + automated tasks running
Grant complimentary subscriptions	At least one active subscription plan created
Set up institutional subscriptions	Institutions module configured under Sales → Institutions
Send push notifications	VAPID keys configured (DevOps)
Process gift subscriptions	At least one plan with "Allow Gift" enabled
Print magazine delivery	Magazine schedule configured + print delivery settings on subscription plan

4. Key Terms in Simple Language

Term	What It Means
Reader	Anyone who has an account on the Reader Portal — they may be a free user or a paying subscriber
Subscriber	A reader who has an active subscription plan (paid, complimentary, gift, or institutional)
Free Reader	A registered reader without a subscription — they can access free content, bookmark articles, and comment
Tier	The access level of a reader: Free , Registered , Subscriber , Institutional , or Admin
Subscription Plan	A predefined package (e.g., "Monthly Digital" or "Annual Print+Digital") with specific pricing and features
Complimentary Subscription	A subscription granted manually by an admin at no cost to the reader — e.g., for authors, partners, or promotions
Gift Subscription	A subscription purchased by one person (the buyer) for another person (the recipient)
Institutional Subscription	A subscription purchased by an organization (university, library, company) that gives access to multiple readers (seats)
Bulk Subscription	A large subscription request (multiple seats) handled through a negotiation and fulfillment process
OTP	One-Time Password — a 6-digit code sent to the reader's email for login verification
Session	A record of a reader being logged in on a specific device or browser
Device Limit	The maximum number of devices a reader can be logged in from at the same time
Renewal	When a subscription period ends and the next billing cycle begins automatically
Churn	When a subscriber cancels or lets their subscription expire
GDPR	General Data Protection Regulation — privacy rules that give readers the right to access, export, and delete their personal data
Anonymization	Permanently removing all personal information from a reader's account (email is hashed, name/phone/profile are erased) — this cannot be undone
Data Export	Downloading all of a reader's data as a JSON file — includes profile, subscriptions, bookmarks, comments, and reading history
Ban	Blocking a reader from accessing the platform — can be temporary or permanent
Moderation	Reviewing reader comments and reports to enforce community standards
Entitlement	A specific feature or access right included with a subscription plan (e.g., unlimited access, archive access, print delivery)
Billing Period	How often a subscription is charged: monthly, quarterly, annual, or one-time
Past Due	When a subscription payment has failed but the subscription hasn't been cancelled yet
Magazine Schedule	A calendar of print magazine delivery dates for Print+Digital subscribers
Future Readers Program	A program offering discounted or free subscriptions to students through competitions or verified student discounts

[5. Step-by-Step Setup Guide](#)

[5.1 Reader Registration and Login Flows](#)

Readers create their accounts on the **Reader Portal** (not the Admin Console). There are several ways to sign up and log in.

[How a Reader Registers \(Reader Portal\)](#)

1. The reader visits the Reader Portal and clicks "**Don't have an account?**" (or navigates to `/register`).
2. They see the "**Create your account**" page with these benefits listed:
 - Save articles to your bookmarks
 - Comment on articles
 - Weekly newsletter with top picks
 - Access to free content library
3. They fill in:
 - **Full name** (optional)
 - **Email address** (required)
 - **Subscribe to our weekly newsletter** checkbox (checked by default)
 - **I agree to the Terms of Service and Privacy Policy** checkbox (required)
4. They click "**Create Account**".
5. A 6-digit OTP is sent to their email.
6. They enter the OTP on the verification screen and click "**Verify & Sign In**".
7. Their account is created and they are logged in.

Alternative — Social Sign-Up:

- The reader can click "**Sign up with Google**" or "**Sign up with Facebook**" instead.
- They must accept the Terms of Service checkbox before social sign-up buttons become active.
- A message appears: "*Please accept the terms above to use social sign-up*" if they try to click before accepting.

[How a Reader Logs In \(Reader Portal\)](#)

1. The reader visits the Reader Portal and navigates to `/login`.
2. They see the "**Welcome back**" page.
3. They enter their **email address** and click "**Send OTP**".
4. A 6-digit OTP is sent to their email.
5. They enter the code and click "**Verify & Sign In**".

6. They are logged in.

Alternative — Social Login:

- Click "Sign in with Google" or "Sign in with Facebook".

Alternative — Password Login:

- If the reader has set a password (e.g., through password reset), they can use email + password to log in.

[Forgot Password Flow](#)

1. From the login page, the reader clicks "Forgot your password?".
2. They enter their email address and click "Send Reset Link".
3. They see: *"If an account exists for [email], you'll receive a password reset link shortly."*
4. They check their email for the reset link.
5. They click the link, which takes them to the "Reset your password" page.
6. They enter a new password that meets the requirements:
 - At least 8 characters
 - Contains a letter
 - Contains a number
7. They confirm the password and click "Reset Password".
8. They see a success message and can click "Sign in" to log in with their new password.

"Tip: The reset link expires after a set period. If the reader's link has expired, they'll see an "Invalid Reset Link" message and can request a new one."

5.2 Reader Directory and Profile Management in Admin Console

The screenshot shows the 'Readers Overview' dashboard in the Hyphen Admin Console. The dashboard is divided into several sections:

- READER GROWTH:** Total Readers (32), New This Week (+0), New This Month (+5), Growth Rate (0%).
- SUBSCRIPTION HEALTH:** Active Subscribers (3), Churn Rate (0%), Trial Conversions (0), Avg Subscription Value (\$499).
- ENGAGEMENT:** Active Today (0), Avg Session (-), Articles Read (0), Comments (0).
- MODERATION SNAPSHOT:** Pending Comments (0), Flagged Items (0), Open Reports (0), Banned Users (1).

At the bottom, there are three sections: Recent Signups (test7, test6), At-Risk Subscribers (At-risk subscriber tracking coming soon), and Top Engaged Readers (Engagement tracking coming soon).

The reader directory — manage all registered readers from one place

- 1 Search bar — find readers by name, email, or subscription ID
- 2 Filter controls — filter by subscription status, plan, or registration date
- 3 Quick actions — view profile, manage subscription, or send notification

The Reader Directory is where admin users browse and manage all registered readers.

Accessing the Reader Directory

1. Log in to the Admin Console.
2. Click "Readers" in the sidebar.
3. You'll see the Readers Overview dashboard with key metrics:
 - **Reader Growth:** Total Readers, New This Week, New This Month, Growth Rate
 - **Subscription Health:** Active Subscribers, Churn Rate, Trial Conversions, Avg Subscription Value
 - **Engagement:** Active Today, Avg Session Duration, Articles Read Today, Comments Today
 - **Moderation Snapshot:** Pending Comments, Flagged Items, Open Reports, Banned Users
4. Click "Reader Directory" (or navigate to Readers → Directory).

[Browsing and Filtering Readers](#)

On the **Reader Directory** page, you'll see:

- **Stats Cards** at the top: Total Readers, Subscribers, Institutional Users, New This Month
- **Search bar** — search by name or email
- **Filter dropdowns:**
 - **Status:** All Status, Active, Inactive, Banned, Pending Verification
 - **Tier:** All Tiers, Free, Registered, Subscriber, Institutional
 - **Subscription Status:** All, Active, Cancelled, Expired, Past Due, Trial, Complimentary
- **Clear Filters** button to reset all filters

The reader list shows a table with columns:

- **Name** — the reader's display name
- **Email** — their email address
- **Tier** — their access level (Free, Registered, Subscriber, Institutional)
- **Status** — their account status (Active, Inactive, Banned, Pending Verification)
- **Joined Date** — when they registered
- **Last Login** — when they last logged in
- **Actions** — View (→), Ban, Delete

[Viewing a Reader's Profile](#)

1. In the Reader Directory, click the **View (→)** button on any reader row.
2. You'll see the **Reader Details** page with breadcrumbs: **Readers → Directory → [Reader Name]**.

The page includes:

User Summary Card (always visible at top):

- Avatar with initials
- Status badge (Active / Inactive / Banned / Pending Verification)
- Tier badge (Free / Registered / Subscriber / Institutional / Admin)
- Trusted badge (if applicable)
- **Edit Profile** button
- Quick stats: Member since, Last login, Total logins, Comments

Action Buttons (top right):

- **Refresh** — reload reader data

- **Grant Subscription** — appears if the reader has no active subscription and is not institutional
- **Reset Password** — sends a password reset email to the reader
- **Ban Reader / Unban** — depending on current status

Profile Information Card:

- Bio, Location, Website, Joined date, Last login, Total logins, Comment count

Subscription Card:

- Plan name, Status badge (Active / Past Due / Cancelled / Complimentary)
- Start date, Renewal/End date, Payment method
- Actions: **Extend subscription**, **Cancel subscription**

Institutional Subscription (if applicable):

- Institution name, Access dates, Seat count

Devices List:

- Each device shows: Device name, Last seen date, **Revoke** button

GDPR Actions:

- **Export Data** — downloads all reader data as a JSON file
- **Anonymize** — permanently removes all personal information (requires confirmation)

[Editing a Reader's Profile](#)

1. On the Reader Details page, click "**Edit Profile**" in the User Summary Card.
2. Edit the reader's **name** and **email** inline.
3. Save your changes.

"Note: You cannot change a reader's password directly. Use the "Reset Password" button to send them a reset link."

[Exporting the Reader Directory](#)

1. On the Reader Directory page, click the **Export** button (download icon) in the top right.
2. A file containing the filtered reader list will download.
3. This requires the `USERS_EXPORT` permission.

5.3 Create and Manage Subscription Plans

Create and manage subscription plans with pricing tiers, access levels, and billing intervals.

Subscription plans define what readers get when they subscribe. You must create at least one plan before readers can subscribe.

Viewing Existing Plans

1. Navigate to **Readers** → **Subscriptions** in the Admin Console sidebar.
2. You'll see the **Individual Subscriptions** page with:
 - **Key Metrics:** Active Subscribers, New This Month, Churned This Month, Monthly Revenue
 - **Revenue Metrics:** Annual Recurring Revenue, Avg Revenue Per User, Trial Conversions, Conversion Rate
 - **Subscription Plans** section showing all plans in a card grid

Each plan card shows:

- Plan name and display name
- Plan type (Digital Only / Print+Digital)
- Price (monthly and/or annual)
- Features list
- Subscriber count
- **Edit** and **Delete** buttons

- Active/Inactive toggle

[Creating a New Plan](#)

1. Click the "Add Plan" button (+ icon) in the top right.
2. A slide-out panel appears: the **Plan Editor**.
3. Fill in the following sections:

Basic Info:

Field	What to Enter
Plan Name (required)	Internal name (e.g., "monthly_digital") — not shown to readers
Display Name	What readers see (e.g., "Monthly Digital")
Description	A short description of the plan
Plan Type	Choose DIGITAL_ONLY or PRINT_DIGITAL
Currency	INR or USD
Sort Order	Number that controls display order on the pricing page

Pricing:

Field	What to Enter
Price One Time	One-time purchase price (in smallest currency unit — paise for INR)
Price Monthly	Monthly subscription price
Price Annual	Annual subscription price
Duration in Months	How long the subscription lasts

Features & Entitlements:

Field	What to Enter
Display Features	A list of benefits shown to readers (e.g., "Unlimited access to all articles"). You can highlight key features
Access Features	Toggle: Unlimited Access, Archive Access, Includes Print
Device Features	Max Devices (1–10), Offline Reading toggle

Options:

Field	What to Enter
Allow Gift	Toggle on if this plan can be purchased as a gift
Is Emphasized	Toggle on to highlight this plan on the pricing page
Archive Access	Toggle on to give access to archived content
Archive Issue Count	Number of archived issues accessible

Integration:

Field	What to Enter
Razorpay Plan ID	The corresponding plan ID from your Razorpay dashboard (needed for payment processing)

4. Click **"Save"** to create the plan.

[Editing an Existing Plan](#)

1. On the Subscriptions page, find the plan card and click **"Edit"**.
2. The Plan Editor opens with the current values pre-filled.
3. Make your changes and click **"Save"**.

[Activating or Deactivating a Plan](#)

- Use the **Active/Inactive toggle** on the plan card.
- Inactive plans are not shown on the public pricing page.
- Existing subscribers on an inactive plan are not affected.

[Previewing the Pricing Page](#)

- Click **"Preview Pricing Page"** in the top right to see how plans appear to readers on the Reader Portal.

[5.4 Assign, Upgrade, and Cancel Subscriptions](#)**[Granting a Complimentary Subscription](#)**

Use this when you want to give a reader free access — for example, for an author, partner, VIP, or promotional access.

1. Navigate to **Readers → Directory**.
2. Find the reader and click **View (→)** to open their profile.
3. Click the **"Grant Subscription"** button (visible only if the reader has no active subscription and is not institutional).
4. A modal appears: **"Grant Subscription"** with the message *"Manually assign a complimentary subscription to [Reader Name]."*
5. Fill in:

Field	What to Enter
Subscription Plan	Select a plan from the dropdown (auto-populated with active plans)
Duration	Choose: 1 Month, 3 Months, 6 Months, or 1 Year
Reason	Enter a reason (e.g., "Author complimentary access", "Partner promotion")

6. Click "Grant Subscription".
7. The reader's tier changes to **Subscriber** and their subscription status shows as **Complimentary**.

[Extending a Subscription](#)

1. Open the reader's profile in Admin Console.
2. In the **Subscription** card, click "Extend subscription".
3. Select the extension duration.
4. Confirm the extension.

[Cancelling a Subscription \(Admin Side\)](#)

1. Open the reader's profile in Admin Console.
2. In the **Subscription** card, click "Cancel subscription".
3. Confirm the cancellation.
4. The reader keeps access until the end of their current billing period.
5. After that, their tier changes back to **Free** or **Registered**.

[How a Reader Cancels Their Own Subscription \(Reader Portal\)](#)

1. The reader logs into the Reader Portal.
2. Navigates to **Account** → **Subscription** (via the sidebar).
3. Under "**Manage Subscription**", clicks "**Cancel Subscription**".
4. A confirmation dialog appears: *"Are you sure you want to cancel your subscription? You will continue to have access until the end of your current billing period on [date]."*
5. The reader clicks "**Yes, Cancel**".
6. Their subscription shows as "**Cancels on [date]**" until the period ends.
7. They can click "**Keep Subscription**" to change their mind before the period ends.

[5.5 Gift Subscriptions](#)

Gift subscriptions allow one person to purchase a subscription for another person.

[Managing Gift Subscriptions in Admin Console](#)

1. Navigate to **Readers** → **Subscriptions** → **Gifts** (or click the gifts link on the Subscriptions page).
2. You'll see the **Gift Subscriptions** page with:
 - **Search bar** — search by buyer name, recipient email, or gift ID
 - **Status filter**: All Statuses, Pending Payment, Paid, Sent, Activated, Expired

[Gift Subscription Lifecycle](#)

Status	What It Means
PENDING_PAYMENT	Gift has been created but not yet paid for
PAID	Payment received — ready to send to recipient
SENT	Gift notification/email sent to recipient
ACTIVATED	Recipient has activated the gift and has an active subscription
EXPIRED	Gift was not activated before the expiration date

[Viewing Gift Details](#)

1. Click the **View** button (eye icon) on any gift row.
2. A slide-over panel shows:
 - **Status badge** and **Gift ID**
 - **Amount** (highlighted card)
 - **Buyer** section: name and email
 - **Recipient** section: name, email, phone, address
 - **Gift Message** (if the buyer included one)
 - **Plan** details
 - **Timeline**: Created, Paid, Sent, Activated, Expires dates
 - **Linked Subscription** (if activated — shows reader details and period)
 - **Payment Reference ID**

[Changing Gift Status \(Admin Action\)](#)

1. In the gift detail panel, scroll to "Admin Actions".
2. Click the appropriate status button to move the gift to the next stage.
3. For example, if a gift is **PAID** but was not automatically sent, you can manually change it to **SENT**.

"Important: Only plans with the "Allow Gift" option enabled can be used for gift subscriptions. Check this in the Plan Editor."

5.6 Institutional Subscriptions and Reader Access

The screenshot displays the 'Sales Pipeline' interface in the Hyphen Admin Console. The sidebar on the left contains navigation options: Dashboard, Content, Editorial, Magazine, Readers, Future Readers, Marketing, Sales, Pipeline (highlighted), Institutions, Reports, Social Media, Layout & Design, Store, Analytics, and Platform & Settings. The main content area shows the 'Sales Pipeline' with a sub-header 'Manage institutional opportunities and deals'. It includes an 'Export' button, a 'Reports' button, and a '+ New Opportunity' button. A warning banner indicates '1 overdue follow-up' with a 'View All' link. Below this are four summary cards: 'Active Opportunities: 12', 'Pipeline Value: ₹3,550', 'Avg Deal Size: ₹296', and 'Converted This Month: 0'. A search bar and a dropdown menu for 'All Types' are also present. A table summarizes the pipeline: 'TOTAL PIPELINE: ₹3,55,000', 'WEIGHTED VALUE: ₹1,77,500', and 'ACTIVE OPPORTUNITIES: 12'. A status bar shows 'New: 0', 'Contacted: 0', 'Negotiating: 0', and 'Inactive: 12'. A detailed view of an opportunity for 'Delhi University' is shown on the right, including contact information for 'Sriram Jayab' and a probability bar.

Manage institutional subscriptions with seat allocation, IP-based access, and usage reporting.

Institutional subscriptions give organizations (universities, libraries, companies) access for multiple readers.

Where to Manage Institutions

- Navigate to **Sales** → **Institutions** in the Admin Console sidebar.
- The old path **Readers** → **Subscriptions** → **Institutional** redirects here.

Creating an Institutional Subscription

1. Go to **Sales** → **Institutions** and click "Add Institution".
2. Fill in the institution details:

Field	What to Enter
Name	Institution name (e.g., "Delhi University")
Type	University, Library, School, Corporate, Nonprofit, or Other
Contact Name	Primary contact person
Contact Email	Contact email address
Contact Phone	Contact phone number
Address	Institution address
GSTIN	GST registration number (for Indian institutions)
PAN Number	PAN number (for Indian institutions)
Billing Address	Billing address details
Seats	Number of reader accounts included
Plan	Select a subscription plan
Start Date	When access begins
End Date	When access expires
Total Amount	Total contract value

3. Save the institution.

[Inviting Readers to an Institution](#)

1. Open the institution's detail page.
2. Go to the **Users** tab.
3. Click **"Add User"** or **"Invite"** to add individual readers.
4. To invite multiple readers at once, click **"Send Bulk Invitations"** and enter the email addresses.
5. Each invited reader receives an email with an activation link.

[How an Invited Reader Activates Their Account](#)

1. The invited reader receives an email with an activation link.
2. They click the link and see the **"Activate Your Account"** page showing: *"You've been invited to join Hyphen through [Institution Name]."*
3. **If they don't have an existing account:**
 - They see their name and email (pre-filled from the invitation).
 - They create a password (minimum 8 characters, must contain a letter and a number).
 - They confirm the password and click **"Create Account"**.
4. **If they already have a Hyphen account:**
 - They see: *"An account already exists with this email."*
 - They click **"Link My Account"** to connect their existing account to the institutional subscription.

5. After activation, they see: *"Welcome to Hyphen! Your account has been activated. You now have full access to Hyphen through your institutional subscription."*
6. They click "Sign In to Get Started".

[Renewing an Institutional Subscription](#)

1. Open the institution's detail page.
2. Click "Renew".
3. Update the end date, seats, and amount as needed.
4. Save the renewal.

[5.7 Bulk Subscription Requests](#)

Bulk subscriptions handle large orders (multiple seats) that require negotiation and manual processing.

[Viewing Bulk Requests](#)

1. Navigate to **Readers** → **Subscriptions** → **Bulk** (or the bulk subscriptions link).
2. You'll see the **Bulk Subscription Requests** page.
3. Filter by status: Pending, Negotiating, Approved, Processing, Completed, Rejected.

[Bulk Request Lifecycle](#)

Status	What It Means
Pending	New request received — needs initial review
Negotiating	In discussion with the requester about pricing/terms
Approved	Terms agreed — ready to process
Processing	Subscriptions are being created
Completed	All subscriptions created and delivered
Rejected	Request was declined

[Processing a Bulk Request](#)

1. Click **View** on an approved request.
2. Click "Process" (only available for approved requests).
3. A processing modal appears showing:
 - Contact name and seat count
 - Plan assigned
4. In the **Recipient Emails** text area, paste the email addresses — one per line or comma-separated.
 - Tip: *"Paste emails from your Excel file. One email per line, or comma-separated."*

5. Click "Process".
6. The system shows results:
 - **Created:** number of subscriptions successfully created
 - **Skipped:** emails that already have subscriptions
 - **Errored:** any failures

[Editing a Bulk Request](#)

1. Click **Edit** on a request.
2. Update the **Status**, **Negotiated Amount** (in INR), or **Notes**.
3. Click "**Save**".

[5.8 Reader Account Pages in Reader Portal](#)

When a reader logs in to the Reader Portal and visits their account, they see a sidebar with these pages:

Page	What It Shows
Profile	Personal information, account security, and the Danger Zone (account deletion)
Subscription	Current plan details, benefits, print schedule, payment history, and management options
Bookmarks	Articles saved for later
Reading History	Recently read articles with progress tracking
Notifications	Subscription, content, and system notifications
Sessions	Active device sessions with sign-out options
Preferences	Content topics, email notifications, reading display, and data privacy

[Profile Page](#)

The reader sees their:

- **Avatar** (from linked social account or initials)
- **Display Name** — editable, max 100 characters. Help text: *"This is how your name will appear on comments and your public profile."*
- **Bio** — editable, max 500 characters with counter
- **Location** — editable (e.g., "Mumbai, India")
- **Website** — editable URL field
- **Account Security** section showing email (with Verified badge) and password status
- **Danger Zone** section with "**Delete Account**" option

[Subscription Page](#)

The reader sees:

- **Current Plan** card with status badge (Active / Past Due / Cancelled / Expired / Trialing / No subscription)
- Plan details: name, type (Individual / Institutional / Gift / Complimentary), billing period, cancellation status
- **Print Delivery Schedule** (if their plan includes print) — shows upcoming and past deliveries with status (Scheduled / Processing / Shipped / Delivered)
- **Your Benefits** — checkmark list of included features (e.g., "Unlimited access to all articles", "Full digital archive access")
- **Manage Subscription** — buttons for "Change Plan" and "Cancel Subscription"
- **Payment History** table with Date, Description, Amount, and Status (Paid / Pending / Failed)

If the reader has no subscription, they see: *"You don't have an active subscription."* with a "View Plans & Subscribe" button.

[5.9 Bookmarks, Reading History, and Preferences](#)

[Bookmarks \(Reader Portal\)](#)

- Readers save articles by clicking the bookmark icon on any article page.
- The **Bookmarks** page ([Account](#) → [Bookmarks](#)) shows all saved articles.
- Each bookmark displays: section tag, read time, article title (clickable), excerpt, author name, and thumbnail image.
- Readers can click "**Remove**" to delete a bookmark.
- If no bookmarks: *"No bookmarks yet. Save articles you want to read later by clicking the bookmark icon."* with a "**Browse articles**" link.

[Reading History \(Reader Portal\)](#)

- Reading history is tracked automatically when a reader opens an article.
- The **Reading History** page ([Account](#) → [Reading History](#)) shows articles grouped by date (Today, Yesterday, X days ago, or the date).
- Each entry shows:
 - Progress badge (e.g., "45% read" or "Completed")
 - Time spent (e.g., "5m" or "1h 30m")
 - Article title (clickable)
 - Progress bar (visual indicator of how far they've read)
 - "**Continue**" button for partially read articles

- If no history: *"No reading history yet. Start reading articles and they'll appear here."*

[Preferences \(Reader Portal\)](#)

The Preferences page ([Account](#) → [Preferences](#)) has five sections:

1. Content Preferences:

- Reader selects topics of interest from available sections and tags.
- Selected topics are shown as highlighted pills.
- Used to personalize the "For You" feed and content notifications.
- **Suggested Topics** appear if the reader has reading history — shown as dashed-border pills with a "+" icon.
- Status text shows how many topics are selected.

2. Email Notifications:

Checkbox	Description
Weekly Newsletter	"Receive our curated weekly digest of the best content."
Renewal Reminders	"Get notified before your subscription expires so you never lose access."
New Content Alerts	"Get notified when new content matching your preferred topics is published."
New Issue Published	"Get notified when a new magazine issue is published."
Comment Replies	"Get notified when someone replies to your comments."
Promotions & Events	"Receive information about special offers and literary events."

3. Push Notifications:

- **Browser Push Notifications** toggle — *"Receive instant notifications in your browser for new issues, content updates, and subscription alerts."*
- Only available if the reader's browser supports push notifications.

4. Reading Preferences:

- **Font Size:** Small, Medium, or Large
- **Theme:** Light, Dark, or Sepia

5. Data Privacy:

- **"Download My Data"** button — downloads all reader data as a JSON file named `my-hyphen-data-{DATE}.json`.
- Help text: *"Read our Privacy Policy to learn more about how we handle your data."*

After making changes, the reader clicks **"Save Preferences"**.

5.10 Sessions and Device Management

Reader-Side Session Management (Reader Portal)

1. The reader navigates to **Account** → **Sessions**.
2. They see a list of **Active Sessions** with:
 - **Device icon** (mobile, tablet, or desktop)
 - **Device name** (e.g., "Chrome on Windows")
 - **"This device"** badge on their current session
 - **IP address** and **Last active** timestamp
 - **"Sign out"** button on non-current sessions
3. To revoke a suspicious session, click **"Sign out"** on that session.
4. An info box explains: *"Each session represents a device or browser where you are signed in. If you see a session you don't recognise, sign out of it and change your password immediately."*

Admin-Side Session and Security Settings

1. Navigate to **Settings** → **Sessions** in the Admin Console.
2. Configure:

Setting	What It Does	Recommended
Inactivity Timeout	Users are logged out after this many minutes of inactivity (5–480 range)	60 minutes
Enable Session Refresh	Automatically extends session when user is active	Enable
Maximum Concurrent Devices	How many devices a reader can be logged in from simultaneously (1–10)	3 devices
Remember Me Duration	How long "Remember me" keeps the reader logged in (1–90 days)	30 days
Require Re-authentication	Asks readers to confirm their password before changing account settings or making purchases	Recommended for sensitive environments

3. Click **"Save"** to apply changes.
4. The page shows when settings were last updated and by whom.

Revoking a Reader's Session from Admin Console

1. Open the reader's profile in **Readers** → **Directory** → **[Reader]**.
2. Scroll to the **Devices** section.
3. Click **"Revoke"** next to the device session you want to end.
4. The reader will be logged out on that device.

[5.11 Notifications and Email Preferences](#)

[How Readers Receive Notifications](#)

Readers receive notifications through two channels:

1. **In-app notifications** — visible on the **Notifications** page in the Reader Portal
2. **Email notifications** — sent to their email based on their preferences
3. **Push notifications** — browser push notifications (if enabled)

[Notification Types](#)

Type	When It's Sent
welcome	When a reader creates their account
new_issue	When a new magazine issue is published
new_content	When new content matching the reader's preferred topics is published
subscription_renewal	Before a subscription renewal date
subscription_expiry	When a subscription is about to expire
comment_reply	When someone replies to the reader's comment
system_announcement	Platform-wide announcements

[Notifications Page \(Reader Portal\)](#)

1. Reader navigates to **Account** → **Notifications**.
2. They see:
 - Count of unread notifications (or "All caught up")
 - "Mark all as read" button (appears when there are unread notifications)
 - "All" / "Unread" filter toggle
 - Notification list with: type badge, title (bold if unread), message, timestamp, unread dot indicator
 - Each notification has a **checkmark** button to mark it as read
 - Notifications with an action URL are clickable
 - "Load more" button for pagination (20 per page)

[Email Unsubscribe](#)

- Every email sent to readers includes an unsubscribe link.
- Clicking the link takes them to an unsubscribe page where they can manage their email preferences.
- Readers can also manage email preferences from **Account** → **Preferences** → **Email Notifications**.

5.12 Payment and Subscription Checkout

[How a Reader Subscribes \(Reader Portal\)](#)

1. The reader visits the pricing page on the Reader Portal (linked from the subscription page or homepage).
2. They see available plans with pricing and features.
3. They select a plan and billing period (monthly/annual).
4. They are directed to the payment checkout:
 - **Razorpay** — for INR payments
 - **Stripe** — for USD/international payments
5. After successful payment, their subscription is activated immediately.
6. They can view their subscription details on **Account** → **Subscription**.

[Payment History \(Reader Portal\)](#)

- Readers can view their payment history on the **Subscription** page.
- Each entry shows: Date, Description, Amount, and Status (Paid/Succeeded, Pending, Failed).

[Payment Management \(Admin Console\)](#)

- Admin users can view payments through the admin payment management interface.
- Capabilities include viewing payment details, processing refunds, and tracking payment status across gateways.

"Dependency: Payment gateways (Razorpay and/or Stripe) must be configured before readers can purchase subscriptions. Contact your DevOps team to set up gateway credentials."

5.13 Magazine Schedule (Print+Digital)

For subscription plans that include print magazine delivery, you need to configure the delivery schedule.

[Setting Up the Magazine Schedule](#)

1. Navigate to **Readers** → **Subscriptions** → **Magazine Schedule**.
2. You'll see the schedule page with:
 - **Year filter** dropdown (current year ± range)
 - **"Add Entry"** button (+ icon)
 - Schedule table with columns: Year, Month, Label, Status, Active toggle

[Adding a Schedule Entry](#)

1. Click **"Add Entry"** (+ icon).

2. Fill in:

Field	What to Enter
Year	Select the year
Month	Select the month
Label	A descriptive label (e.g., "Spring 2026 Issue")

3. Click "Save".

[Activating/Deactivating a Schedule Entry](#)

1. Click the **Active toggle** in the schedule row.
2. A confirmation dialog appears: *"Activate/Deactivate Schedule Entry"* with the label and month/year.
3. Click "Confirm".

"Note: Print delivery schedule entries appear on the reader's Subscription page in the Reader Portal under the "Print Delivery Schedule" section."

[5.14 Renewal Reminders, Invitation Reminders, and Automated Tasks](#)

The platform sends automated notifications and reminders based on subscription events and system triggers.

[Types of Automated Notifications](#)

Notification	When It's Triggered	Who Receives It
Renewal Reminder	Before a subscription's billing period ends	Subscribers with renewal reminders enabled
Subscription Expiry Notice	When a subscription is about to expire or has expired	The affected subscriber
Invitation Reminder	When an institutional invitation has not been activated	The invited reader
Welcome Email	When a reader creates their account	The new reader
Gift Notification	When a gift subscription is purchased	The gift recipient
New Issue Notification	When a new magazine issue is published	Readers with new issue notifications enabled
New Content Alert	When content matching a reader's topics is published	Readers with content alerts enabled

[How to Check if Reminders Are Being Sent](#)

1. Check if the reader has **Renewal Reminders** enabled in their email preferences:
 - Open the reader's profile in Admin Console.
 - Check their notification preferences.
 - Or ask the reader to check **Account** → **Preferences** → **Email Notifications** → **Renewal Reminders** on the Reader Portal.

2. Verify that email/SMTP is configured and working:
 - Check **Settings** → **Email Settings** in Admin Console.
3. If notifications are not being delivered, check:
 - The reader's email preferences (they may have opted out)
 - Spam/junk folder
 - Email delivery logs
 - Whether the automated task/cron job is running (contact DevOps)

“Current Status: Automated renewal and expiry notifications are implemented. The timing and frequency of these reminders depends on the cron/scheduled task configuration managed by your DevOps team.”

5.15 Account Deletion, GDPR Export, and Anonymization

Manage reader accounts including banning, GDPR export, and account anonymization.

GDPR Data Export (Admin Console)

1. Open the reader's profile in **Readers** → **Directory** → [Reader].
2. Scroll to the **GDPR Actions** section.

3. Click "Export Data" (with download icon).
4. A JSON file downloads named `hyphen-data-export-{readerId}.json`.
5. The file includes: profile, subscriptions, bookmarks, comments, and reading history.

[GDPR Data Export \(Reader Self-Service\)](#)

1. Reader navigates to **Account** → **Preferences** on the Reader Portal.
2. Scrolls to the **Data Privacy** section.
3. Clicks "Download My Data".
4. A JSON file downloads named `my-hyphen-data-{DATE}.json`.

[Account Anonymization \(Admin Console\)](#)

This permanently removes all personal information from a reader's account. **This action cannot be undone.**

1. Open the reader's profile in **Readers** → **Directory** → **[Reader]**.
2. Scroll to the **GDPR Actions** section.
3. Click "Anonymize" (warning/error styled button).
4. A confirmation dialog appears listing what will be deleted:
 - Hash the email address
 - Remove name, phone, profile details
 - Delete OAuth linked accounts and sessions
 - Remove bookmarks and institutional access
 - Anonymize comment author information
5. Confirm the action.
6. The reader's account is anonymized. Their email becomes `anon-{hash}@deleted.hyphen.co`.
7. If the account was already anonymized, the button shows "Already Anonymized".

[Account Deletion \(Reader Self-Service via Reader Portal\)](#)

1. Reader navigates to **Account** → **Profile** on the Reader Portal.
2. Scrolls to the **Danger Zone** section.
3. Clicks "Delete Account" (red-bordered button).
4. A confirmation dialog appears: *"This action is irreversible. All your data, subscriptions, bookmarks, and reading history will be permanently removed."*
5. They must enter their **current password** to confirm their identity.
6. They must type **DELETE** in the text field to confirm.
7. Click "Permanently Delete" (button is disabled until both password and "DELETE" are entered).
8. The account is deleted, the reader is signed out, and redirected to the homepage.

[Deleting a Reader from Admin Console](#)

1. In the Reader Directory, click the **Delete** button on a reader row.
 2. A confirmation modal appears: *"This action will anonymize the reader's data. This cannot be undone."*
 3. Click **"Delete Reader"** to confirm.
 4. The reader's data is anonymized (same as the anonymization process above).
-

[5.16 Reader Moderation \(Ban, Unban, Comments\)](#)

[Banning a Reader](#)

1. Navigate to the reader's profile in **Readers → Directory → [Reader]**.
2. Click **"Ban Reader"** in the action buttons.
3. A modal appears asking for a **Ban Reason** (text input).
4. Enter the reason and click **"Ban Reader"**.
5. The reader's status changes to **Banned** and they see a ban notice on their profile.

Or from the Moderation page:

1. Navigate to **Readers → Moderation → Users** tab.
2. Find the user and click their profile.
3. Click **"Ban"** and specify ban type (temporary or permanent) and reason.

[Unbanning a Reader](#)

1. Open the banned reader's profile.
2. Click **"Unban"** in the action buttons.
3. The reader's status returns to **Active**.

[Comment Moderation](#)

1. Navigate to **Readers → Moderation**.
 2. The moderation dashboard shows stats: Pending Comments, New Reports, Approved Today, Banned Users.
 3. Use the tabs:
 - **Comments** tab — review, approve, reject, edit, or delete comments (with bulk actions)
 - **Reports** tab — review reader reports, resolve or dismiss
 - **Users** tab — view user moderation records, warnings, ban status, toggle trusted status
 - **Settings** tab — configure profanity filters, auto-moderation rules, thresholds
-

5.17 Permissions and RBAC for Admin Users

Different admin roles need different permissions to manage readers. Here are the key permissions:

Permission	What It Allows
READERS_DASHBOARD_READ	View the Readers Overview dashboard
USERS_READ	View the Reader Directory and reader profiles
USERS_UPDATE	Ban/unban readers, update reader profiles
USERS_EXPORT	Export reader directory data and GDPR exports
SUBSCRIPTIONS_READ	View subscription plans and subscriber lists
SUBSCRIPTIONS_CREATE	Grant complimentary subscriptions, process bulk requests
SUBSCRIPTIONS_UPDATE	Edit subscriptions, update bulk requests, manage gift status
SUBSCRIPTIONS_MANAGE_PLANS	Create, edit, and delete subscription plans
INSTITUTIONS_READ	View institutional subscriptions
MODERATION_READ	View the Moderation section (comments, reports, users)
MODERATION_UPDATE	Moderate comments and reports, ban/warn users
SETTINGS_READ	View session and moderation settings
SETTINGS_UPDATE	Update session settings and moderation rules
ADMIN_USERS_READ	View admin team management (Team Management link in Reader Directory)

“Tip: If you click a button or try to access a page and nothing happens or you see a blank page, check with your administrator that your role has the required permissions listed above.”

5.18 Future Readers Program

The Future Readers Program offers discounted or free subscriptions to students.

Accessing the Program

1. Navigate to **Readers** → **Future Readers** in the Admin Console sidebar.
2. You'll see the program dashboard with:
 - **Stats:** Total Enrollments, Pending Review, Approved, Active Institutes
 - **Quick Links:** Institutes, Enrollments, Campaigns & Events

Two Routes for Students

Route	How It Works
Competition Route	Students submit essays or poems. Winners receive a 100% discount (free subscription)
Discount Route	Students verify their student ID and receive a 50% discount on subscriptions

[Managing Enrollments](#)

1. Click "**Review Enrollments**" from the dashboard.
2. Review student enrollment applications.
3. Approve or reject entries.
4. Approved students receive discount coupons they can use during checkout.

[Managing Institutes](#)

1. Click "**Manage Institutes**" from the dashboard.
2. Add or manage schools, colleges, and universities participating in the program.

[Linked Campaigns](#)

- The dashboard shows campaigns and events linked to the program.
 - Each campaign shows: name, status (Draft/Active/Paused/Completed/Archived), institute count, submission count, and pending count.
-

6. How to Verify It Worked

After setting up or making changes, use these checks to verify everything is working correctly.

Reader Registration Verification

Check	How to Verify
Registration works	Visit Reader Portal → Register → Complete the flow → Confirm the reader appears in Admin Console → Reader Directory
OTP delivery	Register with a test email → Confirm OTP arrives within 1-2 minutes
Social login works	Click "Sign in with Google" → Complete OAuth flow → Confirm login succeeds
Reader appears in directory	Admin Console → Readers → Directory → Search for the new reader
Correct tier assigned	New free reader should show Tier: Free or Registered

Subscription Verification

Check	How to Verify
Plans visible to readers	Reader Portal → Pricing page → Confirm active plans appear
Complimentary grant works	Admin Console → Grant subscription → Reader Portal → Account → Subscription → Confirm plan shows as "Complimentary"
Subscription benefits work	Log in as subscriber → Try accessing a subscriber-only article → Should have full access
Payment works	Reader Portal → Select plan → Complete payment → Confirm subscription is Active
Cancellation works	Reader Portal → Account → Subscription → Cancel → Confirm "Cancels on [date]" message
Gift activation works	Send a gift → Recipient activates → Confirm their subscription shows as "Gift" type

Reader Portal Verification

Check	How to Verify
Profile page loads	Log in → Account → Profile → All fields display correctly
Bookmarks work	Bookmark an article → Account → Bookmarks → Confirm it appears → Remove → Confirm it disappears
Reading history tracks	Read an article → Account → Reading History → Confirm it appears with progress
Notifications display	Trigger a notification → Account → Notifications → Confirm it appears with unread indicator
Sessions show correctly	Log in on two devices → Account → Sessions → Confirm both sessions appear
Preferences save	Change topic selections and email preferences → Save → Refresh → Confirm selections are retained
Data download works	Account → Preferences → Download My Data → Confirm JSON file downloads
Account deletion works	Account → Profile → Danger Zone → Delete Account → Enter password → Type DELETE → Confirm signout and redirect

Admin Console Verification

Check	How to Verify
Reader directory loads	Readers → Directory → Confirm reader list displays
Filters work	Apply status/tier/subscription filters → Confirm list updates
Profile page loads	Click a reader → Confirm all sections load (summary, profile, subscription, devices, GDPR)
GDPR export works	Reader profile → GDPR Actions → Export Data → Confirm JSON downloads
Anonymize works	Reader profile → GDPR Actions → Anonymize → Confirm data is removed
Session revoke works	Reader profile → Devices → Revoke → Confirm session is removed

7. Worked Examples

7.1 Example 1: Registering a New Reader and Verifying Account Access

Scenario: A new reader wants to sign up for Hyphen and start reading articles.

Steps:

1. Reader visits the Reader Portal and clicks "Don't have an account?" on the login page.
2. Reader fills in the registration form:
 - Full name: "Priya Sharma"
 - Email: "priya.sharma@example.com"
 - Newsletter checkbox: left checked (default)
 - Terms of Service: checked
 - Clicks "Create Account"
3. Reader checks email and finds a message with a 6-digit OTP (e.g., 482915).
4. Reader enters the OTP on the verification screen and clicks "Verify & Sign In".
5. Reader is now logged in and redirected to the Reader Portal homepage.
6. Admin verifies in Admin Console:
 - Navigate to **Readers** → **Directory**
 - Search for "priya.sharma@example.com"
 - Confirm the reader appears with:
 - **Status:** Active
 - **Tier:** Free (or Registered)
 - **Joined Date:** Today's date
7. Reader tests account features:
 - Navigates to **Account** → **Profile** — sees their name and email
 - Tries to read a free article — succeeds
 - Tries to read a subscriber-only article — sees paywall/limitation
 - Bookmarks a free article — confirms it appears in **Account** → **Bookmarks**

Result: Reader "Priya Sharma" has a working free account. She can read free content, save bookmarks, and comment on articles. She cannot access subscriber-only content until she subscribes.

[7.2 Example 2: Assigning a Complimentary Subscription and Checking Reader Portal](#)

Scenario: The editorial team wants to give complimentary access to a contributing author, Rahul Mehta, who already has a free reader account.

Steps:

1. **Admin logs into Admin Console** and navigates to **Readers → Directory**.
2. **Admin searches for the reader:** Types "Rahul Mehta" or his email in the search bar.
3. **Admin opens the reader's profile:** Clicks the **View (→)** button.
4. **Admin confirms the reader has no active subscription:**
 - The Subscription card shows no active plan
 - The "**Grant Subscription**" button is visible in the action buttons
5. **Admin clicks "Grant Subscription"** and fills in:
 - **Subscription Plan:** selects "Annual Digital" from the dropdown
 - **Duration:** selects "1 Year"
 - **Reason:** types "Contributing author — complimentary access"
 - Clicks "**Grant Subscription**"
6. **Admin verifies the change:**
 - The Subscription card now shows:
 - Plan: Annual Digital
 - Status: **Complimentary** (badge)
 - Start date: today
 - End date: one year from today
 - The Tier badge changes to **Subscriber**
7. **Verification on Reader Portal (as Rahul):**
 - Rahul logs into the Reader Portal
 - Navigates to **Account → Subscription**
 - Sees: Plan name, status **ACTIVE**, subscription type **Complimentary**, and period dates
 - Sees the **Your Benefits** section with checkmarks for included features
 - Tries reading a subscriber-only article — has full access

- The **Manage Subscription** section shows options (but cancellation would be unusual for a complimentary grant)

Result: Rahul now has full subscriber access for one year at no cost. The Admin Console shows the subscription was granted with the reason documented. This can be verified end-to-end in the Reader Portal.

7.3 Example 3: Troubleshooting Why a Reader Is Not Receiving Renewal Reminders

Scenario: A subscriber, Anita Desai, contacts customer support saying she was not notified before her subscription expired. Support needs to investigate.

Steps:

1. Support agent logs into **Admin Console** and navigates to **Readers → Directory**.
2. **Search for the reader:** Types "anita.desai@example.com" in the search bar.
3. **Open the reader's profile** and check the following:
4. **Check 1 — Subscription status:**
 - Look at the Subscription card
 - Note the subscription status (Expired? Cancelled? Active?)
 - Note the current period end date — when did it expire?
 - Note the subscription type — if it's Complimentary, renewal reminders may not apply
5. **Check 2 — Reader's email preferences:**
 - The reader's notification preferences indicate what emails they've opted into
 - Ask Anita to check **Account → Preferences → Email Notifications** on the Reader Portal
 - Specifically check: is "**Renewal Reminders**" enabled?
 - If it's disabled, that's why she didn't receive a reminder — she opted out
6. **Check 3 — Email delivery:**
 - If renewal reminders were enabled, the issue may be email delivery
 - Ask Anita to check her **spam/junk folder** for emails from Hyphen
 - Check with DevOps if the email/SMTP service is working correctly
 - Check email delivery logs if available
7. **Check 4 — Automated task status:**

- Renewal reminder emails are sent by automated tasks (cron jobs)
- If the automated task is not running, no reminders are sent to anyone
- Contact your DevOps team to confirm the renewal reminder cron job is active and running on schedule

8. Resolution:

- If the reader had renewal reminders disabled: Explain to Anita and help her enable it for the future
- If email delivery failed: Investigate the delivery issue with DevOps
- If the cron job was not running: Escalate to DevOps to restart it, and consider granting Anita a short extension as goodwill
- If the subscription type doesn't trigger reminders: Explain the expected behavior

9. Follow-up:

- If appropriate, grant a short complimentary extension to Anita while she renews
- Confirm that renewal reminder settings are correct for future cycles
- Ensure Anita's new subscription (once renewed) has the correct billing period and reminder setup

Result: The support agent has a clear checklist to diagnose why renewal reminders were not received. The root cause is identified and resolved, and the reader is helped back to an active subscription.

7.4 Example 4: Revoking a Reader Session and Verifying Account Security

Scenario: A reader, Vikram Singh, contacts support saying his account may have been compromised. He's seeing articles marked as read that he didn't read, and he wants to secure his account.

Steps:

1. **Support agent logs into Admin Console and navigates to Readers → Directory.**
2. **Search for "Vikram Singh" and open his profile.**
3. **Check the Devices section:**
 - Scroll down to see all active sessions
 - Look for any unfamiliar devices or locations
 - Note the device names (e.g., "Chrome on Windows", "Safari on iPhone"), IP addresses, and last active timestamps
 - If there's a session from an unfamiliar device or IP, this may be the compromised session
4. **Revoke suspicious sessions:**

- Click **"Revoke"** next to each unfamiliar device session
- The session is immediately terminated — the person using that session is logged out

5. **Reset the reader's password:**

- Click the **"Reset Password"** button in the action buttons at the top
- A password reset email is sent to Vikram's email address
- Tell Vikram to check his email and set a new, strong password

6. **Verify from the Reader Portal (as Vikram):**

- Vikram logs in with his new password
- Navigates to **Account → Sessions**
- Confirms only his current session is listed (marked as "This device")
- The suspicious session should no longer appear

7. **Additional security steps (if needed):**

- If the compromise is severe, consider temporarily banning the account while investigating
- Check if there are any unauthorized changes to Vikram's profile (name, email, bio)
- Check if any suspicious comments were posted from his account
- Review the reading history for unusual activity

8. **Inform the reader:**

- Tell Vikram that the suspicious sessions have been revoked
- Confirm his password has been reset
- Advise him to:
 - Not reuse passwords across sites
 - Enable **"Require Re-authentication for Sensitive Actions"** if available
 - Check his sessions periodically from **Account → Sessions**

Optional — Admin adjusts security settings:

- Navigate to **Settings → Sessions**
- Consider reducing the **Inactivity Timeout** (e.g., from 60 to 30 minutes)
- Consider reducing **Maximum Concurrent Devices** (e.g., from 5 to 3)
- Enable **"Require Re-authentication for Sensitive Actions"**

Result: The compromised session is revoked, the password is reset, and Vikram's account is secured. The admin has also reviewed security settings to prevent future incidents.

7.5 Example 5: Handling a GDPR Export and Anonymization Request

Scenario: A reader, Maria Fischer, sends an email to support requesting a copy of all her personal data (GDPR Right of Access) and then asks for her account to be permanently deleted (GDPR Right to Erasure).

Steps:

Part A — Data Export:

1. Support agent logs into Admin Console and navigates to Readers → Directory.
2. Search for "maria.fischer@example.com" and open her profile.
3. Export her data:
 - Scroll to the **GDPR Actions** section
 - Click "Export Data" (with download icon)
 - A JSON file downloads: `hyphen-data-export-{readerId}.json`
 - The file contains: profile information, subscription details, bookmarks, comments, and reading history
4. Send the data to Maria:
 - Review the exported file to ensure it contains all expected data
 - Send it to Maria's email as requested (following your organization's data handling procedures)
5. Alternative — Reader self-service:
 - Maria can also download her own data from the Reader Portal
 - Navigate to Account → Preferences → Data Privacy → "Download My Data"
 - A file named `my-hyphen-data-{DATE}.json` downloads

Part B — Account Anonymization:

6. Confirm the request is legitimate:
 - Verify the request came from Maria (check the email address matches)
 - Follow your organization's GDPR request verification procedure
7. Anonymize the account:
 - On Maria's profile page, scroll to **GDPR Actions**
 - Click "Anonymize" (warning-styled button)
 - A confirmation dialog appears listing everything that will happen:

- Hash the email address
- Remove name, phone, profile details
- Delete OAuth linked accounts and sessions
- Remove bookmarks and institutional access
- Anonymize comment author information
- Read the list carefully and click **"Confirm"**

8. Verify anonymization:

- The page reloads
- The reader's email now shows as `anon-{hash}@deleted.hyphen.co`
- Name, bio, location, website, and phone are blank
- All sessions are revoked
- Bookmarks are removed
- Comments still exist but show an anonymized author
- The **"Anonymize"** button now shows **"Already Anonymized"**

9. Confirm to Maria:

- Email Maria confirming that:
 - Her data export was provided (Part A)
 - Her account has been permanently anonymized
 - She can no longer log in with her old credentials
 - Her comments remain on the platform but are no longer linked to her identity
- Note: Maria could also delete her own account from **Account** → **Profile** → **Danger Zone** → **Delete Account** by entering her password and typing **"DELETE"** in the confirmation field

Alternative — Reader self-service deletion:

- Maria can navigate to **Account** → **Profile** → **Danger Zone**
- Click **"Delete Account"**
- Read the warning: *"This action is irreversible. All your data, subscriptions, bookmarks, and reading history will be permanently removed."*
- Enter her current password for identity verification
- Type **DELETE** in the confirmation field
- Click **"Permanently Delete"**
- She is signed out and redirected to the homepage

Result: Maria's GDPR request is fully handled. Her data was exported and provided to her, and her account is permanently anonymized. All personal information has been removed while preserving anonymized comment content for editorial integrity.

8. Common Mistakes and How to Fix Them

Mistake	What Happens	How to Fix
No subscription plans created	Readers cannot subscribe — the pricing page is empty and "Grant Subscription" dropdown has no options	Navigate to Readers → Subscriptions → Click "Add Plan" → Create at least one active plan
Payment gateway not configured	Readers see plans but cannot complete checkout — payment fails or no checkout option appears	Contact DevOps to configure Razorpay/Stripe credentials in Settings → Payment Settings
Email/SMTp not working	OTP emails not delivered — readers cannot register or log in with OTP; password reset links not sent; no notification emails	Check Settings → Email Settings and contact DevOps to fix SMTP configuration
Granting subscription to a reader who already has one	The "Grant Subscription" button doesn't appear	The reader already has an active subscription. Cancel or extend the existing one instead
Trying to grant subscription to institutional reader	The "Grant Subscription" button doesn't appear	Institutional readers get access through their institution, not individual grants
Reader says they can't log in after ban	Reader is banned and cannot access the platform	If the ban was a mistake, find the reader in Admin Console → Click "Unban"
Reader's session was revoked but they're still logged in	Session tokens may be cached temporarily	The reader needs to refresh the page or close and reopen the browser. Session will expire within minutes
Anonymization was done accidentally	All personal data is permanently removed	This cannot be undone. The reader will need to create a new account. Always double-check before confirming anonymization
Gift subscription shows as EXPIRED	Recipient didn't activate the gift before expiration	Create a new gift subscription or grant a complimentary subscription directly to the reader
Reader is not receiving notifications	Notifications are not showing in the Reader Portal or email	Check the reader's email preferences (they may have opted out). Check if the notification type is enabled. Check email delivery if email notifications are expected
Plan shows 0 subscribers after creating	No readers have subscribed to the new plan yet	Wait for readers to subscribe, or grant complimentary subscriptions for testing
Bulk subscription processing shows errors	Some email addresses in the paste list had issues	Check for typos, duplicates, or emails that already have subscriptions. Review the error count for details
"Allow Gift" not enabled on a plan	Readers cannot purchase that plan as a gift	Edit the plan in Plan Editor → Toggle "Allow Gift" on → Save
Reader cannot download their data	The export button fails or downloads empty data	This could be a browser issue. Try a different browser or clear the cache. If the issue persists, export from the Admin Console instead
Filters showing no results	Applied filters are too restrictive	Click "Clear Filters" to reset and try fewer filters. Check that you're searching with the correct values

9. QA / Testing Checklist

Registration & Login

- Register a new reader with email/OTP — verify account is created
- Register with Google OAuth — verify account is created and linked
- Register with Facebook OAuth — verify account is created and linked
- Attempt registration without accepting Terms of Service — verify form is blocked
- Login with OTP — verify 6-digit code is delivered and accepted
- Login with password (if set) — verify login succeeds
- Forgot password flow — verify reset email is sent and new password works
- Reset password with expired link — verify "Invalid Reset Link" message
- Verify new reader appears in Admin Console → Reader Directory
- Verify correct tier is assigned (Free/Registered)
- Verify "Resend OTP" works after 60-second cooldown
- Verify OTP rejects invalid codes (wrong digits, expired)

Subscription Plans

- Create a Digital Only plan — verify it appears in the plan list
- Create a Print+Digital plan — verify it appears with print options
- Edit a plan's pricing — verify changes are saved
- Deactivate a plan — verify it disappears from the public pricing page
- Reactivate a plan — verify it reappears on the pricing page
- Preview pricing page — verify plans display correctly for readers
- Enable "Allow Gift" on a plan — verify gift checkout works
- Set plan features — verify features display in Reader Portal subscription page

Subscription Assignment & Management

- Grant complimentary subscription — verify reader becomes Subscriber
- Verify complimentary reader can access subscriber-only content
- Extend a subscription — verify end date updates
- Cancel a subscription (admin) — verify reader retains access until period end
- Cancel a subscription (reader self-service) — verify "Cancels on [date]" message
- Verify cancelled reader loses access after period end

- Verify subscription status badges display correctly (Active, Complimentary, Past Due, Cancelled, Expired)

Gift Subscriptions

- View gift subscriptions list — verify filtering by status works
- View gift detail — verify buyer, recipient, plan, timeline are displayed
- Change gift status (Admin action) — verify status updates
- Verify gift activation creates a subscription for the recipient

Institutional Subscriptions

- Create an institution — verify it appears in the institutions list
- Add users to an institution — verify invitation emails are sent
- Activate institutional account (new reader) — verify password creation and access
- Activate institutional account (existing reader) — verify account linking
- Verify institutional reader can access subscriber-only content
- Renew an institution — verify dates and seats update

Bulk Subscriptions

- View bulk requests — verify list and filtering work
- Edit a bulk request status — verify status updates
- Process an approved bulk request with email list — verify subscriptions are created
- Verify skipped/errored counts are reported correctly

Reader Portal — Account Pages

- Profile page loads with correct data
- Edit profile (name, bio, location, website) — verify changes save
- Subscription page shows correct plan, status, and benefits
- Subscription page shows payment history
- Bookmarks page shows saved articles
- Add and remove a bookmark — verify updates
- Reading history tracks article progress
- Reading history shows "Continue" button for partially read articles
- Notifications page shows in-app notifications
- Mark notifications as read — verify unread count updates
- Sessions page shows current and other device sessions

- Sessions shows "This device" badge on current session
- Preferences — select/deselect content topics — verify save
- Preferences — toggle email notifications — verify save
- Preferences — change font size and theme — verify save
- Preferences — download data — verify JSON file downloads

Sessions & Security

- Revoke a session from Admin Console — verify device is signed out
- Revoke a session from Reader Portal — verify device is signed out
- Configure session timeout — verify readers are logged out after timeout
- Configure device limit — verify excess sessions are handled
- Verify "Remember Me" duration works as configured
- Verify current session cannot be revoked (must use logout instead)

Notifications & Email

- Verify welcome notification is created on registration
- Verify renewal reminder is sent before subscription expiry
- Verify new issue notification is sent when an issue is published
- Verify content notification matches reader's topic preferences
- Verify comment reply notification is sent when a reply is posted
- Verify email unsubscribe link works from received emails
- Verify reader can toggle each email preference type

GDPR & Compliance

- Export reader data from Admin Console — verify JSON file includes all data
- Export reader data from Reader Portal (self-service) — verify JSON file downloads
- Anonymize a reader from Admin Console — verify all PII is removed
- Delete account from Reader Portal (self-service) — verify password is required, reader is signed out and data is removed
- Verify anonymized reader's email shows as `anon-{hash}@deleted.hyphen.co`
- Verify anonymized reader's comments still exist but with anonymized author
- Verify "Already Anonymized" state prevents re-anonymization
- Verify anonymized reader cannot log in

Moderation

- Ban a reader — verify they cannot access the platform
- Unban a reader — verify they can access the platform again
- Verify ban reason is recorded and displayed
- Review, approve, reject comments from Moderation page
- Resolve and dismiss reports from Moderation page
- Toggle trusted user status — verify effect on auto-moderation

Permissions

- Admin without `USERS_READ` cannot access Reader Directory
 - Admin without `SUBSCRIPTIONS_CREATE` cannot grant subscriptions
 - Admin without `SUBSCRIPTIONS_MANAGE_PLANS` cannot create/edit plans
 - Admin without `USERS_EXPORT` cannot export data
 - Admin without `MODERATION_READ` cannot access Moderation page
 - Admin without `SETTINGS_UPDATE` cannot change session settings
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10. Current Known Limitations

Limitation	Details	Workaround
Cron job visibility	Automated tasks (renewal reminders, expiry notices, session cleanup) are managed at the infrastructure level. There is no Admin Console UI to view or manage cron jobs.	Contact your DevOps team to verify cron jobs are running and configured correctly
No in-app subscription upgrade flow	Readers cannot directly upgrade from one plan to another within the Reader Portal. The "Change Plan" button navigates to the pricing page.	Reader must cancel their current subscription and subscribe to the new plan, or an admin can grant a new subscription
No partial refund UI	There is no self-service refund option for readers. Refund processing is handled through payment gateway admin panels.	Process refunds through the Razorpay/Stripe dashboard directly
Password login limited	The primary login flow uses OTP. Password-based login is only available if the reader has explicitly set a password through the reset flow.	Readers should use OTP or social login for the simplest experience
Gift subscription — no self-service purchase UI in Admin	Gift subscriptions are purchased by readers through the Reader Portal. Admins can view and manage gift status but cannot create gifts from the Admin Console.	To give a gift-like subscription from the admin side, use the "Grant Subscription" (complimentary) feature instead
Bulk subscription processing — no email validation	When pasting email addresses for bulk processing, the system does not preview which emails are valid before processing.	Double-check your email list for typos and duplicates before pasting. Review the created/skipped/errored counts after processing
Push notifications — browser support	Push notifications require browser support and reader opt-in. Not all browsers support web push.	Ensure email notifications are also enabled as a fallback
Magazine schedule — manual entry	Magazine schedule entries must be added manually. There is no automatic schedule generation.	Plan your print schedule in advance and add entries for the full year
No reading history clear-all option	Readers can only remove individual reading history entries, not clear all at once.	Remove entries one at a time, or delete and recreate the account
Institutional invitation expiry	Institutional invitations have an expiration period. If a reader doesn't activate before expiry, a new invitation must be sent.	Resend the invitation from the institution's user management page
Data export format	GDPR exports are in JSON format only. There is no CSV or PDF export option.	Use the JSON file directly, or convert it to the desired format using a tool like an online JSON-to-CSV converter

This guide covers the Hyphen Reader Management System as implemented on 2026-03-16. For questions or issues not covered here, contact support@hyphen.co.

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