

# Kavi<sup>®</sup> Members

## Application Summary

Kavi's member management system is a core component of the Kavi Applications suite. All applications on Kavi-hosted Web sites draw user, company and permissions data from the Kavi Members database, and leverage Kavi Members access management capabilities to control user access and generate dynamic content. Kavi Members automates membership management and communications, and provides Web-based tools for organization administrators and account holders.

Because it handles most of the user management in the system, Kavi Members configuration has a large impact on Web site structure. Its settings determine whether the site manages individuals or just companies, whether nonmembers are tracked in the database or given login privileges, how users and companies are classified, what kinds of roles and permissions are assigned to different types of users, and shapes the way that members and the extended community interact with the organization through its Web site.

Configuration varies widely between sites created for small startup organizations that have yet to adopt a membership structure and those for large, well-established organizations with complex membership structures and application processes. Informal or new organizations may set up Kavi Members without the membership feature enabled and allow account holders to enjoy the benefits of a collaborative Web site without formal memberships. More formal or established organizations may offer several tiers of memberships, granting different levels of access to the Web site.

When membership is enabled, Kavi Members' workflow-aware technology tracks memberships through the application, expiration and renewal cycles, automatically generating renewal reminders and other email notifications. Super Admins create custom Membership Types that reflect the organization's membership structure, and configure the membership application and company representative signup processes according to the organization's requirements. Membership Types may be defined for companies or individuals (or both)—and each may have its own expiration rules, fee structure and application process, including click-through agreements, moderation and billing steps (if Kavi<sup>®</sup> Billing is installed).

Some organizations give member company representatives control over company information and user rosters, while other organizations reserve these tasks for administrators. Kavi Members can be configured to manage access to protected areas and tools according to the organization's bylaws and operating procedures. Companies and users are assigned types according to the organization's classification system and membership structure and granted the appropriate degree of access when the type is assigned.

### **Integration with other Kavi applications:**

- Other applications in the Kavi application suite rely on Kavi Members' user access management capabilities and database. Kavi® Groups uses company, user and relationship data to help it manage workgroups, Kavi® Showcase uses it to populate profiles and Kavi® Registration uses it to prefill event registration forms.
- Kavi Members uses Kavi® Billing (if it is installed) to issue invoices and receipts for membership fees. If Kavi® Commerce is installed, Kavi Billing uses it to process credit card payments through secure payment gateways. When all three are installed, member signup, renewal and fee collection can be fully automated. Administrators can view outstanding invoices, record offline payments and generate receipts. Members can view their membership bills, pay dues and print receipts for their records.

### **Membership structure and application processes:**

- Each organization's membership structure is encoded in custom Membership Types, with corresponding Company Types and User Types that are assigned to classify members and confer roles and access to members-only areas. Each Membership Type can have its own duration, eligibility rules, benefits, application process and fees (if Kavi Billing is installed).
- The application process for new and renewing memberships may include billing and moderation steps, or applications may be approved automatically. Company representative signup processes may include moderation, accepted email domains enforcement or a combination of these. Application and signup processes may include a click-through agreement with the organization's terms and conditions. Organizations that handle the membership application process offline can add members to the database through Admin Tools.
- Once individual members and company representatives are added, welcome messages with login keys can be emailed so new users can set their username and password, access Members Areas of the Web site and begin to enjoy their membership benefits.
- Staff and administrators are privileged users, so they are added to the Kavi Members database by administrators rather than online signup forms for security reasons.

### **Company, user and membership data management tools:**

- Company Admins can use Company Tools to manage their company's data, designate primary contacts and view, add or deactivate users on the company roster.
- Custom Member rosters and directories can be created to fit the organization's needs by sorting according to Membership Type or other criteria. Directories display or omit member and company representative information according to the organization's privacy policy and member privacy preferences.
- Users can use Members Tools to manage their own contact information and mailing list subscriptions, change passwords, set preferences and keep their profile current.
- The Upload Data tool allows Super Admins to upload large data files to migrate legacy data, add new users or companies to the database or edit multiple records simultaneously.

**Reporting and Logging:**

- The Report Builder is used to craft custom reports based on your organization's specific needs.
- Reports are based on default Report Type, each of which provides an optimized query that returns a broad data set on the chosen subject. Report Types include User, Company, Workgroup, Individual Membership, Company Membership and Company Representative Applications.
- A set of highly flexible default reports based on each of these Report Types can be used to run any number of reports, including default and custom data fields.
- Super Admins can use the new Clone a Report tool to instantly create a copy of an existing report that can be edited as needed to create a custom report. Both default and custom reports, organized by Report Type, are available in the Reports Area.
- Extensive logging functionality includes custom activity types that can be defined for use in activity logs and user and company activity histories. Administrators can manually create activity records to add information about offline events to the system's audit trail, run reports and download data to analyze membership activity. Graphs display members and memberships by type or over time.
- The Full Activity Log supports accountability by providing a detailed record of every email generated by the Kavi Members application and every database change.

**Manage user access:**

- Each administrative position is defined through an editable default type or custom type that is assigned to whoever fulfills the position. The type is associated with roles that confer the access required to fulfill the responsibilities of that position, so that access is automatically granted when the type is assigned and revoked when the type is removed from the user. Assigning types makes it possible to search for and manage users by type, and to quickly transfer access privileges when someone new assumes these duties.
- View Types and Access tools provide an overview of access configuration to Organization Admins and Super Admins. Other tools allow administrators to view and edit a specific user's access level.
- Status switch activates or deactivates access to protected areas of the Web site. Status is set automatically when a membership is acquired or expires, and can also be set manually by administrators to instantly revoke or restore access.

**Communication:**

- Template-based email can be scheduled for fully automated email notification of events such as a company or user being added, edited, etc. The new Manage Email Schedule tool allows Super Admins to view a complete list of scheduled email and search for templates by event, text or recipient type. Both email schedules and templates can be managed and customized through this tool, and new scheduled email can be added.
- Customizable email templates make email generation efficient and standardized. A rich set of variables allows Kavi Members to personalize messages with the company or recipient name. Super Admins can edit default text to suit the organization.

- Administrators may opt to send a customized template blast to a select target group or edit a template-based message when adding or editing a company, user or membership.
- Send Simple Email can be used to compose an original message to send to specified recipients or to distribute organization announcements through the built-in Members mailing list.

**New in Kavi Members:**

Visit the Kavi Members Release Notes and Changelogs on the Kavi Community site:  
[http://community.kavi.com//khelp/changelogs/select/process?app\\_meta\\_type=KMembersApp&notes=1](http://community.kavi.com//khelp/changelogs/select/process?app_meta_type=KMembersApp&notes=1)