

## Kavi July Release Notes Overview

### Kavi Workspace Components:

- [Kavi Groups](#)
- [Kavi Members](#)
- [Kavi Mailing List Manager](#)

### Kavi Membership Components:

- [Kavi Members](#)
- [Kavi Billing](#)
- [Kavi Commerce](#)

## Kavi® Workspace

This release of Kavi Workspace sees the rollout of standardized addresses and support for multiple addresses, new ways to change user and company purposes and Super Admin tools for build-it-yourself data fields. Mailing List administrators get tools for removing subscribers in bulk and for creating dynamically populated mailing lists, plus expanded logging and activity histories.

## Kavi® Groups 4.3

### What Is Kavi Groups?

Kavi Groups is the core component of Kavi Workspace. It is the first software developed specifically to support the collaborative, team-based processes of standards organizations. Every group has its own all-inclusive Group Home area complete with mailing list, calendar, document repository, roster, balloting and everything the group needs to function efficiently as a unit. Each Kavi Groups user is given a personalized window into the organization, with everything they need to participate at their fingertips. Kavi Groups facilitates high-level organizational processes such as comment resolution,

balloting and meeting attendance while meticulously logging these activities in the background — transparently managing most of the minutiae of running an organization so that organization leaders, administrators and members can channel their time and creative energy into achieving the organization's goals.

## New in Kavi Groups 4.3

This Kavi Groups release is focused on minor enhancements and bug fixes. There are few new features in the initial release of this version.

### Roster Enhancements

#### **User Join Comments Saved and Visible on Roster**

When new users request to join a group, the join form asks for additional information about the user's qualifications relative to the group's work. This information is now saved and visible to group managers on the roster page when showing full user information.

#### **Admins Set Primary or Alternate Voting Status when Adding Members**

When organizations are configured to automatically assign voting rights based on the group role, the Add Members form will now allow admins to select the voting level for members with voting roles.

### Comment Tracker Enhancements

The document comment tracker now includes distinct fields to identify the page and line number to which the comment applies.

### Document Enhancements

The application now tracks the number of downloads for each document and displays that information on the document details page.

## Fixes in Kavi Groups 4.3

- Ballot options correctly display text containing apostrophes.

- Document notification email messages are now sent in HTML format to avoid truncation of embedded URLs.
- Users can no longer bypass manager-only folder restrictions when attaching documents to calendar events.
- Attendance tracking now correctly prevents duplicate attendance records in all cases.
- Disable all Comment Tracker settings when Comment Tracker is not installed.
- Allow users to download iCalendar files for shared events.
- Display correct date for calendar events on the Meeting Report.
- The Documents page "show\_archived" flag is now group-specific.

## **Kavi® Members 4.0**

### **About Kavi Members**

Kavi Members provides user and company management as a core component of both Kavi Workspace and Kavi Membership. Kavi Members manages your account holder database, automates and personalizes email communications, and dynamically generates up-to-date member directories and company rosters. It offers fine-grained access to tools and content within Kavi Workspace by tracking user roles and permissions.

### **New in Kavi Members**

Standardized addresses and support for multiple Address Types are featured in the 4.0 rollout. The large text block for street address has been replaced by address line 1 and address line 2 fields, with an option to enable a third to accommodate long, complex addresses. Addresses contain addressee information independent of account name for greater flexibility and accuracy.

Organizations that collect mailing or shipping address data can enable drop-down lists for Country and State/Province (for the U.S. and Canada), with text boxes to collect address information from users outside these areas. Different Address Types can be

collected for users or companies with different purposes, so that the organization could require mailing addresses for members, but make this optional for nonmembers.

## **Multiple Addresses, Standardized Address Formats**

Organizations that track company or personal addresses will welcome this expanded support for addresses. Super Admins can visit the new address configuration tools on the Super Admin menu, and administrators and users will see standardized address fields on all relevant user and company forms.

On upgrade, a 'Mailing' Company Address Type and 'Mailing' User Address Type will be added on any site that collects user or company addresses. Existing address data will be migrated into appropriate data fields and the upgrade script will convert common abbreviations of states, provinces and countries into standard ISO country codes and North American postal standards if it can do so safely. Custom address data fields will not be affected by any of these changes.

### **Multiple Addresses (Super Admins)**

- The Super Admin tool Configure Addresses is used to set global address options, then Manage Company Address Types and Manage User Address Types are used to add Address Types specifically for companies or users.
- Address Types may be required or optional, and can be restricted to specific purposes.
- Organizations can choose to gather multiple Address Types for companies or users. For example, an organization may require a mailing address and a shipping address for Member Companies, and have an optional mailing address for nonmember companies.
- Using the Upload Data tool, multiple addresses can be imported into the Kavi Members database.
- Address Types can be controlled through privacy options and selected for display in Member Directories.

### **Standardized Address Formats (All)**

- Address formats now implement standard North American postal and shipping formats, with an option to switch to free-form addresses. The multi-line street address block has been replaced by Address Line 1 and Address Line 2 fields, and Address Line 3 can be enabled in the Configure Addresses tool. Address Line 3 can be useful in handling the longer, more complex addresses. The upgrade process splits street addresses into separate lines when a newline is encountered.

- Country and State/Province/Region fields now have the option of being presented as select lists of standard place names, or free-text entry. These fields are set to text entry by default, but drop-down select lists can be enabled after upgrade for greater data normalization.
- The Integrity Checker provides information about non-standard address field data, and reports if it finds data in the Address Line 3 column in the database and Address Line 3 needs to be enabled.

### Changes in Purposes (Super Admin)

- A new Change a User's Purpose tool has been added in the Super Admin area. When changing user purposes, any user or contact types that are no longer valid with the new user purpose will be revoked. Default company contact types for the new purpose will be assigned. The Super Admin will be warned of any repercussions (e.g. changes in user access) before the change is made.
- The Change a Company's Purpose tool has been improved. It now revokes any company types that are not appropriate for the new company purpose, and adds any default company types for this purpose. If the company has users and the purpose assigned to these users is incompatible, these users will be assigned new purposes. Any user or contact types that are no longer valid with the new user purpose will be revoked, and default contact types for the new purpose are assigned.
- The Upload Data tool can be used to switch users and companies from one purpose to another, as long as the company and user purposes are compatible.

### Email Enhancements (Admins)

- On the Manage Email Schedule page, the template names are now links to manage the template.
- An 'Email Template About' column has been added to the Manage Email Templates tool (e.g. User, Company Membership, etc.) and you can search for templates based on the Email Template About value.
- Template-based email blast tools offer finer control over recipients, so that the administrator can select a single user, or cherry pick from among multiple users. Or use the Select All option, then click the checkboxes for any users who shouldn't get the email.
- Added a quick link to 'Send Password Requested Email' on the Manage a User page.

## Field Manager (Super Admins)

- Company, User and Membership fields that are specific to your organization can now be managed in the Super Admin area. New tools have been added in the Super Admin Area to Add, Edit and Delete these additional data fields.
- Fields can be created, edited, removed and tested, and Super Admins can preview how various forms will look with these fields.

## User and Company Administrator Features

- A Primary Contact (or other company administrator) now sees a link to Manage My Company on the User Tools page in the Members area. When visiting the company roster (kmembers/person/roster/) on a site where company administrators are allowed to manage their company's roster, a link to the Manage Roster tool (/company/roster) is displayed. (Company Admins)
- A new ultra-simple, intuitive Reset Password form has replaced the old Get Login Link form. The Reset Password form is displayed when a user fails to login successfully. (Users)
- On the Manage a Roster page, the display has been improved for better readability. (All)
- Change Status link on Rosters has been changed to Activate/Deactivate. (Admins)

## Other

- Members Mailing Lists have been moved from the Kavi Members Super Admin Menu to Kavi Mailing List Manager Admin Menu, where they appear under the name Dynamic Members Mailing Lists.
- Edit Admin Info link on Manage a User page provides shortcut to Admin Info fields.
- An internal Activity History API has been added for use by Kavi applications.
- Fixed bug where site updates reset the Last Modified date.
- Fixed bug where individuals weren't always properly inheriting their company's ANSI interest category.

# Kavi® Mailing List Manager (KMLM) 4.0

## About Kavi Mailing List Manager

Kavi Mailing List Manager (KMLM) helps you add, monitor, troubleshoot and maintain mailing lists and email aliases. A variety of List Types are supported, so your organization can host discussion lists or send newsletters to members and public subscribers. KMLM tools make it possible to interact with ezmlm-powered mailing lists through Web-based interfaces, with fully threaded message archives for subscribers and easy access to moderation requests and subscriber lists for administrators, including special subscriber lists used to deny or allow posting privileges. Lists can be as private or open as required.

KMLM also provides email troubleshooting tools for viewing mail transfer agent status, mail delivery logs, and a bounce report that can be automatically sent to administrators by email.

## New in KMLM

There are several small enhancements in the 4.0 release of KMLM. Logging and activity histories are now provided for aliases as well as mailing lists, and the kinds of information captured for mailing lists has been expanded. A new bulk unsubscribe tool is available for mailing list administrators.

Dynamic Members Mailing Lists, formerly available only in the Kavi Members Super Admin Menu, have been moved to KMLM so any administrator can create an announcements list where subscribers are added dynamically according to specified selection criteria whenever a message is posted.

## Expanded Logging and Activity Histories (Admins)

- The Full Logs now capture any changes made to aliases, including when a subscriber is added to the alias, or removed.
- KMLM 4.0 provides an Activity History for each mailing list, linked from Mailing List Home.
- Moderation of a list message through KMLM Admin tools is recorded and can be viewed in the Mailing List Activity History, including the name of the moderator.

- Administrators can now add Activity Notes through the Add, Edit and Delete Alias tools.
- An Activity History report has been added for aliases. It is linked off the Manage Aliases page.

### **Bulk Unsubscribe (Admins)**

Administrators use the new Bulk Remove Subscribers tool to unsubscribe multiple email addresses from a mailing list as a batch operation. Just enter email addresses in a large text field or upload a file with all the addresses you want to remove. This action removes the subscriber from all the Subscriber Lists for this mailing list, including the Regular, Digest, Moderator, Allow and Deny lists.

### **Improved Email Address Searching (Admins)**

On the Manage Aliases page, searching for an email address will now find more matches. It is now possible to search on the domain portion of an email address, not just the username portion.

### **Other**

- The Dynamic Members Mailing Lists tools have been renamed and moved to the KMLM Admin menu, so all Mailing List Admins and Organization Admins can create query-populated mailing lists. (Admins)
- In the Edit Cross-Posters tool, the name of each available list is a link to that Mailing List Home (for KMLM lists), or "Full List Name (listname)" for Kavi Groups Lists. (All)
- The Examine Mail Headers tool is more robust, with better support for malformed or incomplete mail headers. (Admins)
- The HTML in the description and policy usage sections is no longer rendered on the Available Lists page. (All)

# Kavi® Membership

Release notes for the Kavi Members 4.0, Kavi Billing 4.0 and Kavi Commerce 4.0 components of Kavi Membership. The Kavi Billing component has taken a couple of strides forward with support for multiple transactions for a single bill, overdue bill tracking and the addition of the Kavi Report Builder and Email Template Blast tools. Other components offer small but useful refinements.

## Kavi Members® 4.0

### About Kavi Members

In Kavi Membership, the Kavi Members application facilitates membership signup and renewal processes, tracks membership histories and reports on membership data. If Kavi Billing and Kavi Commerce are installed, Kavi Members can send out invoices for renewing memberships.

### New in Kavi Members

- An Email step has been added to the Add, Edit, Renew and Replace Company and Individual Membership pages to allow administrators to view and manage scheduled email triggered by the action.
- A billing address is added automatically by Kavi Billing for organizations with Kavi Membership with billing. This is not an Address Type, but its configuration is dependent on the settings in the Configure Addresses tool.
- On the Edit a Membership form, the membership duration is now displayed.
- Address integration with Kavi Billing is supported. The address component of Billing Information is managed in Kavi Members, so that the contact name and address are viewed and updated along with other account holder contact information.
- Super Admins can now manage Company, User and Membership fields that are specific to your site through new tools in the Super Admin area.

- The display of the Contacts section on Manage Membership Application pages has been improved to display contact information on separate lines for better readability. Also, Primary Contacts are now always displayed first.

## Kavi® Billing 4.0

### About Kavi Billing

Kavi Billing is the online billing component of Kavi Membership, providing invoicing and receipts for membership fees. Invoices displaying your logo and Purchase Order Number can be viewed online, downloaded as ready-to-print PDFs, or sent via scheduled email notifications or batch email. Bills are automatically issued for membership fees when membership applications are submitted or membership renewal is initiated. Kavi Billing integrates with Kavi Commerce's PayPal gateway interface so your members can pay bills online with a credit card. Member billing and account history is logged and easily accessible through activity histories and the Kavi Report Builder.

### New in Kavi Billing

In the 4.0 release, Kavi Billing fully leverages KOrg framework elements that have proven so popular in other applications, including the Email Template Blast and Report Builder features. Partial payment capabilities have been added at customer request. Invoicing has evolved dramatically with new batch processing and PDF-generation functionality that includes the ability to bulk-print invoices and bulk-print receipts.

The Purchase Order ID can now be added to bills and passed to the PayPal payment gateway through the description field for consistent tracking of transactions between Kavi Membership, PayPal and your organization's accounting system. Payment reports can include the Kavi Commerce Transaction ID, so administrators can track payments and line them up with the PayPal gateway transactions.

Tracking of overdue bills is a new refinement in Kavi Billing. There is now an overdue event trigger for Scheduled Email, overdue accounts can be selected when sending Email Template Blasts, and there is a default Overdue Account Report in the Report Builder.

## **New Multiple Transactions Feature (Admins)**

- New multiple transaction feature allows administrators to handle partial payments and refunds. For example, if a company has a membership bill for \$1000 but sends a partial payment of \$500, an administrator can record this \$500 payment. After an administrator records the payment, the company can pay the balance using any of the normal payment methods.
- If a member's credit card transaction fails, the member can try a different card, with no administrator intervention needed.
- All payments, including pending and failed, show in the manage bill pages and are available in reports.

## **Print-Ready Invoices and Receipts, Batch or Single (Admins)**

- Kavi Billing now outputs high-quality invoices and receipts in Adobe® Portable Document Format (PDF). PDF documents look the same whether viewed on a computer or printed out.
- The Manage Printable Templates tool in the Kavi Billing Super Admin area is used to configure your organization's templates. Add your logo, billing from address and page size; then set options to independently configure your invoice template and receipt template.
- Billing admins can use the Print Invoices or Print Receipts tool to generate a batch of hard-copy invoices or receipts. Just set selection criteria and you'll be presented with a list of bills matching your criteria. Select all with a single click, or select just the ones you want at this time. Another click generates a downloadable PDF with one invoice or receipt per page, plus the address information in comma-separated values (CSV) format for compatibility with your label-making software.

## **Historically Accurate Records (Admins)**

- Billing account information, including the contact name, is now recorded at the time that a bill or payment is generated. The billing account history will show the correct data for any transaction, even if the billing account information has changed since this transaction.
- When billing account information changes, only the billing account information on outstanding bills is updated.
- Billing account information appears on invoices and receipts, and is available to administrators in the activity history tools.

## **Simplified Billing Account Information (Admins)**

- Companies and users with Billing Accounts can now specify Billing Contact information, including email and address. This information is explicitly controlled and independent of the information in the Primary Contact's or Billing Contact's personal account.
- The recipient for billing notices need not be a member of the organization — any designated Billing Contact can receive invoices and make payments without logging in.
- Billing account information is managed through Kavi Members Add a User and Edit a User tools, where a new section called 'Billing Information' is displayed.
- Kavi Support will enable a pair of options for organizations with legacy billing account contact information who would like a phased migration to the new format. These options allow the administrator to select an existing billing account contact or add new account contact information when managing an account. (Kavians, Admins)

## **Report Builder (Report Admins)**

- The Report Builder tool has been added to the Kavi Billing application, allowing admins to create their own reports about Billing Accounts, Bills or Payments.
- Five default reports are included: Accounts, Account Balances, All Bills, Overdue Bills, Payments.
- Overdue bill data can include the amount of time that the bill is overdue (e.g., 30 days, 60 days, etc.)
- The PayPal Transaction ID from Kavi Commerce is available in reports, so your organization can line up these transactions with bills, payments and refunds in Kavi Billing and in your accounting system.

## **Email Scheduler and Send Template Blast Tools (Admins)**

- Kavi Billing now has its own version of the Send Template Blast tool to make it easy for Billing Admins to email a batch of bills. Set the search criteria, click to select all or select just the ones you want to send out at this time, and send out a batch of email messages based on any available email template.
- Variables in the email template are replaced with actual values from the database so the content and links in each email message are personalized.

- An Overdue event has been added to the Email Scheduler, so you can add a scheduled email based on this event to send overdue notices when bills become overdue.

## Other (Admins)

- Extending the due date on an overdue bill removes the overdue flag.
- When refunds are issued, Admins may discount the bill total or mark the remainder as due, so that the bill total amount and the payment amounts match on paid bills.
- Unused Bill States have been removed. New Bill States are Unpaid, Paid and Canceled.
- An Internal API has been developed to enable other Kavi-built applications to interact with Kavi Billing.
- The In Dispute flag is no longer available due to an indisputable apathy surrounding its existence.

## Kavi® Commerce 4.0

### About Kavi Commerce

Kavi Commerce provides online handling of credit card transactions for Kavi Membership so membership fees can be paid online through a PayPal credit card gateway. The secure Web interface protects confidential data while credit card payments are tracked via gateway transactional messages and order IDs. Behind the scenes, Kavi Commerce is driven by transactions originating in Kavi Billing, and reports results back to Kavi Billing while providing a seamless user experience.

### New in Kavi Commerce

Kavi Commerce now uses the PayPal gateway exclusively — the manual, offline mode is available only for testing. 4.0 also offers significant improvements in ecommerce transaction history.

- PayPal acquired Verisign, so the name of the main gateway changed. The unused Echo gateway has been removed. (All)
- Off-line mode is available only in test mode. This avoids potential security issues involved in the offline upload and download of credit card numbers, even when the credit card information is encrypted. (Admins)
- Ecommerce transactions are now retained indefinitely instead of being purged. (Admins)
- The Order ID gets passed through the PayPal gateway in the description field. This field isn't searchable in PayPal, but the Order ID does provide an extra piece of data that can be used when connecting up transactions, bills and payments.