

UCanUse

Membership Services Suite



Golko Consulting

Overview of the UCanUse Membership Services Suite

The UCanUse Membership Services Suite is a powerful suite of DotNetNuke modules that allow you to design and administer any type of membership or subscription based services to individuals and groups. Memberships can be offered that are fee based or free. There are over 50 different parameters that can be set up for any type of membership or subscription you want to offer. Payments are handled through Authorize.NET or PayPal and we also do custom work if you want to use a different payment provider.

A large number of tools are provided to help you effectively administer a robust membership based web portal. Additional tools are provided for the members themselves. We suggest you set up Site Administrator only pages with modules dedicated to the Site Administrator, Staff Administrator/Group Administrator only pages for modules they will use, a Personal Home Page for modules dedicated for individual group and membership members, and various other pages as noted below. You can then have main menu headings for Site Administrator Tasks and for Staff/Group Administrator Tasks.

The following list shows all of the tools included in the UCanUse Membership Services Suite.

Component or Module	Description		
	Suggested Security Role Access	Suggested Install Menu or Page	Included in Version
Global Application Settings	Set properties for the entire application.		
	Site Administrator	Site Administrator Tasks	All Versions
Staff Administrator/Group Administrator Association	Associate Group Administrators with a Staff Administrator.		
	Site Administrator Staff Administrator	Site Administrator Tasks	All Versions
Membership Type Definition	Define a type of Membership with over 50 properties.		
	Site Administrator or Delegate	Site Administrator Tasks	All Versions
Membership Type Wizard	Wizard-style interface to define a type of Membership.		
	Site Administrator or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions
Discounts and Promotions	Set up different types of promotions and discounts. Modules detailed below.		
	Site Administrator or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions

Manage Membership Discounts	Set up discounts based on the Membership Type and the number of members being enrolled at the same time or the accumulative total number of members.		
	Site Administrator or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions
Manage Promotion Types	Define types of Promotions.		
	Site Administrator Or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions
Manage Individual Promotions	Set up discounts for specific people enrolling in chosen Membership Types.		
	Site Administrator or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions
Manage Activity Promotions	Set up different types of Promotions by Membership Type.		
	Site Administrator or Delegate	Site Administrator Tasks or Staff/Group Administrator Tasks	All Versions
Manage My Groups Wizard	Manage groups and group members. When using this module, Site Administrators have access to all groups and group members, Group Administrators have access to only their groups and group members, and Staff Administrators have access to all the Group Administrators' groups and group members in their purview.		
	Site Administrator Staff Administrator Group Administrator	Site Administrator Tasks and Staff/Group Administrator Tasks	All Versions
Manage My Memberships Wizard	Manage memberships (activities, subscriptions, etc.) and membership members. When using this module, Site Administrators have access to all groups and group members, Group Administrators have access to only their groups and group members, and Staff Administrators have access to all the Group Administrators' groups and group members in their purview.		
	Site Administrator Staff Administrator Group Administrator	Site Administrator Tasks and Staff/Group Administrator Tasks	All Versions
My Memberships	Provides a list of the memberships the current user is enrolled in. Can be placed on a Personal Home Page or anywhere on the site.		

	Registered User	Personal Home Page	All Versions
My Groups	Provides a list of the groups the current user is enrolled in. Can be placed on a Personal Home Page or anywhere on the site.		
	Registered User	Personal Home Page	All Versions
Memberships Query	Provides the Site Administrator, or members of any delegated Security Roles, with a query form. Results can be exported to Microsoft Word or Excel. Membership records can be queried by any criteria; there are over 75 fields that can be used for the query. Any fields can be exported.		
	Site Administrator	Site Administrator Tasks	All Versions
Memberships Ad-Hoc Query	Provides the Site Administrator, or members of any delegated Security Roles, with an ad-hoc query form. Results can be exported to Microsoft Word or Excel. Membership records can be queried by any criteria; there are over 75 fields that can be used for the query. Any fields can be exported. The difference between this query and the Memberships Query is that direct SQL statements can be written with this one.		
	Site Administrator	Site Administrator Tasks	All Versions
Membership Items Catalog	Provides a simple catalog entry form; downloadable or shippable items can be packaged with specific Membership Types.		
	Site Administrator Or Delegate	Personal Home Page	All Versions
Membership Type Catalog Items Association	Associate catalog items with specific Membership Types.		
	Registered User	Site Administrator Tasks	All Versions
Charities	Entry for to enter Charities and organizations for which donations can be gathered and distributed to. There is an option on the Membership Enrollment forms to allow people enrolling in memberships to also contribute to charities.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Charity Details	This is a display form for the details of charities or organizations entered in the Charities module. A single charity is displayed when linked to from a charities selection or view list.		

	All Users, Unauthorized Users	Anywhere with all or registered user access	All Versions
List of Charities	Provides a listing of charities and organizations for which donations can be solicited.		
	Site Administrator Or Delegate	Anywhere with all or registered user access	All Versions
Membership Search	Provides basic and advanced search for end users. Settings allow searches for Membership Types, Memberships and Membership Groups and Content Items depending on the system components installed. Membership Categories, Content Categories and Key Words can be used and there are settings on what will be searched. An Advanced Search for locations of organizations is also provided and if the UCanUse Content Management System is installed, content items can be displayed, viewed and listened to right from the included media list.		
	All Users, Unauthorized Users	Anywhere with all or registered user access	All Versions
Membership Categories	Set up a list of Categories that can be associated with Membership Types. Membership Categories can be used to search for specific Membership Types and Memberships.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Membership Categories Association	Associate Membership Categories with specific Membership Types.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Membership Enrollment Form	Provides an interface to enroll people in memberships (activities, subscriptions, etc.) and to process payments if payments are required. This form operates in several different modes depending on the need. Group Administrator mode is used by Group Administrators to enroll their groups in selected types of memberships. Group Mode is used for group members to enroll in activities their Group has been enrolled in. Individual Mode is used by individual (non-Group) members to enroll in selected Memberships. There are many different options to set up the form in different ways depending on the need.		
	All Users, Unauthorized Users	Anywhere	All Versions
2 Column	A 2 (two) column version of the Membership Enrollment form.		

	All Users, Unauthorized Users	Anywhere	All Versions
5 Column	A 5 (Five) column version of the Membership Enrollment form. The middle column is a spacer column so the form appears with two sets of column pairs.		
	All Users, Unauthorized Users	Anywhere	All Versions
Enter Membership Code	When a Group Administrator enrolls a Group in a membership type, the Group Administrator can provide a special, unique Pass Code which can then be distributed to the people invited to enroll in that Group membership. This form provides the interface for people to enter the Pass Code. If the Pass Code passes validation, the individual is redirected to the actual enrollment form, with the correct membership already loaded to complete the transaction or enrollment.		
	All Users, Unauthorized Users	Anywhere	All Versions
UCanUse Payment Services	Provides the back end to interface with Authorize.NET and PayPal. Other payment providers will be added in the future as the need arises.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage Credit Card Types	Enter the types of Credit Cards that will be accepted on the site.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage Payment Types	Enter the types of payments that will be accepted on the site; for example, credit cards, PayPal, invoice, etc. Also use this form to enter the refund policy, if any, for each payment type.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage Payment Processors	Enter and manage specific Payment Provider information for Authorize.NET and PayPal. Other payment providers will be added in the future as needed.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions

Manage Payment Instrument Types	List the types of payment instruments that will be accepted.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage User Payment Instruments	Provides a selection list which individual can use to select their payment instrument when enrolling in a membership		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage User Payment Records	A list and details form to view and edit all user payment records. Whenever someone enrolls in a membership or makes a payment, a User Payment record is written for accounting and auditing purposes.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage User Addresses	This provides an interface where the user can manage multiple addresses. If the Site Administrator or delegate allows it, users can provide different shipping addresses when enrolling in memberships that include shippable items.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
Manage User Credits and Debits	If credits and debits are allowed when people unsubscribe or quit a membership, this module allows the Site Administrator or delegate to manage individual credits and debits for all users.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
PayPal IPN	Used to return information from a PayPal transaction to the user.		
	All Users, Unauthorized Users	Hidden	All Versions
UCanUse Templates	Email header and footer templates for different purposes, with html layout including graphics, can be entered and managed using this module. The enrollment form and various other modules can be set to use these headers and footers.		
	Site Administrator Or Delegate	Site Administrator Tasks	All Versions
UCanUse Redirect	Provides an advanced redirect mechanism based on individual user, on a user's security role(s) and other criteria. Can be used throughout		

Module	the site.		
	All Users, Unauthorized Users	Anywhere needed	Professional
UCanUse Item Registration Module	List specific items and associate Pass Codes with them. Used in conjunction with the UCanUse User Attributes and UCanUse User Pass Codes or the UCanUse User Passwords module, this module allows the Site Administrator to provide user registration of specific items such as those included with membership enrollments. This module can also be used to control which Pass Codes can be used in the registration form for people to enroll as Staff or Group Administrators.		
	All Users, Unauthorized Users	Site Administrator Tasks	Professional
UCanUse Help System	Provides context-aware help that can be dismissed by the user. Since it can be dismissed by the user, screen real estate can be saved when providing help that might only be used for a short period, such as instructions on how to use a module or about a certain page. Multi-lingual help can be provided using this module.		
	Site Administrator Or Delegate	Everywhere needed	Professional
UCanUse User Pass Codes Module	Used to generate Pass Codes for use in other areas and with other 3 rd party modules.		
	Site Administrator Or Delegate	Anywhere	Professional
Change Password	Provides a quick password-change module that can be placed anywhere on the site.		
	Registered Users	Anywhere with Registered User access	Professional
UCanUse User Passwords Module	An advanced password generator. Passwords or Pass Codes can be generated using a specific form-template, for example xxx-xx-xxxx.		
	Site Administrator Or Delegate	Site Administrator Tasks	Professional
UCanUse User Login Module	Provides advanced log in capabilities including the ability to log in by email and password. Also provides user import from MS Excel, MS Access, CSV or other SQL data sources, even those external to the DotNetNuke database. Also provides silent registration ability. Users logging in can also be validated against an external data source before		

	they can gain access.		
	All Users, Unauthorized Users	Anywhere	Professional
UCanUse User Attributes Registration Module	Advanced registration form that allows custom fields and automatic Security Role Assignments and redirects based on user input. This module is IMC enabled which means it can interact with other modules on the web site.		
	All Users, Unauthorized Users	Anywhere	Professional
UCanUse Pending Actions Module	Several different modules in the system use Pending Actions to list actions the Site Administrator has to take action on such as Pass Code requests and missed payments by membership members.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional
Membership Toolbox	Provides a dynamically generated list of modules on a page generated by the UCanUse Delegated Administration Suite's Framework Generator. Modules generated can be associated with icons that will be displayed. Items can be set to open on the same page the Toolbox is on, in a new window, or a redirect to a different page can be set.		
	All Users, Unauthorized Users	Anywhere	Professional with Delegated Administration
Item Association	Used internally, this module lists folders that have been written, pages and modules that have been generated by the Framework Generator, along with access information. The Membership Toolbox and other items use this information to access generated folders and tools.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional with Delegated Administration
UCanUse User Switcher	Different user accounts can be listed in this module which provides an automatic login using the selected user account. Used for testing the site under different security roles without having to manually log out and log back in.		
	Site Administrator or Delegate	Everywhere Needed	Professional
CATALook Membership Type Association	CATALook, a third party store front, can be used as the shopping cart for memberships. This module associates specific Membership Types with specific CATALook catalog items so the UCanUse Membership Services Suite can identify which memberships have		

	been enrolled in by a specific user.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional
Write User Information to Special Table	It is possible to write an ancillary record when users enroll in a membership. This link record includes basic user information and the type of membership being enrolled in along with the specific membership number. The resulting table record can be used by reporting services or third party modules for whatever purpose necessary.		
	Site Administrator or Delegate	Site Administrator Tasks	All Versions
Membership Members	Provides a list of members enrolled in a specific Membership. Can be included on a generated Membership related page and can also be used anywhere by setting the Membership ID in the module settings.		
	All Users, Unauthorized Users	Anywhere needed	All Versions
Group Membership Members	Provides a list of members enrolled in a specific group. Can be used on a generated Group page or on any page if the settings are set to the specific Group ID.		
	Registered Users	Anywhere needed	Professional with Delegated Administration
Membership Pages	Lists the pages that have been generated by the Framework Generator and associated with a specific Membership Type, Membership, Group or Individual.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional with Delegated Administration
UCanUse User Attributes IMC Add Group	Used with the UCanUse User Attributes module, this is an IMC enabled module that communicates with the registration form. It is used to automatically generate a Group, and optionally a Group Framework, for the person registering, and to enroll that person in that new Group. It can be set to validate Pass Codes the user enters in the registration form.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional
Admin Control Panel	Provides a quick view of the Content Items that need to be approved, by media type, to the Group Administrator. Can be used either in a Group context or in Membership context. This module also shows		

	the Organization the Group Administrator is associated with and displays the Organization image if one was uploaded.		
	Staff Administrator, Group Administrator	Staff/Group Administrator Tasks	Professional with Delegated Administration
Organizations	Entry form and searchable list of Organizations. Settings determine whether only the Site Administrator can add and edit organization records. Users can associate themselves with specific organizations using this form and a list of their associated organizations is displayed when they access the form.		
	All Users, Unauthorized Users	Anywhere needed	Professional
Organization Info Panel	Displays the image, name and location of the organization a Group Administrator is associated with. Can be used on pages generated for a Group or Membership.		
	Site Administrator or Delegate	Anywhere needed	Professional
Membership Type Memberships List	Lists all the memberships associated with a specific Membership Type.		
	All Users, Unauthorized Users	Anywhere needed	Professional

Optional UCanUse Delegated Administration Suite

The UCanUse Delegated Administration Suite adds framework generation capabilities to the UCanUse Membership Services Suite. A 'framework' is everything needed for a group or a membership and includes the automatic creation of folders, security role groups, security roles, forums, chat rooms, and all necessary pages pre-populated with modules and content.

Using the UCanUse Delegated Administration Suite in conjunction with the UCanUse Membership Services Suite, you can set up master pages so that when a new Group is created, all the associated infrastructure and pages are generated and the Staff or Group Administrator lands right on the generated Group Home Page. When a Staff or Group Administrator enrolls a group in a Membership, all the necessary infrastructure is generated for that specific membership.

It can take a minute to two minutes to generate all that infrastructure for a group or membership, depending on how many pages and modules are used for example, because DotNetNuke has to not only generate all the infrastructure but it has to rebuild its indexes and caching. If you want to save time, you can pre-generate hundreds or even thousands of frameworks in advance and when people sign up or enroll, an existing unused framework is assigned to them. This reduces the time necessary to seconds as opposed to a minute or two.

The following modules are included in the UCanUse Delegated Administration Suite.

Component or Module	Description		
	Suggested Security Role Access	Suggested Install Menu or Page	Included in Version
Delegated Administration Settings	Set properties for the entire application.		
	Site Administrator	Site Administrator Tasks	Professional with Delegated Administration
Manage Item Information and Parameters	List specific information about UCanUse and 3 rd party modules being used throughout the system. List the parameters each module uses so the system can send the proper data to each module.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional with Delegated Administration
Manage Module Templates	Module Templates are definitions of modules and are used by the Framework Generator when adding modules to newly generated pages.		
	Site Administrator or Delegate	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Manage Page Templates	Page Templates are definitions of pages and are used by the Framework Generator.		
	Site Administrator or Delegate	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Page Template / Module Template Association	Associate Module Templates with Page Templates.		
	Site Administrator or Delegate	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Manage Page Template Groups	Define Page Template Groups.		
	Site Administrator or Delegate	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Page Template / Page Template Group Association	Group Page Templates together so they are all used to generate new pages at the same time.		
	Site Administrator or Delegate	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Framework	Generates Frameworks complete with new folders, forums, chat rooms,		

Generation	pages and modules for specific contexts such as the Group or Membership contexts.		
	Site Administrator, Staff Administrator, Group Administrator	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Manage Parent Pages	Designate which pages in the web site can be used as parent pages for newly generated pages.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional with Delegated Administration
Manage Common Pages	Common Pages are pages that can be used by all groups or memberships. Different security rights can be set for different contexts. An example is the page the Forums are on; rather than repeatedly add the forum to new group or membership pages, one page is used and accessed by all groups and memberships but only the forum(s) for the specific group or membership are seen.		
	Site Administrator or Delegate	Site Administrator Tasks	Professional with Delegated Administration
Manage Security Roles	Provides an interface for designated Security Role members to use to manage Security Roles. Settings determine which Security Role Groups can be managed, and whether Security Roles can be added or deleted.		
	Site Administrator, Staff Administrator, Group Administrator, Registered User	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
User Pages	Lists the pages that have been generated for a specific user, group or membership. Settings determine whether the page title, etc. can be edited and whether the page can be deleted or not.		
	Site Administrator, Staff Administrator, Group Administrator, Registered User	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration
Move User Pages	Provides a tree-view interface that allows the user to move their own User Pages. Each page has a setting to determine if it is moveable or not.		
	Site Administrator, Staff Administrator, Group Administrator, Registered User	Site Administrator Tasks and Staff/Group Administrator Tasks	Professional with Delegated Administration

Page Control Panel	Designated Security Role members use this module to add additional modules to their pages. Only the modules marked as “Show User” in the Module Templates are included in the list.		
	Staff Administrator, Group Administrator, Registered User	Everywhere needed	Professional with Delegated Administration

Optional UCanUse Content Management System (CMS)

If you want to allow individuals and group and membership members to upload any type of media files including images, video files (including Adobe Flash files), audio files, documents and text/html content, the UCanUse Content Management System is your best option because it is integrated with the UCanUse Membership Services Suite and the UCanUse Delegated Administration Suite. Literally any type of content can be uploaded and made available to individuals, group members, membership members, registered users, or the general public.

The Content Management System works in specific contexts to keep content separate and independent. The four contexts it operates in are as follows:

- Membership Type Context – all content related to a specific Membership Type
- Membership Context – all content related to a specific individual or group membership
- Group Context – all content related to a specific group
- Individual Context – all content related to a specific individual.

You can set the context in the settings or let the settings be generated for you automatically when the Framework is generated for whatever context you desire.

Content can be set to be moderated before it is made available for public view. Moderation options are:

- No Moderation
- Non-Admin Moderation-- all content is moderated unless submitted by a Site Administrator, Staff Administrator, Group Administrator, a member of the Master Moderators Security Role, or a designated moderator of a designated Membership or Group.
- Full Moderation – all content must be moderated by the Site Administrator.

Each module can be set independently of the others.

Just uploading and moderating data would not be enough if you could not display the uploaded content. The UCanUse Content Management System includes several powerful tools for displaying the data. A thumbnail viewer and a list viewer are included and can be set to display different media types and states of submission (whether it is approved or not, whether it is a resource item or not, and according to additional parameters). Clicking on an item will launch the appropriate viewer or offer the file for download.

We provide a multi-lingual Content Layout module to allow individuals and members of a group or membership (or any security roles you desire) to add and format approved content for display

to the public. The content can be mixed with text, links and graphics as desired. When approved audio or video files are added to the Content Layout screen, the appropriate player and markup code is automatically inserted, transparent to the person using the Content Layout tool.

The following modules are included in the UCanUse Content Management System.

Component or Module	Description		
	Suggested Security Role Access	Suggested Install Menu or Page	Included in Version
Content Item Upload and Moderation	Used to upload and moderate content items. Video, audio, images, documents can be uploaded and text/html can be entered or pasted into the module. Provides a simple search interface for moderators. Three moderation modes are available.		
	Registered Users or any Security Roles desired	Everywhere needed	Professional with Delegated Administration or Independently
Thumbnail Viewer	Displays icons of uploaded media types and launches the appropriate viewer. Settings determine which media types are displayed and which statuses are displayed.		
	All Users, Unauthorized Users	Everywhere needed	Professional with Delegated Administration or Independently
List Viewer	Provides a list view of icons of uploaded media types and launches the appropriate viewer. Settings determine which media types are displayed and which statuses are displayed.		
	All Users, Unauthorized Users	Everywhere needed	Professional with Delegated Administration or Independently
Content Layout Module	Allows members of designated Security Roles to design content layouts in a text/html module and uses tokens to insert uploaded media content. The media viewers are inserted dynamically into the content layout without the user having to use any markup code.		
	All Users, Unauthorized Users	Everywhere needed	Professional with Delegated Administration or Independently

Summary of Overview

We hope you can see extensive potential of the UCanUse Membership Services Suite. When combined with the UCanUse Delegated Administration Suite and the UCanUse Content Management System, you can build any type of portal you want with powerful social networking tools.

Our tools are compatible with more 3rd party tools and we have integrated Active Modules' Active Forums and Active Social, and the Flash Chat module into our UCanUse Delegated Administration Framework Generation process. You can specify dedicated forums and chat rooms to be automatically generated for your individuals, groups and membership members, complete with the correct permissions being applied to each.