

On-Line Statements

Version 06.09.08

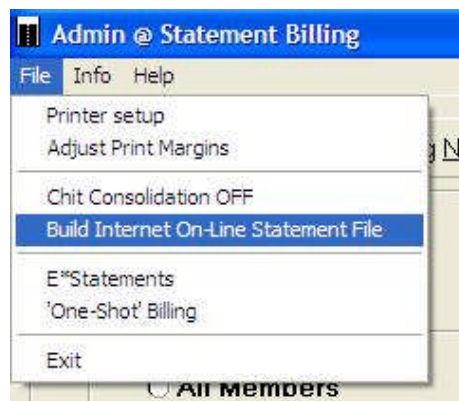
On-Line Statements

Overview

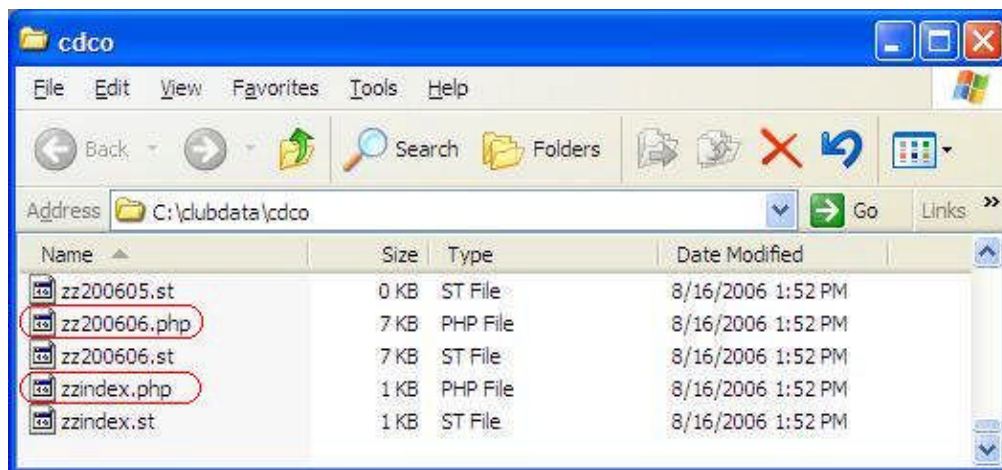
Providing members with the ability to view their statements on-line via the Internet is not a difficult thing to do. The process involves configuring the web site with the capability to use the PHP language (most web sites provide this capability), assigning IDs and PINs to member accounts and periodically uploading two data files to the web site that contain current member IDs and PINs and current billing information. The billing information can be generated and uploaded to the web site daily, weekly or as frequently as the user desires.

Club Office Procedures

There is nothing to install into Club Office. The statement printing module (billing.exe) includes the FILE menu option to “Build Internet On-Line Statement File:



Selecting this option creates a set of data files for the current billing month. The files have the file extension “.php” and by default, are located in the main CDCO folder where Club Office’s data files reside. The file names begin with the letters “zz” making them appear at the end of the list of files and easy to locate when viewed alphabetically:



In the above example, the data file is for June 2006 (**zz200606.php**) while the file that contains member IDs and PINs is named **zzindex.php**. Whenever a member ID or PIN is changed, a new **zzindex.php** file should be uploaded to the web site. (Note that a separate set of similar files are an “.st” type. Either ignore or delete them; they are similar data files for an earlier PERL version of the online statement program and will not function with the PHP version.)

Uploading the Data Files to your Web Site

Because of the infinite variability of web site architectures this topic is best managed by working directly with your web site manager. The data files must be installed in the same location on the web site as the `getstatement.html` and `showstatement.php` scripts (included on the CD in the `STMT` folder). The CD includes FTP software for Windows in the `ftp` folder that you can install and use to upload files of any type to your web site. (We like FTP Commander as it is quite easy to configure, use and transfers files very quickly.)

Configuring Your Web Site to Display On-Line Statements

Simply put a link on one of the pages of your web site to run the `getstatement.html` file. Most web sites have an `index.html` or other default startup page that is automatically displayed when a visitor accesses the web site. This typically is called the “home” page. Some web sites include a link to a member-only page and it’s probably a good idea to put the link to the `getstatement.html` file on a page that only members can access. Using the On-Line Statement Viewer page is self-explanatory; the `getstatement.html` page appears as follows in a browser:

On-Line Statement Viewer

Please type your Member #, ID and PIN into the boxes provided. Select the Year and Month to view. Finally, click the View Statement button.

Member #:	<input type="text" value="249"/>
ID:	<input type="text" value="249Car"/>
PIN:	<input type="text" value="•••••"/>
Year:	<input type="text" value="2006"/>
Month:	<input type="text" value="06 - June"/>

If you don't have or can't remember your ID and PIN or need help using the On-Line Viewer, please contact the business office.

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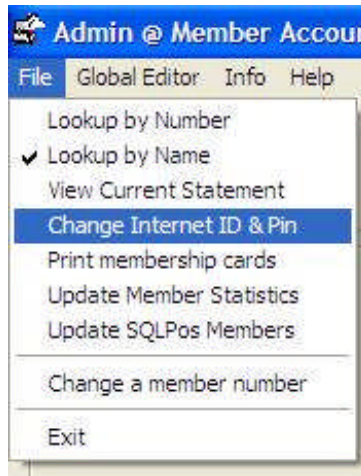
Installation – Simple Example

Once `php` has been enabled on the web site, installation could be quite simple. For example, on our company web site, we simply created a `stmt` folder, put the `getstatement.html` and `showstatment.php` control files into it and uploaded the `zzindex.php` and `zz200606.php` files into it as well. In a browser, we typed www.clubdata.com/stmt/getstatement.html to view the expected statement viewer page. You can view our sample on our web site by going to the above address, too. Use member #249, ID: 249Car, PIN: TMT134, select 2006 and 06-June (as you see in the example above) and click the View Statement button to see our test sample statement in your own browser. (IDs and PINs are case-sensitive – type carefully.)

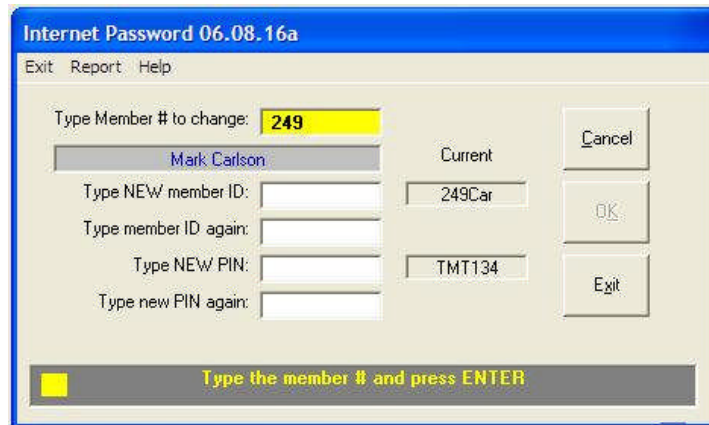
Note that this simple installation example is offered as a good starting place and *may not work* on your club’s web site. However, it *probably will work* if PHP is enabled.

Assigning Member IDs and PINs

The IDs and PINs can be assigned manually and individually or globally. The module is accessed via the FILE menu of the Membership Manager:



If a member account has already been recalled to the membership manager's screen, the member's ID and PIN will automatically be displayed; otherwise, the fields will be blank:



The small yellow box in the lower left corner is a "hot" button that enables the "global generate" capability. This is a handy feature to use to create first-time IDs and PINs for all members.



Caution: the global generation replaces all existing IDs and PINs with system-generated information – be careful not to use it unless you intend to wipe everything clean!

Security: Member#, ID and PIN vs. Member# and PIN only

Two matched sets of the HTML and PHP scripts are provided. One set requires the member to enter the member #, ID and PIN while the other requires only the member# and PIN. You control the level of security for your members by which pair of scripts you use on your web site. Both sets of scripts are in the `stmt` folder on the CD; be sure to use the matched set!

- **Member#, ID and PIN:** use `getstatement.html` and `showstatement.php`
- **Member# and PIN only:** use `getstatement2.html` and `showstatement2.php`

Gathering Member-Defined IDs and PINs

The internet password module includes a “Report” option that can generate a letter to each member requesting that he/she provide the ID and PIN of their choice. The bottom of the letter includes a cut-off area they can mail back to the club. The letter is formatted for a standard #10 window envelope and is likely compatible with your club’s stationery.

Modifying the `getstatement.html` and `showstatement.php` files

`getstatement.html` (or `getstatement2.html`)

Unless you are skilled at web site design and understand HTML, you should not attempt to change the provided `getstatement.html` file. It is certainly possible to use `<include>` and embed it inside another page, edit it, insert your club logo or other graphics, provide other information or even completely redesign it, but you must not change the core functionality of the data fields the file provides via the POST function to the `showstatement.php` script.

`showstatement.php` (or `showstatement2.php`)

This is a standard php script developed using php version 5.0.2. The script is well-documented so that a qualified php developer can follow the script’s logic flow.

Important: the `getstatement` and `showstatement` files form a matched pair. If you use `getstatement2.html` then be sure to use `showstatement2.php` with it. There may be other matched pairs provided on the installation CD – be sure to read the “`readme.txt`” file in the `stmt` folder on the CD for any last-minute documentation.

Making Your Web Site PHP-compatible

PHP is a powerful and popular script-based “server-side” languages that can be installed on Windows, Linux or Macintosh-based web sites that use Apache Web Server software. Most commercial web sites provide php-compatibility without cost – it only has to be “enabled” on the site. While the php scripts provided by Club Data have been designed using php version 5.0.2, they should run on virtually any version of php after version 3.0.

Enabling and/or installing PHP on your web site is a task either for your web site manager or your Internet Service Provider (ISP) and is beyond the scope of this documentation or Club Data’s support.

Security – Protecting your PHP scripts

In the simple example installation described in this document, the HTML pages, PHP scripts and data files were all stored in the same folder on the web server. While this certainly works, such an installation isn’t as secure as it could be and it could be possible for a hacker to gain access to the PHP scripts themselves. However, because of the nearly infinite design layout

possibilities of a web site, the scope of this manual cannot possibly cover every situation. Therefore, these suggestions should be helpful to a web site manager.

- If your site uses Microsoft FrontPage server extensions: consider creating a sub-web that is private -- open to your members but not to the general public. Then put the STMT folder and all the files inside the private sub-web. You could also place the HTML and PHP scripts into the `_vti_bin` or `_private` folders for even greater security as these folders are generally accessible only to the web site manager.
- If your web site is hosted on an Apache server, you could place the PHP scripts inside the `bin` or `cgi-bin` folder, which are accessible only to the web site manager.
- Note that the default scripts are designed to be inside the same folder as the statement data and that placing the scripts in a different folder than where the data resides requires editing the scripts so that they point to the proper folder to find the data files. To do that, you would need to modify the lines of the PHP script that initialize the `$getindex` and `$getfilename` variables to include the location of the data files. These variables are set in the `//set datafile variables` section of the PHP scripts. Note also that moving the scripts also affects the `<form action=` section near to beginning of the HTML page that calls the PHP script itself.

Obtaining Technical Support for On-Line Statements

By design, Club Data's On-Line Statement capability is written in a generic format because of the immense complexity and variability of the Internet. As such, the HTML and PHP scripts should be fully functional on virtually any web site when the web site is properly configured to use the PHP language. Club Data's technical support includes the creation of the data files and setting member IDs and PINs but does not extend to technical questions involving the end-user's web site, installing PHP, Apache Server, installing the HTML or PHP scripts on the user's site, editing or modifying HTML or PHP scripts, configuring file transfer software, or uploading data files.

Supplemental Files on the CD

- Adobe Acrobat 7.0 – for Windows
- Apache Web Server version 2.0.52 – for Windows, Linux and Macintosh
- FTP file transfer software for Windows (three options)
- PHP 5.0.2 – for Windows, Linux and Macintosh web servers

License

The end-user is granted a license to use the Club Data On-Line Statement HTML and PHP scripts for as many Club Office Accounting systems as are also licensed by the end-user; a separate license is required for each Club Office system. If the user wishes to use more than one web site for displaying the same data from a single Club Office system, the license extends to each of the web sites on which the data from that Club Office system is displayed.

Disclaimer

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