



Community Enterprise™

Release Notes – CE Version 7.3

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Introduction

These release notes cover changes in Community Enterprise (CE) Version 7.3. The 7.3 features, improvements, and fixes were released over the course of 20 separate builds. The changes are noted below in a section of highlighted enhancement and a section of other changes.

Highlights

This section highlights a number of important improvements in the CE platform.

Documents Module – Document Quick Add Feature Within Web Editor Link Tool

CE 7.3 enables admins who are using the web editor to easily add documents to the Documents module from within the editor Link Tool and then link to the newly added document from within a web page. In the past it was necessary for an admin to browse to the Documents module to add a document and then browse to the Pages module to link to the document from within a web page. Now, adding a new document and linking to it can be handled entirely from within the web editor.

Pages Module – Shortened Add / Edit Page Process

When adding or editing a text only page (that is, a page without channels), the process has been shortened from three steps to one step.

Administration Section – Recent Items Sidebar

CE 7.3 adds a Recent Items sidebar to the Administration Section. This sidebar displays recent items – with links – that the admin has viewed. These items include contacts, organizations, households, committees, events, and application submissions.

Administration Section – Create New Select Menu

The latest version of CE includes a Create New menu on the left side of the Administration Section area. This menu allows administrators to quickly create new items (e.g. contacts, events, organizations, and so on) from anywhere within the Administration Section. These options were formerly available from a sidebar on the admin Dashboard screen. Now they are available on most Administration Section pages in a more convenient format.

Administration Section – Increased Screen Width

Another change to the administration section is the increase in the admin screen width. Whereas the Administration Section screen width had previously been fixed, it has now been changed to expand to the right side of the browser window. In many cases this provides more screen space to work with.

Discounts Sub-Module – Improvements to Discount Sub-Module

In CE 7.3 we have introduced some small improvements to the Discounts module to make it easier to use. Specifically, when viewing the main list of discount records in CE, it is possible to mouse over the name of a discount and see a detailed tooltip with more detail about how the discount is being used in the system. Specifically, this tooltip displays any events or membership types in CE that the discount is associated with. This makes it easier for an admin to understand how discounts have been used in the system. In addition, when an admin adds a discount to an event or membership type, we have added some text to the screen to make it easier to understand how to use the feature.

Various Modules – Added Support Tooltips

This release of CE includes many new support tooltips in the Administration Section of CE. Some of these tooltips provide contextual information only while others provide a dashboard for a particular item such as a Contact, Discount, Page, Article or other items. These dashboard tooltips allow an administrator to quickly and easily see detailed information about an item without having to open the item.

Reports Module – And / Or Grouping

Version 7.3 of CE improves the reporting module by adding And / Or grouping of filters to reports. In the past, custom reports allowed multiple filters but required either all And or all Or filters for a report. With this new feature, a single report can include both “And” filters and “Or” filters. When using both “And” and “Or” filtering in a single custom report, the feature allows grouping of filters (e.g. A AND (B OR C)).

Advanced Member Search Improvements

This version of CE introduces a number of improvements to the Advanced Member Search functionality in CE. These improvements include a new “Quick Search” option that allows users to search on a city, state, or zip code from one single text field. These improvements also include allowing users to directly email members who display in search results. In addition, there are new controls to allow members to better manage their profiles and include / exclude themselves from the member search feature.

Documents Module – Mass Feature / Unfeature Documents

CE 7.3 adds a new feature to allow administrators to select multiple documents (by checking a checkbox) and then flag them all as a Featured document at one time. Similarly, administrators can also “Un-Feature” multiple documents at one time.

Applications / Events Module – Added Certificate Approval Date and Time Range

This enhancement builds on the certificates functionality to add some new features. Specifically, an admin can now set an approval date and time range for a certificate. With that enhancement, administrators can set a date (e.g. 6/1/2014) and a time span (e.g. 3 years) that will allow them to generate a period of time that a certificate will be active.

Administration Section – New Icons

The latest release of CE includes redesigned icons to display various administrative functions (e.g. add, edit, delete, reorder, export, copy, etc.).

Pages Module – Changed “Content Channels” to “Sections”

In this version of CE, the “Content Channels” function within the Pages module has been renamed “Sections.” Sections are blocks of content (e.g. text, graphics, etc.) that can be edited through a web editor and then either 1) included within a page (e.g. the header or footer files of a theme) or 2) displayed directly as a page through the channels feature.

Pages Module – History and Rollback for Sections

This release includes a history and rollback feature for the Sections functionality within the Pages module. The Sections feature was previously called “Content Channels”. Sections are blocks of content (e.g. text, graphics, etc.) that can be edited through a web editor. In this improvement, CE now keeps past versions of sections and allows admins to roll back to older version of a section (e.g. in the event that content is inadvertently deleted).

Events Module – Added Social Sharing Feature To Events

When adding or editing an event, there is now a check box feature that allows an administrator to include social sharing (e.g. twitter, facebook, etc.) icons in an event listing on the web site.

Events Module – Display Calendars By Category

CE 7.3 allows administrators to create calendar pages on a web site that will display events from only a single category tag. This allows a web site to have multiple, separate calendars for different purposes (e.g. Member Events, Community Events, etc.).

Articles Module – Blogging Display And Related Features

CE 7.3 introduces built in Blogging features. With a new Blog channel and multiple configuration options, users can create blog posts within the Articles module and display them on a web site. Features include the ability to display summaries or full posts on blog, filtering by category, adding social media icons / links, changing the number of pages displayed and more.

Pages Module – Copy Page Feature

CE 7.3 adds a new feature that enables an admin to copy a web page with just a click. Pages can be copied to the same site or to a new site within the system.

Manage Your Profile – Added New Renewal Links From Profile Tabs

To make the user experience easier, this version of CE allows users to click new renewal or payment links directly from the Membership or Events tabs of the Manage Your Profile area on a web site. If users are logged in, they can view their profile and click to renew or pay from directly within these tabs.

Events Module – Added Options To “No Prices Available” Screen During Event Registration

CE 7.3 provides new options and features to help users and administrators manage the scenario where no prices are available to a user who is registering for an event. This can happen if, for instance, a user’s membership has lapsed and they are trying to register for a member’s only event. Then this happens, a screen is displayed with a generic message that no event prices or registration options are available. This can be confusing to some users.

With the new enhancements, the system displays a more useful message when a user registers and pricing is unavailable because of a lapsed membership. Moreover, the admin has the option to create a more detailed message for display in this scenario (to over-ride the default message). This can be done by creating a content “Section” in the Sections feature of the Pages module with the title “Event Price Options Update Membership”. If that content section exists, it will be displayed at this point and can, if desired, provide the user with a link to renew membership on the spot.

If the user who is registering for an event encounters this “No Prices Available” screen for a reason other than a lapsed membership, the system provides a generic message. However in this case as well, the admin can now enhance the message with custom Section content. In this case, an admin would need to create a “Section” (in the Pages module) with the title “No Event Price Options Message”. If this section exists, CE will display it as a supplement to the default “No Prices Available” message.

Pages Module – New Clear Cache Feature

In this version of CE, server caching improves overall performance. Most of the time, the caching is managed automatically without any need for intervention. However, in some cases, such as when a client edits their design theme files (e.g. header.cfm / footer.cfm), it may be necessary to manually clear the server cache so that new changes take effect. For these situations, a new “Clear Cache” button has been added to the Admin Settings screen within the admin Pages module. When an

administrator clicks that button, CE will clear the cache of files related to the design theme so that changes appear correctly.

Other Enhancements and Various Fixes

Version 7.3 includes many smaller enhancements or more technical enhancements.

Enhancements include:

- 10166 – Small improvement to earlier feature related to alerts sent when a login fails and the contact does not have an email address in their record.
- 10422 – Improvements to deployment process
- 10509 – Made Articles List screen the default for the Articles module with a configuration option to set the Task List screen as the default.
- 10597 – Added more settings / variables to configure during the initial deployment process.
- 10639 – Improvements to forum integration sync which excludes scenario when a new user is added.
- 10725 – Added on a bit more improvement to an earlier issue managing event registration error handling
- 10775 – Tweaks to security filters
- 10784 – Improvement to viewing document uploads in event that the path to the file changes (as in moving to a new server volume / drive).
- 10789 – Improved security filters
- 10792 – Replace Verity Search with Solr Search for default content searching
- 10793 – Implemented newer email send process
- 10794 – Improvement to geolocation sync for advanced member search. When a zip code is updated, the geolocation data is also updated.
- 10795 – Added code to limit un-needed search bot requests to empty calendar screens
- 10798 – Caching queries related to error management
- 10799 – Implemented query caching in theme display for improved performance
- 10800 – Commented out legacy code related to selecting and displaying custom home pages.
- 10806 – Add two date fields to the submission records within the Applications tab of the Contact Profile (in the Contacts module)
- 10807 – Small change to styling for store items on web site
- 10808 – Added more query caching to admin section for performance
- 10809 – Added admin settings from different modules into the application variable scope for easier access and performance improvement.
- 10813 – Small validation improvement to event guest registration
- 10818 – Improvement to email open metric processing
- 10819 – More work on email validation
- 10820 – Small improvements to make email send process a little more efficient
- 10821 – Improvements to security filter
- 10822 – Removed legacy content search channel
- 10823 – Removed earlier version of web editor
- 10824 – Removed code related to earlier version of web editor
- 10827 – More clean up in selecting proper emails for sending
- 10830 – More security filter improvements
- 10833 – More small improvement to email send process
- 10834 – Implemented security filters
- 10835 – Encryption changes and other improvements related to tracking email open metrics
- 10836 – Removed deleted email lists from showing up in contact profile Email tab by default
- 10837 – More improvements to security filters

- 10839 – Additions to security filter
- 10842 – Removed redundant security filter
- 10843 – Improvement to admin search process
- 10844 – Removed legacy code related to selecting and displaying custom home pages.
- 10845 – Added limit of 200 images per folder in the image library
- 10846 – Modified admin tag filters
- 10848 – Improved error handling when mal-formed document display url is called in a request
- 10850 – Added new security filters for website request
- 10852 – Improvements to data being passed to PayPal during event registration
- 10855 – Improvements to Activity Module landing page
- 10856 – Improved activity description generated during admin event registration.
- 10864 – Added alert to page shortcut feature in cases where there duplicate shortcuts are created.
- 10865 – Improved security filters by extending tag exceptions to “Sections” in the pages module.
- 10866 – Adjusted security filters for page preview scenario for super users and site administrators
- 10867 – Organized and improved error codes
- 10868 – Improvements to provide more information for prices and discounts when adding / editing an event from the admin side of the system.
- 10869 – Added ID to list display of sites and discounts
- 10872 – Removed Solr search indexing when adding a new contact to db to improve performance.
- 10881 – Added Admin Settings screen to Forum module to allow more configuration of forum integration.
- 10882 – Small improvement to email notification during forum integration
- 10883 – Improvements to syncing forum integration changes when email is being used for login
- 10889 – Added un-process order feature to admin event registrations (plus a few other tweaks to the formatting of the view order screen).
- 10893 – Adjustment to security filter
- 10894 – Added ExternalID field to Document table to help manage duplicates during scripted document imports.
- 10895 – Improved report filters to exclude false positive dates
- 10896 – Improved handling of admin membership data display when membership data is missing or malformed (e.g. 204 instead of 1014).
- 10897 – Added Create Date column to Documents module landing page list
- 10898 – Changed default sort order to descending for the documents list on the Documents module home page.
- 10901 – Fix to custom email footer feature
- 10903 – Added variable to email archive display channel to make styling and layout easier
- 10906 – Improvement to setting time frames (e.g. last 6 months) in Transactions report data
- 10907 – Small improvements to layout of View Transaction screen
- 10908 – Changed deployment process so that more contact profile tabs are enabled by default
- 10909 – Tweaked spacing in confirmation message on screen in Contacts module
- 10910 – Re-added SiteID / NodeID variable to a couple of screens.
- 10916 – Clean up / tweaks to Author Admin functionality
- 10917 – Disables “Issues Position Order” field in Articles module (with setting to turn it back on)
- 10918 – Small improvement in sizing of Categories select box in add / edit article screen making it larger or smaller depending on the number of categories.

- 10919 – Small improvements in on screen names of several channels related to the Articles module.
- 10926 – Small UI improvements to the contact profile Login tab.
- 10927 – On Search Results Settings screen in Contact module, made “Name” checkbox always checked (because the Name is a required field in the list of contacts)
- 10928 – Moved some request variables to a new location within the file structure
- 10931 – Disable Categories select box by default on Add / Edit Page screen
- 10932 – Small improvement in sizing of Categories select box in add / edit page screen making it larger or smaller depending on the number of categories.
- 10943 – Small change to Store to improve styling.
- 10944 – Added price to default store admin landing page list of products
- 10946 – Re-instated IsActive feature in Articles module
- 10950 – Small change to admin articles display increasing number of records displaying per screen
- 10951 – Added initial portions of new themes functionality
- 10956 – Added CAPTCHA security feature to Event Submission channel
- 10959 – Added filter to Documents channel display to only count a document as being within a topic or sub-topic if a user has permissions to view the document.
- 10962 – Technical change to improvement bounce metrics in bulk emails and proof emails. Changes include making bounce variables separate rather than part of a string that needs to be parsed.
- 10964 – Make some fields (author, rating, publish date) configurable on web site document summary displays. Also, makes the “Availability” label configurable. Configuration settings are located in Admin Settings screen within the Documents module.
- 10965 – Improvement to allow query of admin settings for a single module rather than all admin settings at once.
- 10970 – Add the ability to list more than one email address in email cc and bcc fields within CE (such as when a custom event registration confirmation email is set up with cc: and / or bcc: values.
- 10986 – Improvements to custom membership emails for organizations and membership expiration automation for organizations
- 10990 – Added some CE Settings variables to CF Application scope variables for improved performance.
- 10994 – Removed old email validation
- 10995 – Added new extensions to email validation (e.g. .coop).
- 10998 / 10999 – Improvements to error handling and alerts in admin event registration process.
- 11001 / 11004 – Improvements and efficiencies for Add Contact process
- 11010 – Related to 10906 – Improvements to automating the update of the time frame of the Transactions report data (e.g. “Last 6 Months”).
- 11011 – User interface improvements to View Submissions screen(s) including improvements in the workflow status dashboard.
- 11013 / 11014 – Added Application Stop / Restart feature to enable easy refresh of application variables.