



Community Enterprise™

Release Notes – CE Version 7.2

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Introduction

These release notes cover changes in Community Enterprise (CE) Version 7.2. The functionality covered in Version 7.2 was released over the course of 42 builds.

Events Module – Ability to disable login fields in registration form

CE 7.2 enables an administrator to disable login fields (e.g. username and password fields) from the event registration form for any event. This can be helpful in some cases when the login fields are confusing to users or present an unnecessary step in the event registration. This enhancement extends a feature that previously existed in the events module on a global basis. Now, however, it is possible to disable these registration fields for individual events without changing them for others.

Disable Login Fields In Event Registration Form

Events Module – Quotas for specific price / registration options

This latest release includes the ability to create event registration quotas for specific event price options within CE. Whereas in the past a registration limit or quota could be applied to an overall event, now each price option for the event can have its own quota. This is useful in situations where an event such as a conference includes multiple separate activities (e.g. “Saturday Dinner,” “Sunday Golf Outing,” etc.) which have separate seat limits.

Quantity Available:	<input type="text" value="50"/>
Display Availability When Level Falls To:	<input type="text" value="5"/>
<input type="button" value="Submit"/>	

Events Module – Discounts for specific price / registration options

With this release, administrators using CE can now apply discounts to specific price options within an event. Whereas in the past discounts could be applied to an overall event, now each price option within an event can have its own discount(s). This is useful in situations where an event such as a conference includes multiple separate activities (e.g. “Saturday Dinner,” “Sunday Golf Outing,” etc.) which have separate prices which would benefit from discount pricing incentives.

Events Module – Admin Event Registration – Added Quantity Option

Included in this latest release of CE, the admin event registration process is enhanced with a quantity option. In the past, when an administrator was registering a user for an event, the quantity was automatically set to one. This enhancement improves the admin registration by enabling any quantity to be specified for each price option.

Events Module – New Channel – Events List By Category

This new channel allows users on a web site to search for events based on categories (e.g. type of course) and then see a list of matches. This search option filters not only by event category but also by contacts associated with the event as well as by State associated with the event. On the administrative side of the system, events can be set up with these and related data.

Search

Course Title:	<input type="text" value="Titles"/>
Instructor:	<input type="text" value="Instructors"/>
State:	<input type="text" value="States"/>

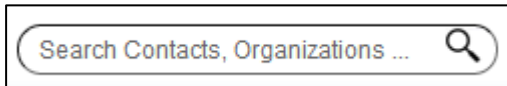
Donations Module – Set Custom Accounts and Transaction Types For Fund Donations

This enhancement allows administrators to over-ride the default Account and Transaction Type settings for transactions that are logged during a donation that specifies a fund. This is very helpful in situations where clients are trying to map fund donations to their organization's accounting specific Account and Transaction data. Rather than having to accept the defaults of "Donation" set by CE, the administrator can set a unique "To Account" and "Registration Type" for each donation to be used by the system in logging donation related transactions.

Contacts Module – Events Tab – New Date Fields Added

CE 7.2 includes a small but useful improvement in the Events tab of the contact profile. This tab shows which events a contact has registered for and the status of their registration (e.g. Completed, Pending, etc.). This enhancement adds two additional fields – Create Date and Payment Date – to the Events tab and sorts the list with the most recent event at the top. This change makes it easier for an admin to quickly understand the involvement over time of its contacts in events.

Global Admin Search



This new release of Community Enterprise introduces a global search feature that is available from all screens in the Administration Section. This search feature initially provides easy search of records in the Contacts and Organizations modules. In the future, additional modules will be added as result sets of this search field. This feature will save users the time they need to find data in the system because they will no longer need to click into specific modules to run searches.

Send Individual Emails (Applications and Contacts Modules)

In the new release of CE, it is possible for administrators to email contacts directly through Community Enterprise and CE will keep a record of these communications. In both the Applications module and Contacts module, an administrator can click the new "Email" icon within a list of contacts to send an email directly to that person. And, CE will keep a copy of all past emails sent this way as part of the activity log. In the past, this kind of emailing required opening up an email screen within a separate email client (e.g. Gmail or Outlook) which would not be captured by CE.

Send Email	
From	admin@citysoft.com
To	bill@citysoft.com
CC	
BCC	
Subject	Dues Payment
Body	Dear Bill,

Applications Module – Admin Only Tabs

For users of the Applications module, this version provides the important enhancement of allowing application tabs (or screens) to be made accessible only to administrators. This enhancement makes it easy to include sections of an application that are used only for evaluation purposes and are not available to users of the public web site or pages.

Email Notifications When Content Is Added / Edited

CE 7.2 introduces a new notification feature that emails an administrator whenever content (e.g. Pages, Events, Documents, etc.) are added or updated within Community Enterprise. This feature is ideal for organizations where more than one administrator is responsible for managing content by providing a central administrator with easy visibility into changes being made within the system.

Subject: Web Page Added / Updated On Your Site	
A Page has been created or updated on the site (
Page Title:	Page 1
Navigation Title:	Page 1
Page ID:	471
Site ID:	1
User ID:	4295
Date Submitted:	15-Aug-12
View Page:	http://test.citysoft.org/index.cfm

Reports Module – Add / Edit Report – Custom Fields Tool Tip Effects

In the Reports module in the new version of CE, when an administrator creates a report for Events or Applications, all the custom fields displayed as options for the report have informative pop up features. These mouse over effects save time for administrators by solving the problem of easily showing the admin which event or application a particular field is associated with. And, these effects provide additional information as well.

Reports Module – Add / Edit Report – Filter By Event or Application

When creating a new event or application custom report in the new version of CE, it is now possible to select one or more events or applications at the beginning of the process. When one or more specific events (or applications) are selected this way, the number of custom fields available to the report is limited specifically to only those events (or applications) selected. This solves a problem for clients with many custom fields of having to

Application List:	
<input type="checkbox"/>	Application With Private Tab
<input type="checkbox"/>	Application2 with private tab
<input checked="" type="checkbox"/>	New Survey
<input checked="" type="checkbox"/>	REO Asset Reservation

choose a few custom fields from a very long list. With these new filters, it is possible to limit the number of fields only to those relevant for the event (or application) that you are focused on.

Reports Module – New Report Template – Contacts and Addresses

A new report template has been added to CE in this release to make it easier to report on address data in CE. Community Enterprise includes several different address blocks (Home, Work, Billing, Shipping, etc.) to accommodate different needs. This report

Address Billing Data	
<input type="checkbox"/> Billing Address1	<input type="checkbox"/> Billing Address2
<input type="checkbox"/> Billing Address3	<input type="checkbox"/> Billing City
<input type="checkbox"/> Billing Country	<input type="checkbox"/> Billing Postal Code
<input type="checkbox"/> Billing State	

template combines all these different address blocks into one template to make it easier for clients to access address data which may be distributed in different parts of its contacts' profiles.

Organization Module – Membership Form – Make Fields Configurable

Included in CE 7.2 is an enhancement to the membership registration form for organization memberships.

When an organization joins as a member via the web site membership form, there is now an administrative

ORGANIZATION FIELD LIST SETTINGS			
Field Name	Off	On	Required
Organization Name			REQUIRED
Description	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Address	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Phone	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Fax	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Web Address	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

option to include or exclude fields in the form as well as to make fields required. This enhancement gives administrators more control over the information that is captured when an organization member joins or renews.

Contacts Module – Membership Tab – Added Membership Notes Field

This enhancement adds a configurable on / off “Notes” field to the membership tab of a contact profile. This field allows an admin to make notes specific to a contact’s membership and then include those notes in reports. This notes field is separate from the more general, global Notes field that can be included in most tabs of a Contact profile.

Applications Module – View Submission – Added Workflow Status Panel

In this improvement, a new status panel has been added to the “View Submission” screen of the Application module. This panel clearly displays status settings for the Submission (e.g. In Progress, Submitted, etc.) and related options. This display makes it easier for an admin to quickly see and more quickly understand the status of a submitted application form.

Applications and Events Module – Certificates

This release of CE includes a Certificates enhancement that enables PDF certificates to be created, displayed, and downloaded in connection with event registrations and application submissions. A small amount of configuration is needed to prepare a certificate file (usually a PDF) to be used in CE. Then, an administrator can automatically create certificates for users who have submitted applications or registered for events. These certificates can be downloaded by the users in the Manage Your Profile screen as well as by the administrators in various admin screens.

Transaction Module – Make Transactions Editable

With this feature, administrators have an option to make transaction records editable. Once enabled, admins can edit transactions (including the amounts) which would normally not be possible.

Applications Module – Clone / Copy Submission

With this feature, an administrator can copy a submission to an application. This can be useful in a scenario where users need to fill out yearly reports or forms with nearly identical information. Rather than starting from scratch every year, this enhancement allows administrators to set up a copied version of an early submission so that only a few fields need to be adjusted. Note that this feature usually requires that an application form be copied. Said another way, a copied submission requires a copied application form to submit to.

Events Module – Event Registration – Guest Registration

CE 7.2 adds new guest registration features to the event registration process. With this enhancement, users registering for events can include guest registrants within their order and choose from one or more different price options. Within the administration section of CE, an administrator can set up an event to include guest registration options and then report on and view guest registrations in a variety of screens.

Application Programming Interface (API)

We have included an API in this release. The initial version focuses on providing mostly content oriented functions that can be accessed from outside the base code (e.g. in the theme header or footer files) to allow developers to get and display content for a wide variety of purposes (e.g. headers, footers, sidebars, menus, etc.). The initial version of the API provides functions to access web pages, articles (including blog posts), sections, and events related content.

Implemented Tabs In Edit Your Profile Feature

With this enhancement, the “Manage Your Profile” screen has been extended and converted into a tabbed structure with multiple tabs and screens of information. Now, when users on the web site log in and click on the “Manage Your Profile” link, they can see some or all of the following tabs: General Info, Membership, Events, Email, Applications, Committees, and Donations. Some tabs can be updated by the user and others simply provide data to the user.

Site Map Channel

This release includes a new channel in CE that displays a style-able site map for a web site automatically.

404 (Page Not Found) Redirect

CE 7.2 introduces a new feature to track and re-direct 404 (Page Not Found) page requests. When the feature is enabled, an administrator can see a log of 404 requests that have been made to the site. The administrator has an option to re-direct any of these 404 requests to a new page with the appropriate request header for search engines. This feature allows an administrator an easy way to manage changed urls to pages (as when a web site it moved).

Membership Module – Allow Price Range For Dues

This new feature allows administrators to create a price range (e.g. \$100 - \$200) for membership dues for a specific membership type (e.g. Gold Membership). In the past, it was only possible to specify a single price for dues (e.g. \$100). This feature is useful for organizations that want to allow members to give more than the minimum amount when joining or renewing their memberships.

Other Enhancements and Various Fixes

Version 7.2 includes a number of smaller enhancements and fixes to issues in different modules.

Enhancements include:

- 7688 – Small improvements to job board
- 9940 – Small improvement to membership reminder emails – carryover from CE 7.1

- 9941 – Added more database indexes to improve performance
- 9980 – Small change to earlier issue in identifying null values in contacts and membership report results
- 10010 – Small tweak in email subscription widget – carryover from CE 7.1
- 10011 – Small tweak to Enhanced Articles display – carryover from CE 7.1
- 10042 – Added sample styles for Application UI
- 10068 – Improvement to event registration quota features which is a carryover from CE Version 7.1
- 10079 – Removed legacy code / features
- 10084 – Minor adjustment to this enhancement in CE Version 7.1
- 10114 – Added sample styles for membership renew widget
- 10123 – Make sure node / site association is complete with new member registration
- 10140 – Implemented new admin style for confirmation messages – carryover from CE 7.1
- 10150 – Small improvements to Email Archive channel which was an enhancement from CE Version 7.1
- 10163 – Removed “Interests” field from Membership report template because it was causing duplicate records when a contact had multiple interests – carryover from CE 7.1
- 10167 – Small language change within User Logins tracking report – carryover from CE Version 7.1.
- 10174 – Added efficiency to Country lookup in address block
- 10183 – Small change to subject of event registration email confirmation
- 10184 – Small addition to membership section of Manage Your Profile screen making membership history more obvious
- 10185 – Added field to contacts and membership report template
- 10186 – Added small UI improvement to the View Orders screen
- 10187 – UI improvement to put custom fields in View mode in admin event registration screen
- 10189 – Removed legacy code
- 10198 – Small language change in Email Template functionality
- 10193 – Small improvement to UI for email
- 10194 – Small language improvement in event registration form fields
- 10195 – Added “Edit Report” link to report display
- 10196 – Updated file types accepted in contact import process
- 10204 – Small language change in admin side
- 10206 – Added Registration Status field to event registration import process
- 10208 – Enable custom styles heets to be displayed within editor per site
- 10212 – Added filtering feature to Applications report to handle scenarios with large number of custom fields in reports
- 10215 – Small improvements to event registration confirmation emails
- 10216 – User Guide update
- 10218 – Various improvements to member registration confirmation emails
- 10225 – Small improvements in process to handle email sending / logging
- 10229 – Added “Notes” field to Contacts related report templates
- 10230 – Added link to the View Email Template screen for creating new email from template
- 10231 – Small adjustment in a couple of admin styles
- 10235 – Added optional width setting for admin screen widths
- 10236 – Small improvement to email footer
- 10237 – Added “Create Date” and “Template” fields to Custom Reports display screen
- 10238 – Changed default sort to descending in Email tab of the Contact profile
- 10239 – Added unsubscribe date to default list in Email tab of Contact profile
- 10240 – Small improvements to email unsubscribe screen / process
- 10245 – Added new function to content component (getPageByParent)

- 10246 – Modified existing function in content component (getArticles)
- 10247 – Made improvement to proof email process
- 10253 – Made improvements to job board rss feature
- 10254 – Made small improvements to email metrics code
- 10256 – Small improvements to feature that associates Membership Types with Contact Types during membership registration (to allow multiple different membership forms)
- 10257 – Reduce the number of unnecessary custom fields showing up in the Events and Registrants report creation wizard
- 10261 – Took the custom report display frame out of an iframe but created an ability to view it within the iframe if desired.
- 10262 – Added link to Contact profile tab from within Email metrics screen for easier integration between module
- 10267 – Increased amount of allowed characters in custom membership reminder / confirmation emails
- 10269 – Adjusted web editor styling to use approach more friendly to email clients like outlook that don't support all html / css specs
- 10271 – Improvement to Show Specific Event channel to list events by most recent when choosing from list during setup
- 10272 – Made it easier to link back to a page from an email (especially when a login is required)
- 10275 – Made it easier to identify section that you are in with menu system
- 10277 – Made event registration form captcha block configurable
- 10278 – Made admin event list screen default and configurable (in case you want task list screen to be default)
- 10281 – Added some small UI improvements to the Role Based Home Pages feature in the Pages module
- 10285 – Allowed the Pages module to handle re-ordering of larger lists of pages in a section
- 10286 – Made improvements to content component
- 10287 – Made improvements to content component
- 10289 – Made CE logout include a better logout of the integrated forum
- 10290 – Added payment type field to Events and Members report template
- 10292 – Added sendmail component to centralize process for sending email alerts
- 10293 – Small improvements to Verity indexing feature
- 10294 – Removed legacy code / features
- 10295 – Added getnavtitle function to content component to centralize this feature
- 10299 – Added node component to centralize node related features
- 10300 – Improvement to donation process that associates a new user with a node / site
- 10301 – Added function to change image paths from relative to absolute in some kinds of emails through the system
- 103005 – Small improvement to applications functionality to make it easier to link directly into an application form
- 10309 – Small improvements in document display styling
- 10310 – Improvements to Verity search indexing process
- 10311 – Added indexes to report tables for improved performance
- 10314 – Added efficiencies to Reports module to better handle 1000+ custom fields
- 10315 – Added index to another report table for improved performance
- 10316 – Improved efficiency of updating report custom fields
- 10317 – Removed report display from iframe
- 10319 – Added <div> code to grid calendar to make it easier to style
- 10320 – Improved handling of committee related contacts in the Reports module committee report template

- 10329 – Improvements to node / site sensitivity and logging the correct nodeid when using the Organizations module (e.g. adding a new organization)
- 10330 – Small improvements in code and file names related to contact search print process
- 10331 – Styling improvements to Print feature in Contact Search results screen
- 10332 – Enable superuser to see all email lists during add / edit email process (not just main node lists)
- 10333 – Added a little styling related code to grid calendar channel to make it easier to style
- 10336 – Improved default styling for member search results print screen feature
- 10341 – Added flag for orphaned orders related to event registrations
- 10343 – Cleaned up admin application confirmation screen after add / edit process
- 10345 – Improvements to contact import by removing and re-organizing code related to solr search.
- 10348 – Small language change to Back and Next links in Application module
- 10349 – Added Organization Name field to Committees and Contacts report template
- 10354 – Small change to remove unnecessary fields from custom fields in Report module template.
- 10355 – Added “Post Date” and “Create Date” fields to the default admin display screen for Applications.
- 10356 – Improvements to node / site sensitivity in Committees module (e.g. when adding a committee, it gets associated with the correct site.
- 10360 – Various improvements to Application workflow process and display
- 10366 – Added notification email to admin when content is added / modified
- 10368 – Admin styles changes to compensate for new styles introduced by cfwindow ajax tag.
- 10370 – Created isAdmin variable to help with styling programming issues
- 10371 – Improvements to language in default membership confirmation email
- 10382 – Added Admin Settings screen to Donations module to locate module specific settings
- 10383 – Added primary contact field to Memberships report template
- 10391 – Improvements to clearing the nav / menu cache in certain scenarios
- 10392 – Added main address block as a custom field option in the event registration form
- 10394 – Upgraded Application.cfm to Application.cfc
- 10417 – Improvements to email metrics
- 10422 – Improved deployment / upgrade process
- 10425 – Improvements to Application.cfc
- 10430 – Added new page content caching for C1 content pages
- 10432 – Added report template for Real Estate module
- 10433 – Improvements to contact import process
- 10455 – Implemented more granular permissions to set what lower level admins (e.g. content creators) can manage and do within the admin Applications module.
- 10456 – Small improvement to admin application workflow
- 10459 – Implemented rounded corners in various admin tabs
- 10461 – Implemented new default design theme and made related theme improvements
- 10478 – Removed legacy code not in use
- 10479 – Removed legacy code not in use
- 10480 – Removed old file not in use
- 10481 – Removed old code
- 10486 – Removed old code / features
- 10489 – Additional small tweak to the contact import process
- 10496 – Extended Page View Logging to admin side of CE
- 10499 – Implemented rounded corners in various admin tabs
- 10525 – Display event registration order even if userid is missing

- 10526 – Display event registration order even if userid is missing
- 10541 – Removed legacy file / code
- 10543 – Add more granular permission options for lower level admins within Applications module
- 10546 – Improvement to “Forgot Your Password” feature where system will notify someone if they don’t have a login to the system.
- 10579 – Implement Sale and Member pricing in receipt for PayPal Standard transactions
- 10590 – Disabled Solr index updates after data import to speed up performance
- 10596 – Removed / disabled old code
- 10597 – Added new screen to deployment screen to set initial values
- 10627 – Removed unused code
- 10631 – Removed unused code
- 10636 – Added handling and alert email for links in emails that exceed character limit in database.
- 10639 – Sync updates of username between CE and Fusetalk
- 10655 – Allow admin to add contacts to email lists from within Email tab of contact profile
- 10656 – Allow contacts to be associated to an organization from within Organization “Associated Contacts” screen (not just from within contact profile)
- 10658 – New feature to log deletes from various modules (e.g. users, organizations, etc.)
- 10660 – Makes job board posts more node / site aware
- 10661 – Improve styling for job board
- 10663 – Make expiration of fuseauth cookie at logout domain specific
- 10665 – Removed unused functionality
- 10667 – Changes to make email process more efficient with changes to activity_user table
- 10673 – Removed unused or legacy features
- 10681 – Added session façade component to manage interactions with sessions
- 10698 – Clean up and tweaks in the Document module
- 10699 – Removed old files from Document module
- 10700 – Removed old code from Document module
- 10705 – Added email validation to event registration confirmation email
- 10706 – Added email validation to add / edit membership email screen
- 10712 – Small improvement to page logging
- 10714 – Made it possible to not include committee record in Manage Your Profile or Membership Form screens that display committee so that these records can be admin-only if needed.
- 10719 – Made the on screen document access denied message configurable
- 10732 – Improvements to organization renewal process
- 10736 – Improvements to information passed through to PayPal to identify transactions
- 10747 – Enable CE to display member-only price options in event registration even if the login option is not used in the registration process.
- 10750 – Removed legacy code / files
- 10758 – Removed legacy code / files
- 10772 – Removed legacy code / files
- 10773 – Removed legacy files