New Features Guide

04/30/2012 Blackbaud NetCommunity 6.45 New Features US

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New Features and Enhancements

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This guide provides an overview of new features and enhancements for Blackbaud NetCommunity 6.45. For information about how to install or update to this version, see the *Infinity Platform Installation and Upgrade Guide*.

Note: You must use The Raiser's Edge 7.91 or higher to integrate with Blackbaud NetCommunity 6.45. For Support assistance, create a case on <u>Case Central</u>. As a best practice, we recommend that you use The Raiser's Edge 7.91 patch 12.

Bulk Asset Management

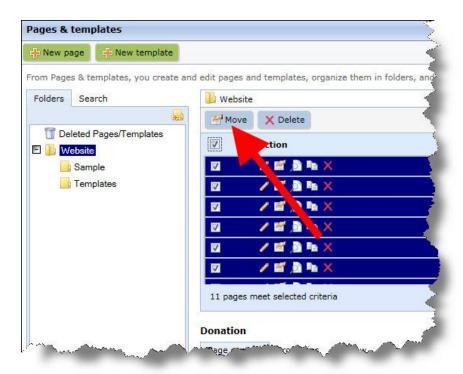
This release includes enhancements for bulk management. For example, you can now move 20 parts to a new folder at the same time. This section describes these enhancements for *Pages & templates*. However, the changes also apply to *Parts*, *Image library*, and *Lists* in *Email*.

When you select **Site explorer**, **Pages & templates**, a checkbox column now appears for you to move or delete multiple pages and templates.

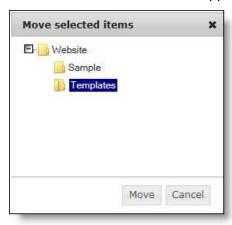


To select all pages and templates on the screen, select the top checkbox above the grid. You can also select data individually by selecting the corresponding checkboxes. To move the selected data to another folder, click **Move**.

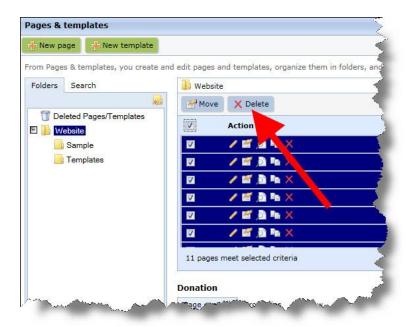
Note: Image library does not include the checkbox column. To select multiple images one at a time, press **CTRL** on your keyboard and click each image. To select multiple images at the same time, press **SHIFT** on your keyboard and click the last image you want to move or delete. This selects that image plus all previous images in the folder. You can also do this in *Pages & templates*, *Parts*, and *Lists*.



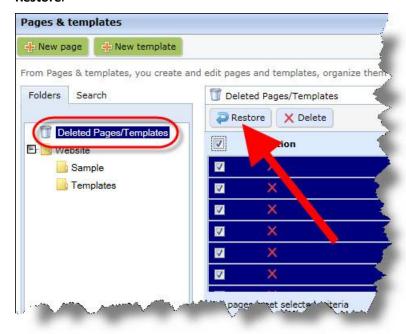
The Move selected items screen appears for you to select a different folder.



To delete the selected data, click **Delete**.



A message appears to confirm you want to delete the data. When you delete data, it is available for you to restore from the new Deleted folder. In this folder, select the checkboxes beside the data to restore and click **Restore**.



The data moves to the previous folder it was stored in. To permanently delete it, click **Delete**. The data deletes from the database and you are no longer able to retrieve it.

Note: The delete changes do not apply to *Lists* in *Email*. The Deleted folder does not appear and you cannot delete multiple email lists at the same time or restore previously deleted lists.

Navigation between Sites

If you host multiple sites, the menu bar now allows you to navigate between your sites.



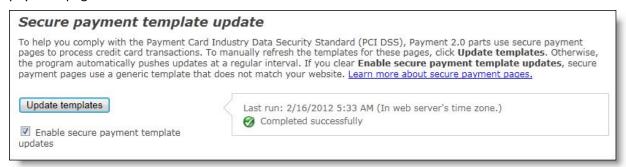
The current site appears on the bottom left of the menu bar, and a new **change** link appears beside it. To manage a different site, click **change** and select the site from the dropdown list. Sites only appear if you have rights to access them.

Administration

The following enhancement is available in Administration. For more information, see the Administration Guide.

Secure Payment Template Update Setting for Payment 2.0

When you manage organization settings under **Schedules** in *Sites & settings*, a new setting appears so you can update your Payment 2.0 secure payment pages with the latest style sheet, layout, and template changes you make for your payment web pages. Under the new **Secure payment template update** setting, click **Update templates** to manually update secure payment pages to include the latest template changes for your secure payment pages.



When you click this button, all secure payment pages for all Payment 2.0 parts update. You cannot select to update a secure payment page for an individual Payment 2.0 part.

Note: If you do not click **Update templates** to manually update secure payment pages, the program holds your changes in a queue. When your content remains static for five minutes, the updates push to the Blackbaud server that checks for changes every five minutes. Altogether, it can take up to 10 minutes to apply the updates to your secure payment pages.

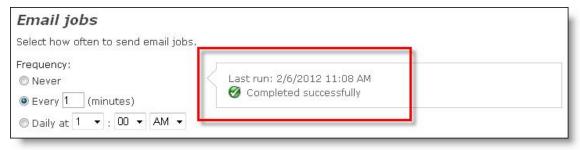
To replace your organization's template for the secure payment page with a generic template, clear **Enable secure payment template updates**. It is unlikely you want to use the generic template because it does not match the rest of your website. However, if your template includes content such as Flash or JavaScript that you do not want to remove but that cannot be used on the secure payment page, you may want to use the generic template. You can also use the generic template if you need to temporarily revert your template updates to the page. When you are ready to use your template again, select **Enable secure payment template updates** and click **Update templates**.

For more information about enhancements for secure payment pages, see Payment 2.0: Secure Payment Page on page 15.

Last Run Time for Services

When you manage the organization settings in *Sites & settings* that apply globally to all the sites you host, you can now view the last run time and the status of services such as email jobs, email lists, and role refreshes.

Under **Schedules**, you establish the schedules for services, and now you can check the inline help beside the settings to see when the services ran last and whether they completed successfully.



Email

The following *Email* enhancements are available in this version. For more information, see the *Email Guide*.

Lists

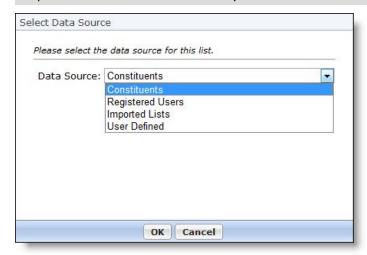
In *Lists*, the Folders and Search tabs now appear beside the gallery. The Folders tab displays the folders where you organize your email lists, and the Search tab displays options that allow you to search for lists by name, data source, or site.

Note: For information about the Folders tab, see Bulk Asset Management on page 1.



In addition, the data sources that you can use to create email lists have also been updated. When you click **New** list in Lists, the options on the Select Data Source screen now only include "Registered Users" for users who have Supervisor rights.

Note: The "Registered Users" data source was previously the "NetCommunity Users" data source. For information about how to use data sources with email lists, see the Email Guide or check the Lists section of the help file in Blackbaud NetCommunity.

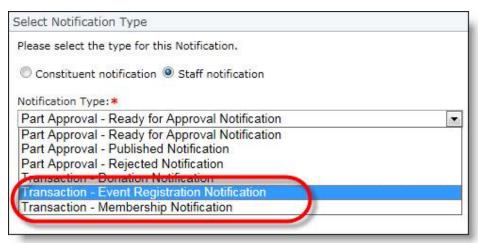


Also in Lists, email lists from User imports are now associated with the site you are logged in to when you run the user import process. These email lists are automatically created when you import constituent information that was exported from The Raiser's Edge to create website users.

Notifications

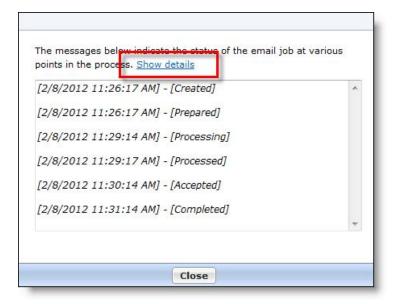
In addition to the "Transaction – Donation Notification" staff notification that was new in version 6.41, you can also now create event and membership notifications to notify a staff member when a website user submits an event registration and a membership transaction.

When you create a new staff notification, select "Transaction – Event Notification" or "Transaction – Membership Notification" to create these new notifications.



Log Information for Emails

From email message reports in *Email*, you can now view additional details about the status of the email messages that you send. When you click **Status log** on a message report, the status log previously displayed the status and time of your email job.



Now in addition to those details, you can click **Show details** to view additional information about the progress of the email message.

Users & Security

The following *Users & security* enhancements are available in this version. For more information, see the *Users & Security Guide*.

User Imports

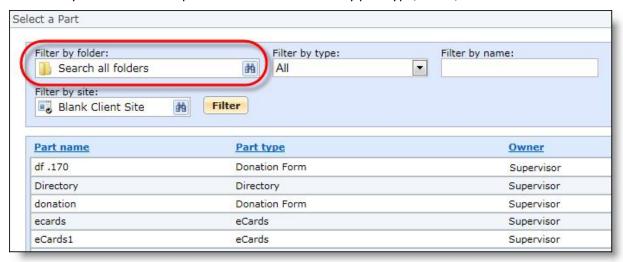
When you import constituent information in *User imports* that was exported from The Raiser's Edge to create website users, the program automatically creates an email list of the users. That email list is now automatically associated with the site you are logged in to when you run the user import process. If you do not host multiple sites in *Sites & settings*, the list is associated with your default website.

Pages & Templates

This version includes updates and enhancements to Pages & templates.

Filter by Folder

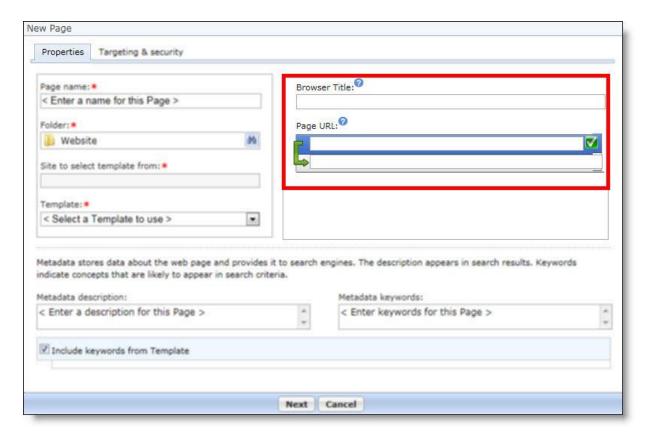
When you select to include a part on a template or page, a Filter by folder field now appears on the Select a Part screen for you to narrow the part list. You can also filter by part type, name, or site.



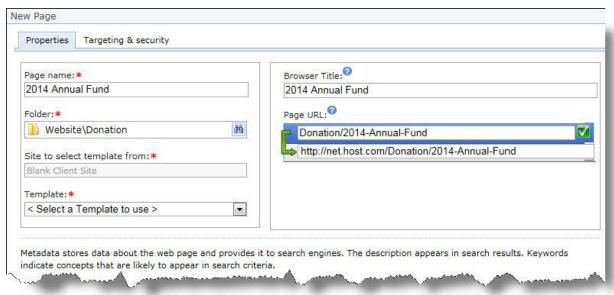
Previously, this field appeared as a tab on the screen.

Page Properties

When you create or edit a page's properties, the Display name field is now called the Browser title field and the Friendly URLs tab has been replaced with the Page URL field on the Properties tab.



When you enter a page name and select a folder to store the page, the page name defaults automatically in the **Browser title** field and the program suggests a URL for the page in the **Page URL** field. The suggested URL is a combination of the page and folder names. For example, if you enter "2014 Annual Fund" for the page name and select to store the page in the Donation folder, the program suggests "Donation/2014-Annual-Fund" for the URL. You can leave the suggested URL or enter your own unique URL for the page.



Note: The program does not include the root Website folder in the URL. The full URL appears just below the Page URL field. You can select the full URL to copy it, but you cannot change it.

In addition to these improvements, these new friendly URLs enhance search engine optimization (SEO) for your website by including keywords in the URLs and links that search engines use to index content.

Upgrade

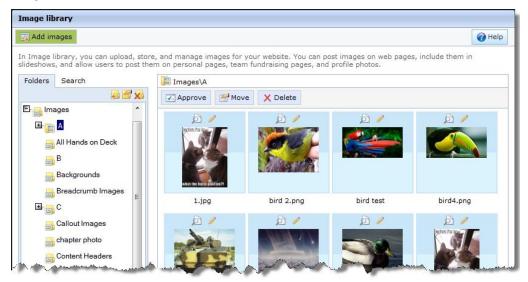
When you upgrade to this release, all of your existing URLs remain the same. This includes friendly URLs and URLs generated by the program. If you change the URL for an existing page in the new version, the old URL continues to work for the page.

Image Library

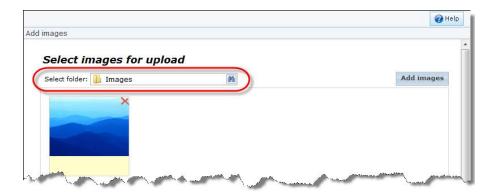
Image library has been updated to improve how you store and manage images for your website. Images are now organized into folders instead of categories, and you can now use tags to identify an image's content instead of relying on categories. In addition, filenames and extensions are now retained when you upload images and then are incorporated into the default URL for the web page that stores the image. Along with these changes, several options in *Image library* have been moved or relabeled.

Note: When you upgrade, the program converts your existing categories to image folders and image tags. For example, if you have a "Volunteers" category, the images in that category will be stored in a Volunteers folder and associated with a Volunteers tab.

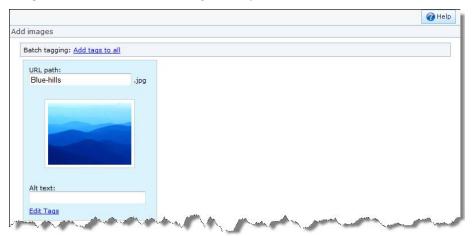
In Image library, a new toolbar appears above the thumbnails to approve, move, and delete images, and you can use SHIFT and CTRL on your keyboard to multi-select images. Preview and edit options still appear with each image.



When you upload images, the Add images screen now asks you to select a folder instead of categories.



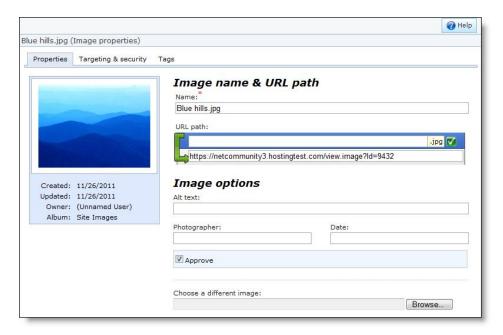
And on the second part of the Add images screen, you can click **Add tags to all** or **Edit Tags** to associate tags with images. Tags are keywords or phrases that identify an image's content, and you can use them to search for images on the Search tab in *Image library*.



The new **URL path** also replaces the **Name** field, and in this field you can edit the end of the URL for the web page that stores the image. To improve rankings in Google image search results, you should make image URLs as discrete and descriptive as possible. By default, the URL includes the image's folder, name, and extension after your domain.

Also, the old **Caption** field has been renamed as the **Alt text** field to more accurately indicate that this field is for the text that appears in place of an image if it cannot display for some reason.

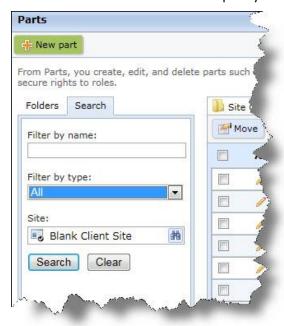
The Image properties screen has also been updated.



On this screen, you can now edit the URL for the web page that stores an image, and the old Caption field has been renamed as the Alt text field. And instead of selecting categories for the image, you can now use the Tags tab to select tags that describe the image's content. The Tags tab for images is the same as for parts, but tags for images are not included in the results for the Suggested Content or Tag Display parts.

Parts

Use the new Search tab in *Parts* to quickly find a part to update.



In the Filter by name field, enter a name or partial name to filter search results. To search for a specific part type, select it in the Filter by type field. In the Site field, you can also select a site to filter search results.

Note: A new Search tab also appears in *Lists* for you to filter email list search results. The **Filter by type** field does not apply to lists, so the **Filter by data source** field appears for you to search by data source.

Review this section for additional enhancements to Parts. For more information, see the Parts Guide.

Share Part across Sites

When you create a site to use as a template for multiple sites, you can now use the **Share part across sites** option for certain parts. The option creates a single instance of the part when you copy the site so you only have to make changes to one version. To limit the users who can edit the shared content, you can assign security rights from the Targeting & Security tab. For example, you can select to share a Formatted Text and Image part that contain's your organization's logo and then specify that only national administrators can update it.

You can select the **Share part across sites** option from these parts:

- Formatted Text and Images
- Slideshow
- Unformatted Text

Note: The **Share part across sites** option differs from shared website part functionality because you must enable the option to use it. When a part is a shared website part, the program automatically shares it when you copy a site. For information about shared website parts, see the *Administration Guide*.

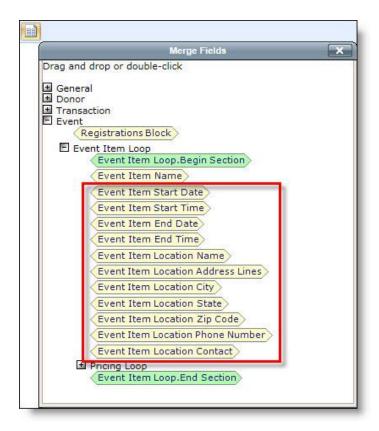
When you use the **Share part across sites** option, you can allow users who do not have permission to edit the template content to create local copies. For example, you can allow users to create local copies of parts that describe event locations. Local copies are not connected to the template content, so they are not updated when you update the template. Changes to local copies do not affect other sites.

To modify parts that use the **Share part across site** option, edit the template content and update all websites that use the content. The program updates copied sites that do not use local versions. If you have security rights to edit template content from a copied site, you can use the **Only update this website** option to create a local copy and only apply changes to the copy.

Note: If you only have security rights to create local copies of parts, a message appears when you edit a part to ask whether to create a local copy. The local copy functionality must be enabled on the template part for the message to appear.

Event Registration Form

When you write content for an event registration acknowledgement, additional event item loop merge fields now appear under **Events**. Previously, only **Event Item Name** appeared.



These merge fields integrate with fields from the event's record in The Raiser's Edge. For example, the Event Item Start Date and Event Item Start Time fields appear on the General tab on the event record.

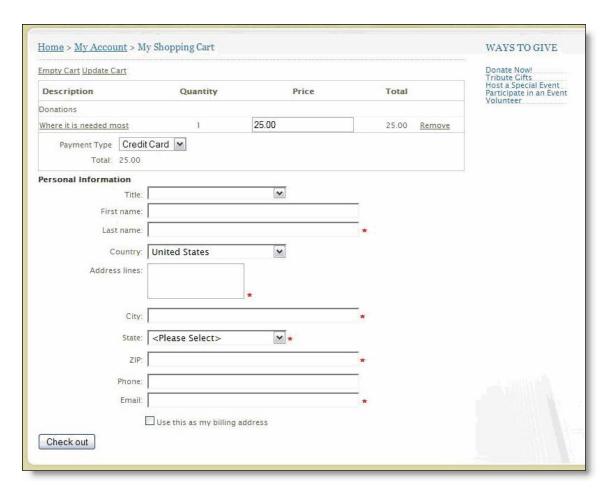
Note: These merge fields also appear for the event registration confirmation screen and on the Email template tab when you create an email notification for an event registration. The email registration notification is a new feature in this release. For more information, see Notifications on page 7.

Payment 2.0: Secure Payment Page

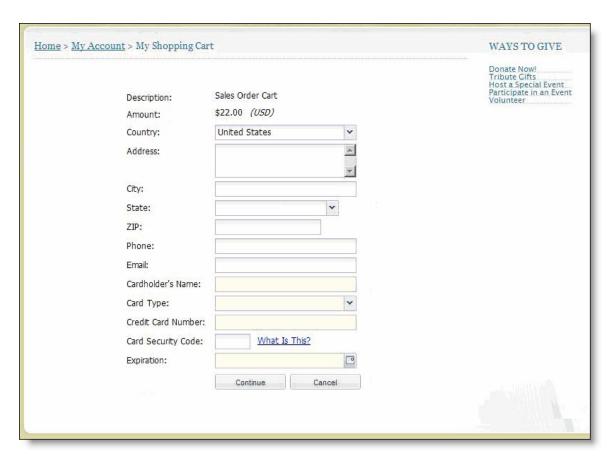
When a user navigates from your payment page that includes a Payment 2.0 part to the secure payment page on the Blackbaud server, the program now uses the style sheet, layout, and template for your payment page to render the secure payment page.

Note: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), the program uses a secure payment page to process biographical billing information and payment information for the Payment 2.0 part. Whether you host your site or Blackbaud hosts your site, the secure payment page on the hosted Blackbaud server processes all credit card payments for the Payment 2.0 part.

For example, this is your web page.



The program now uses this style sheet, layout, and template to render the secure payment page on the Blackbaud server.



Previously, the secure payment page used a generic template to render the page that did not match your organization's payment page.

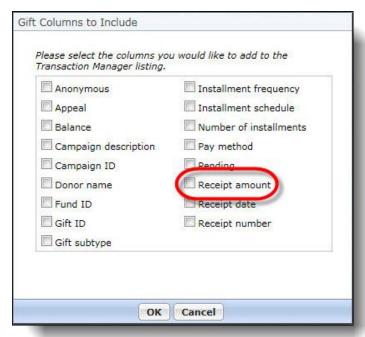
As a result of this enhancement, there are several important considerations to remember about using your template to render the secure payment page.

- When you use the same Payment 2.0 part on two web pages that use two different templates, the secure payment page renders using the template for the page the website user navigates from. For example, your payment page for an event registration uses a template with a red background and your payment page for a donation uses a template with a blue background. When a user navigates from the event registration payment page to the secure payment page, the page renders using the red template. When a user navigates from the donation payment page to the secure payment page, the page renders using the blue template.
- Some parts, such as Formatted Texts & Image and Menu, appear on the secure payment page. Images also appear. However, you may notice that some parts do not appear on the page.
- When you include targeted content on your page, be aware that it does not apply to the secure payment page. No matter the role the user is in, the secure payment page renders the view for an anonymous user the same way your page appears for anonymous users. Anonymous users are users not logged in to your website.
- We recommend you remove parts that contain a Flash file. These files include JavaScript that the secure payment page removes for PCI DSS compliance. If you do not remove the part, an Adobe download message likely appears in its place on the secure payment page.
- Likewise, we recommend you remove graphics that include JavaScript. The secure payment page removes these graphics for PCI DSS compliance. If you do not remove the graphic, the page likely renders incorrectly.
- We recommend you remove third party social media sharing widgets from your page. These links typically include JavaScript that the secure payment page removes for PCI DSS compliance.

- To enhance performance between your site and Blackbaud's server, the program holds updates you make to the style sheet, layout, and template for your payment page in a queue. When this content remains static for five minutes, the updates push to the Blackbaud server that checks for changes every five minutes. Altogether, it can take up to ten minutes to apply the updates to your secure payment pages. You cannot change this process. However, you can click **Update templates** in *Sites & settings* to manually update the changes for your secure payment page. For more information about this new setting, see Secure Payment Template Update Setting for Payment 2.0 on page 5.
- The generic template still exists for the secure payment page. It is unlikely you want to use it because it does not match the rest of your website. However, if your template includes content such as Flash or JavaScript that you do not want to remove but that cannot be used on the secure payment page, you may want to use the generic template. You can also use the generic template if you need to temporarily revert your template updates to the page. When you are ready to use your template again, you select Enable secure payment template updates and click Update templates in Sites & settings. For more information about this new setting, see Secure Payment Template Update Setting for Payment 2.0 on page 5.

Transaction Manager

Under **Choose the columns to display**, you can now include the **Receipt amount** column on the giving history page. To do this, select **Custom** and then click **Add column**. The **Receipt amount** checkbox appears on the Gift Columns to Include screen.

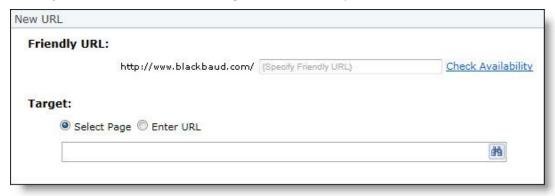


Friendly URLs

With the addition of the page URL enhancements in this release, we recommend you now create and edit most of your URLs on the page's Properties tab. For information about these enhancements, seePage Properties on page 9.

You now use Friendly URLs to allow website users to access web pages with multiple URLs. For example, if your standard donation page is www.example.org/donate, you can create the friendly URL www.example.org/disasterrelief to direct users to that page in response to a natural disaster. You can also continue to use Friendly URLs to link to another website. For example, you can create a friendly URL to link to an elected official's website.

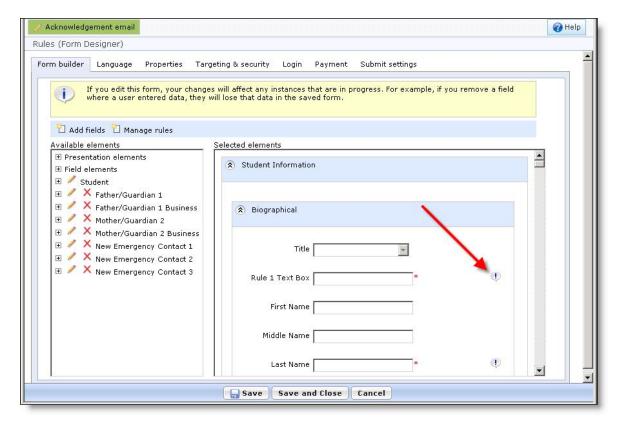
Friendly URLs includes minor enhancements to clarify fields and options when you add and edit a friendly URL. For example, the Specify the friendly URL section is now called Friendly URL and the Specify a page for the **friendly URL** section is now called **Target**. All functionality remains the same.



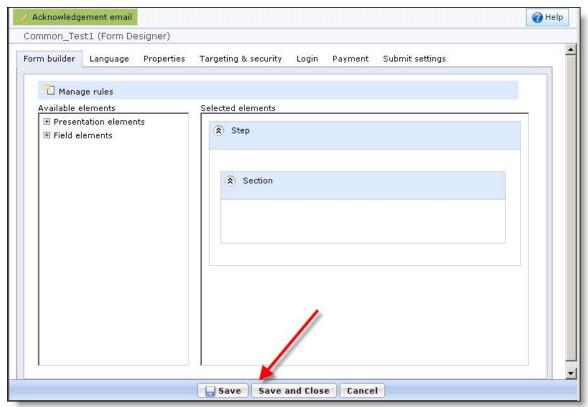
Forms

The following enhancements are available in Forms. For more information, see the Forms Guide.

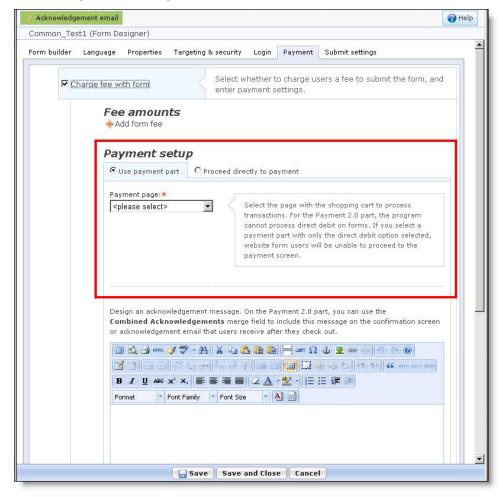
• On the Form Designer, Form builder tab, you now have an indicator to let you know which fields, sections, and steps have a rule applied.



• When you add or edit forms, you can now choose to **Save** the form or **Save and Close**. You do not have to close out of the form to save your progress. You can save the form and continue to work.

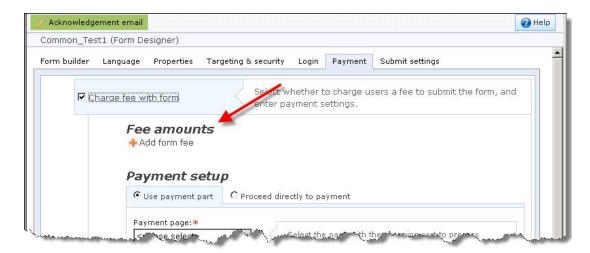


- On forms, when you set up rules, you can now create rules with dropdown and radio button fields in addition to yes or no response fields. For example, if a user selects one of his activities as the creative writing club, you can require him to answer an additional field on the form.
- For online admissions forms, in the Form Designer, for the Applicant category, we added a new field. You can now add the **Inquiry date** to an Online Admissions form.
- When you design your online form, on the Payment tab, when you select to charge a fee when users submit the form, you can now either use your merchant account or use the Payment Part 2.0 part to process the transaction. If you choose to use the Payment Part 2.0, you select the payment page and write an acknowledgement message.

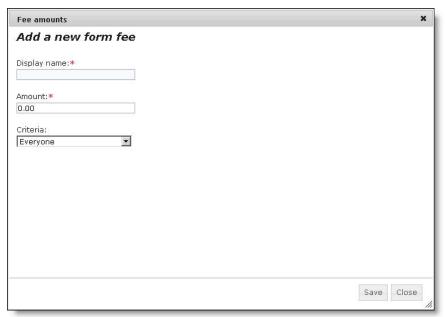


Warning: If you select the Payment 2.0 part, we cannot process direct debits on forms. If you select a payment part with only the direct debit option selected, website form users are unable to proceed to the payment screen.

• When you set up the fees for your forms, you can also now add as many form fees as you need.



For each form fee, you assign a name, amount, and select whether the fee applies to everyone or based on how a website user answers a field on the form. For example, if a website user answers yes to participation in a club activity, you can charge a conditional fee only to club participants.



Email Alerts

When you create a form, an **Email alert** section now appears on the Submit settings tab.



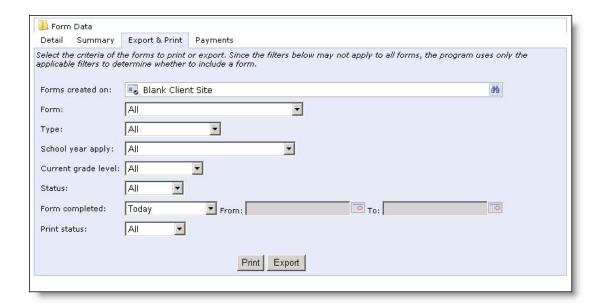
To send an email to staff members when a user submits an online form, select Send an email alert when a user submits a form. Under Add users and roles, you can select to send the email alert individual users and users in a role. In the Email addresses field, you can also enter email addresses for staff members who do not have a Blackbaud NetCommunity account.

By default, the email links to a PDF version of the form. When you select Include form data in the email alert, the form data displays in the body of the email alert.

Print and Export Form Data

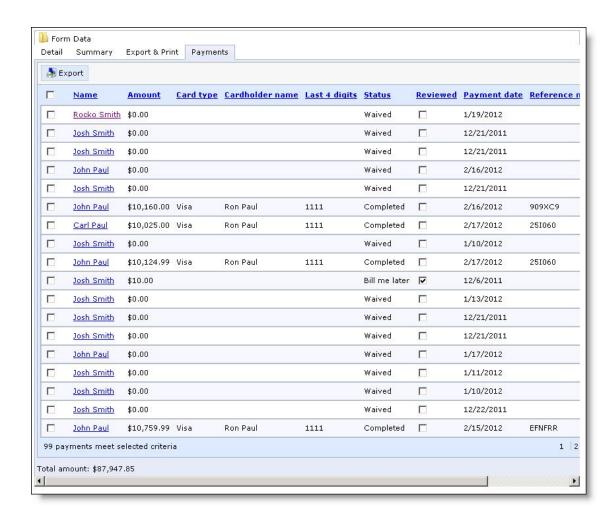
After you place forms on your website, you can now go to Forms to print or export the data that website users submit. To print or export data, from Forms, select the Data tab. In the Form Data, select the Export & Data tab.

On the Export & Print tab, you select criteria to determine which forms you want to print or export from Forms. If you select to export form data, you can save or open a .CSV file. If you select to print form data, a new window opens and your data appears as a .PDF file. You can choose to print the data or save the Adobe Acrobat file. To print the data, from the browser window, click File, Print. Select the name of the printer and your print options, then click OK.



Form Payments

When you manage the data that website users submit in online forms, you can now review the payment information on a new Payments tab. For each form, you can review the submitted data, a summary of the payment information, and export the payment data to a .CSV file. For more information, see the *Forms Guide*.



Single Sign-On with Blackbaud NetCommunity and The Patron Edge Online

Users of Blackbaud NetCommunity and The Patron Edge Online can now use a single sign-on to access both programs while logging in only once. When users log into either Blackbaud NetCommunity or The Patron Edge Online, a Patron Edge Online login screen displays. After logging in, users can access both the ticketing and Blackbaud NetCommunity portals of the sites and can navigate between the two based on the single sign-on feature. Administrators can configure tabs and navigation links in both programs to help users move between pages based on workflow. This feature is available with Blackbaud NetCommunity 6.45, The Patron Edge Online 3.4.1.4, and *The Patron Edge* 3.406.

For more information, see the Single Sign-On Guide for Blackbaud NetCommunity and The Patron Edge Online.