Luminate Online New Features Guide

6/18/2013 Luminate Online v11 New Features Guide US

New Features

The following sections describe new features and updates to existing features in Luminate Online v11. Please share this information with other users in your organization.

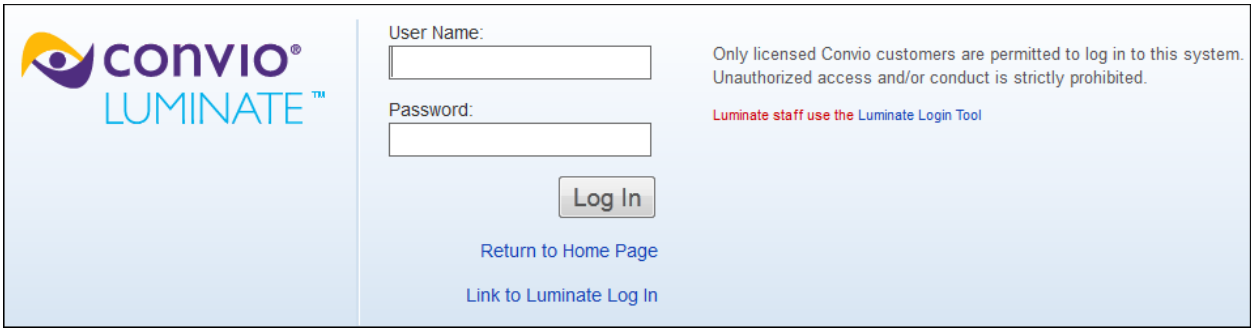
Show Me: Watch videos about some of the features included in this release.

Administrator Login Security

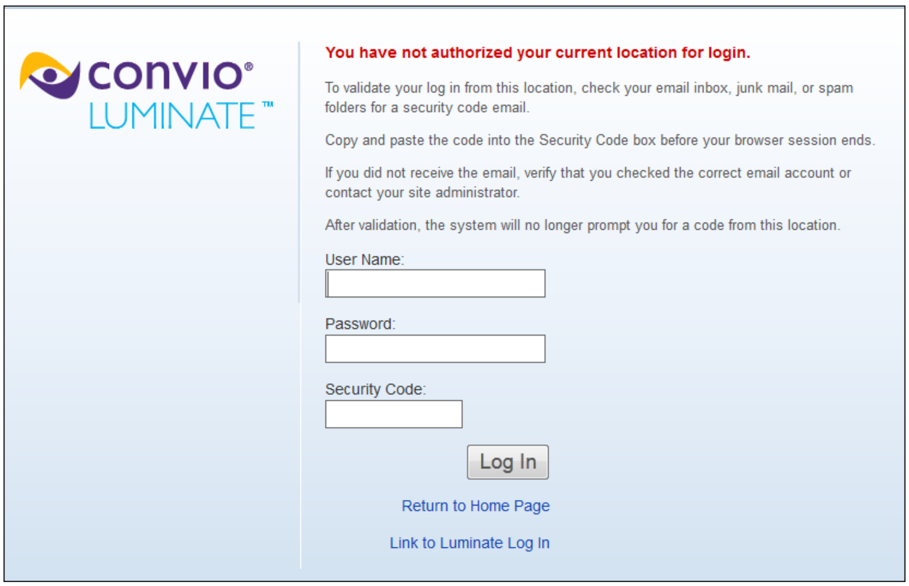
As an added layer of security, Luminate Online administrators must now enter a security code the first time they log in from a new location. After validation, Luminate Online no longer prompts the administrator for a security code from that location.

To log in as an administrator from a new location:

1. Navigate to the Luminate Online Log In page.
2. Type your **User Name** and **Password** and click **Log In**.



Luminate Online reports that you are not authorized for login from this location and sends you an email containing a security code.

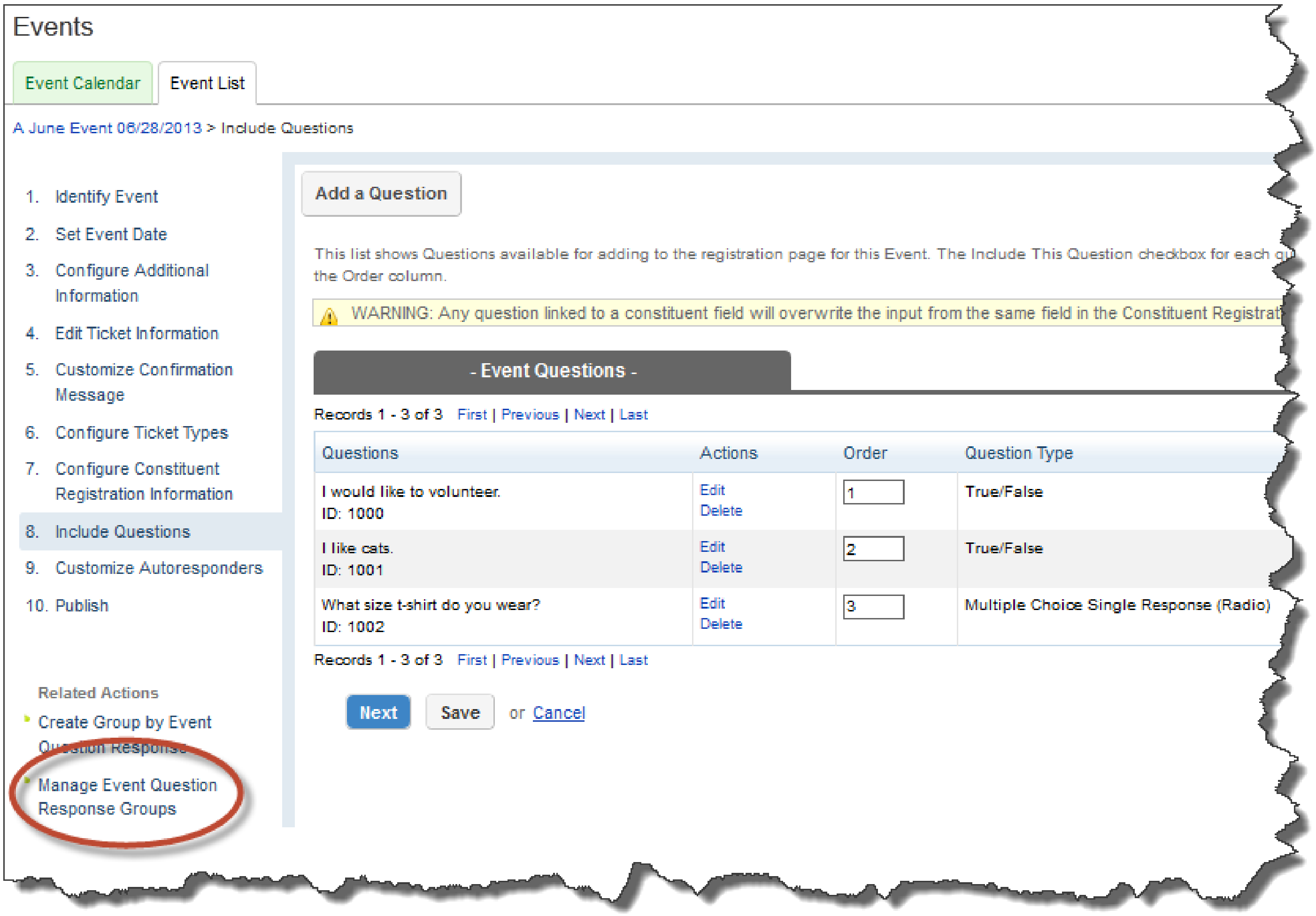


3. Copy the security code from the email to the **Security Code** box, retype your **User Name** and **Password**, and click **Log In**.

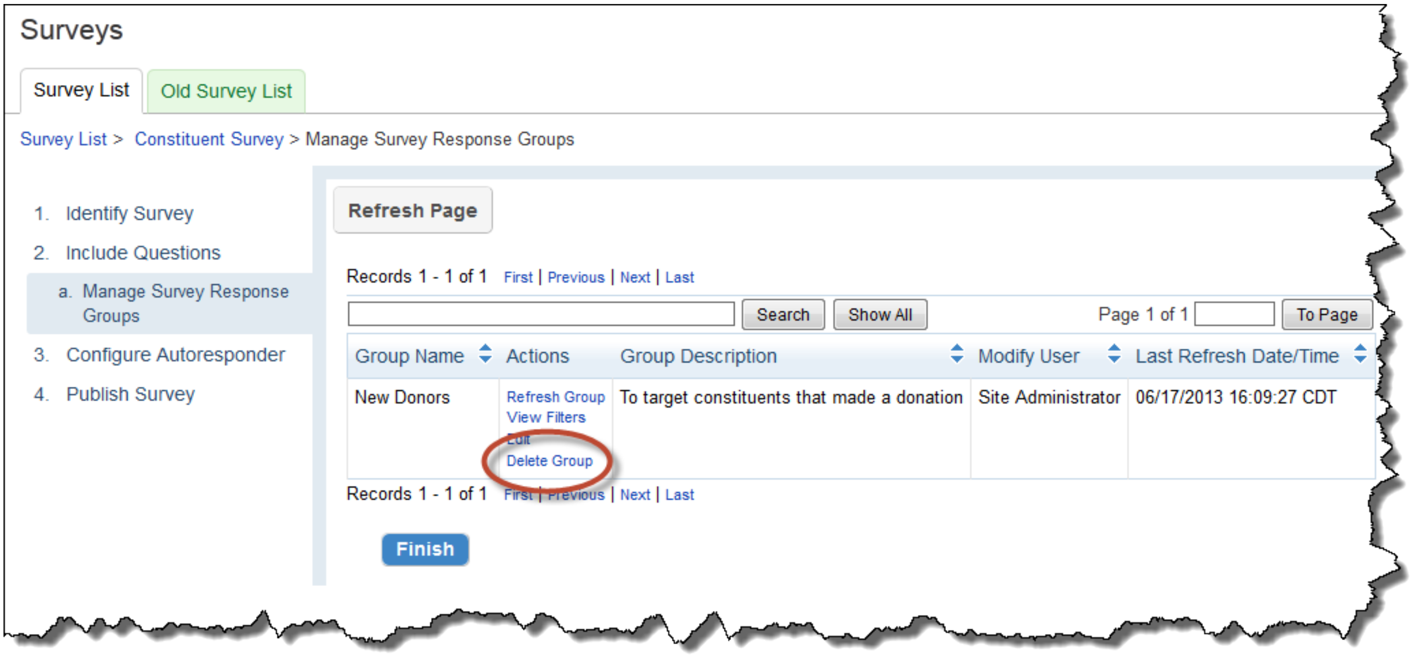
Note: You must enter the security code before your browser session expires.

Managing Event Attendee Groups

A new Related Action, **Manage Event Question Response Groups**, allows you to access the Event Groups tab directly from the **Include Questions** page. Previously, to access the Event Groups tab, you had to open the Events list, click **Manage** in the Actions column (which opened the Attendees tab), and then click the Events Groups tab. This change provides a faster workflow for managing groups.



We've also added a link to delete groups directly from the **Manage Survey Response Group** page.



Creating an Administrator from an Existing Constituent Record

An existing constituent can now be made an administrator by copying their existing constituent information into a new administrator record instead of manually creating their new administrator record. This way the constituent can continue to perform normal constituent activity (like making donations, joining team fundraising events, or purchasing tickets to an event) with all interactions and transactions recorded in this record.

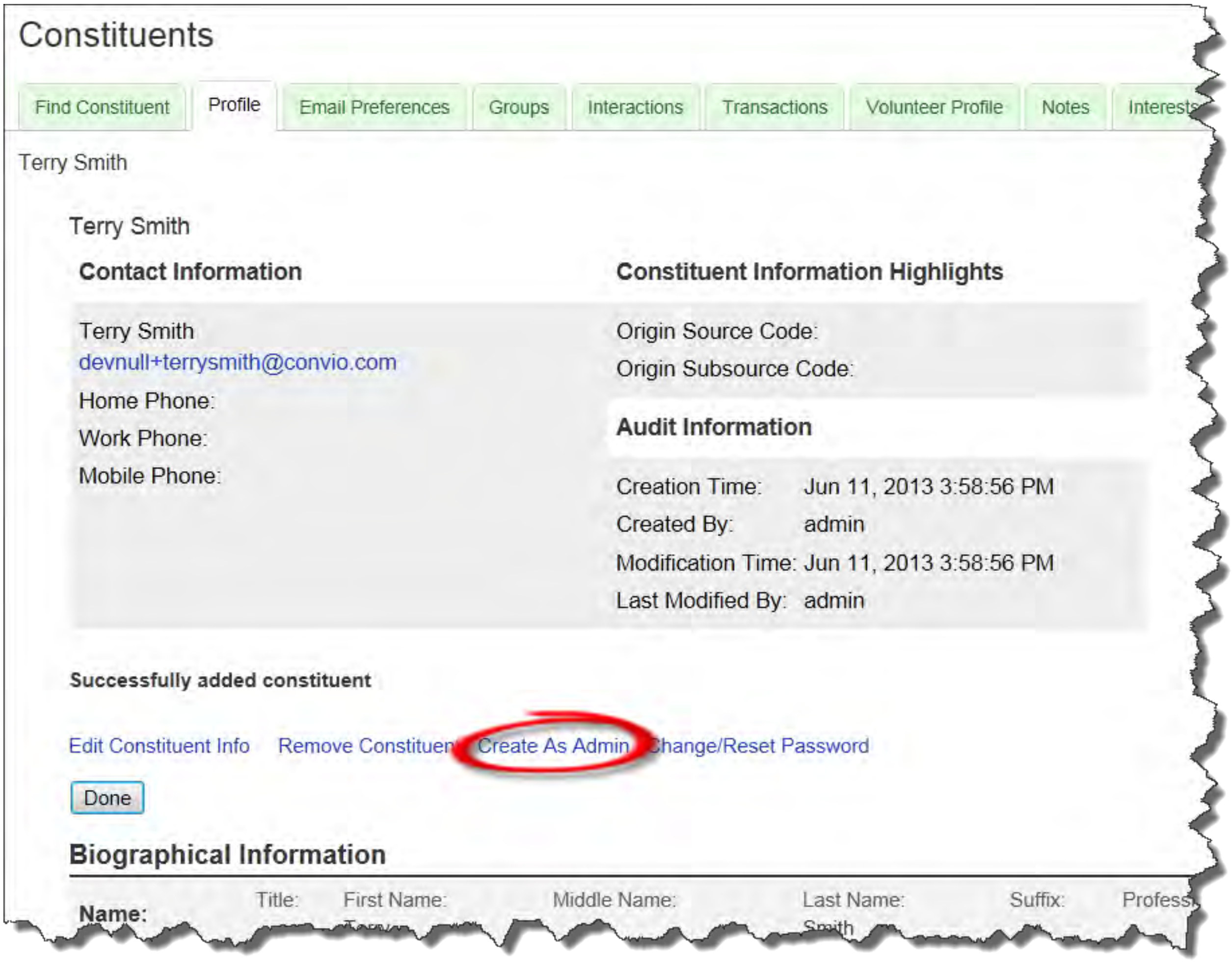
The login User Name must be different for the constituent and administrator accounts. You can either create a new User Name for the administrator record or transfer the existing User Name from the constituent record to the new administrator record and then create a new one for the constituent record.

When viewing the administrator record, a link to the constituent record for this person is available and when viewing the constituent record, the link to the administrator record is available.

If this constituent no longer needs their administrator record in the future, the Remove Administrator action will make the administrator record inactive but keep the constituent record active.

▸ To create an administrator record for an existing constituent:

1. From the options along the top of a Administrator page, click **Constituent360 > Constituents**.
2. On the Find Constituent page:
   a. Enter the appropriate criteria (like the last name) in the search fields and click **Find**.
   b. From the search results returned, click the **Edit** icon from the Action column of the appropriate constituent.
3. On the Profile page of the constituent, click **Create as Admin** (located below the Contact Information summary block).



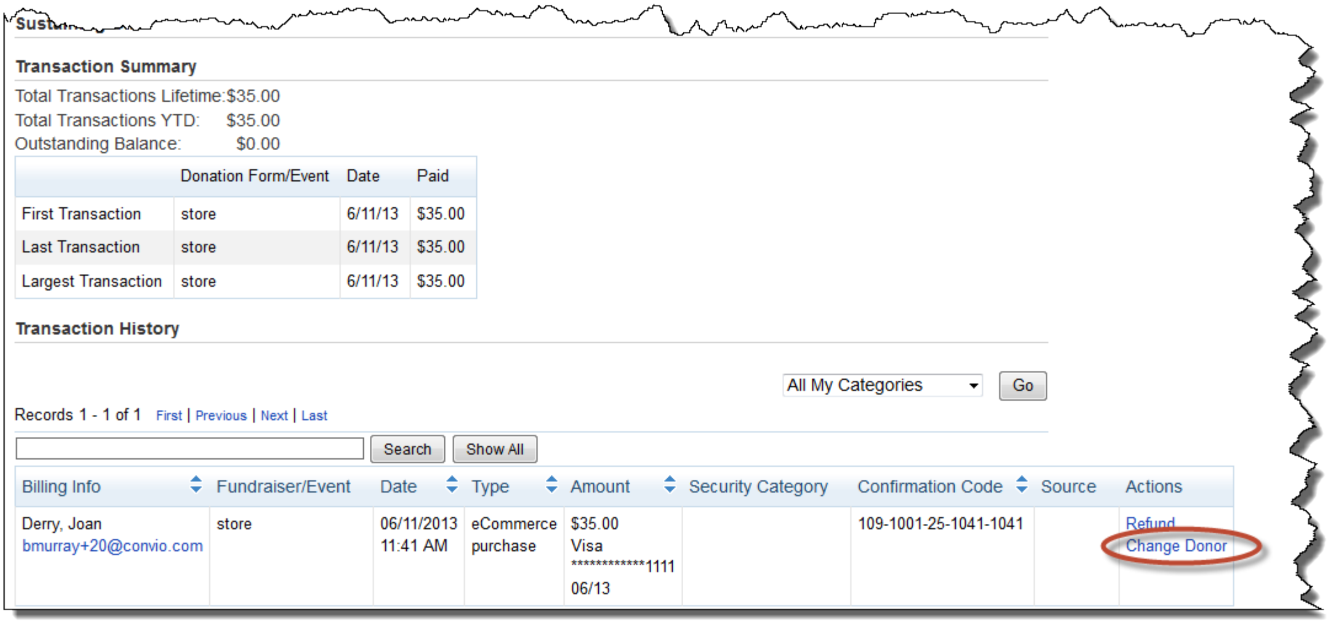
4. On the Set Admin User Name page, enter a **User Name** for the new administrator account and click **Next**. Note that you can assign the existing constituent name (for example, if the account uses an email address) as the administrator name and assign a new name to the constituent login credentials.
5. On the Assign Admin Groups page, click the appropriate **Group Type** (like Site Admins) that this administrator will belong to.
6. Click **Finish**.

Change Donor in eCommerce

Client administrators can now reassign an eCommerce transaction to a different donor. This might be necessary if, for example, a Constituent made a purchase while someone else was logged in. Because they can now change donors, client administrators no longer have to contact support to fix the issue.

eCommerce purchases are listed in the Constituent's profile on the **Transactions** tab. A new link called **Change Donor** has been added to the Actions column. Click **Change Donor** to reassign the purchase. The transaction will be removed from the incorrect Constituent record and added to the correct Constituent record.

This feature is enabled automatically.



Improved Email Security

To help prevent your organization from being spoofed by spammers, we have updated the DKIM signature to include the new 1024-bit version. This version is now required by major Email Service Providers (ESPs) such as Google and Yahoo. For more information, see the Wired article, [How a Google Headhunter's E-Mail Unraveled a Massive Net Security Hole]().

This feature is enabled automatically. However, for security reasons, you should remove the DNS record of the previous DKIM, 512-bit signature by deleting the DNS TXT record, convio1._domainkey.<mydomain>.

Contact Revision IDs Display in Queue Problem Management

New Contact Revision ID fields will now display in the XML messages of Queue Problem Management, allowing you to determine what area of the Contact record was changed and is attempting to synchronize between Luminate Online and Luminate CRM.

In Queue Problem Management, navigate to the **Problem Details** page for a Contact error and click the **XML Message** tab. The following is an example of how the new Contact Revision IDs fields will display in the XML Message:

```
<m:Data name="SubDomainRevisions">
    <m:Data name="ONLINE">
        <m:Field name="AddressRevision" xsi:nil="true"/>
        <m:Field name="EmailRevision" xsi:nil="true"/>
        <m:Field name="BiographicalRevision" xsi:nil="true"/>
        <m:Field name="OtherRevision" xsi:nil="true"/>
        <m:Field name="PhoneRevision" xsi:nil="true"/>
    </m:Data>
    <m:Data name="CRM">
        <m:Field name="AddressRevision">0</m:Field>
        <m:Field name="EmailRevision">0</m:Field>
        <m:Field name="OtherRevision">0</m:Field>
        <m:Field name="BiographicalRevision">1</m:Field>
        <m:Field name="PhoneRevision">0</m:Field>
    </m:Data>
</m:Data>
```

For more information about these new Revision ID fields, refer to the **Tracking Synchronization with Contact Revision IDs** topic in the **Luminate Online and Luminate CRM Integration Guide** (https://secure2.convio.net/customer/luminate_integration/v11/Help/Luminate_Integration_CSH.htm#1000).

Action Alert Email Message Referral Report Enhancements

Several new fields and filtering adjustments have been made to the Action Alert Email Message Referral Report. These changes improve its usability and help you to better track the success of advocacy campaigns. This feature is enabled automatically.

Changes to the report include:

New Columns have been added (and the defaults have changed):

- Alert ID
- Deliveries
- Failures

Two New Default Filters have been added:

- Action Alert ID
- Past 60 Days

Survey Groups

This release introduces the ability to automatically group Constituents based on how they answer survey questions. In addition, we have improved the survey security settings to allow center administrators to download and view the responses for their center only, without exposing it to Constituents.

Creating Survey Response Groups

You can now group Constituents based on how they answer survey questions enabling you to better segment and target your Constituent base. For example, you could add a survey question that asks Constituents what their role in an organization is. And then specify that all people who select "Communications Director" be added to a group that will be targeted for an email campaign.

Note: You can only add Constituents to a group if they are logged in when they complete the survey.

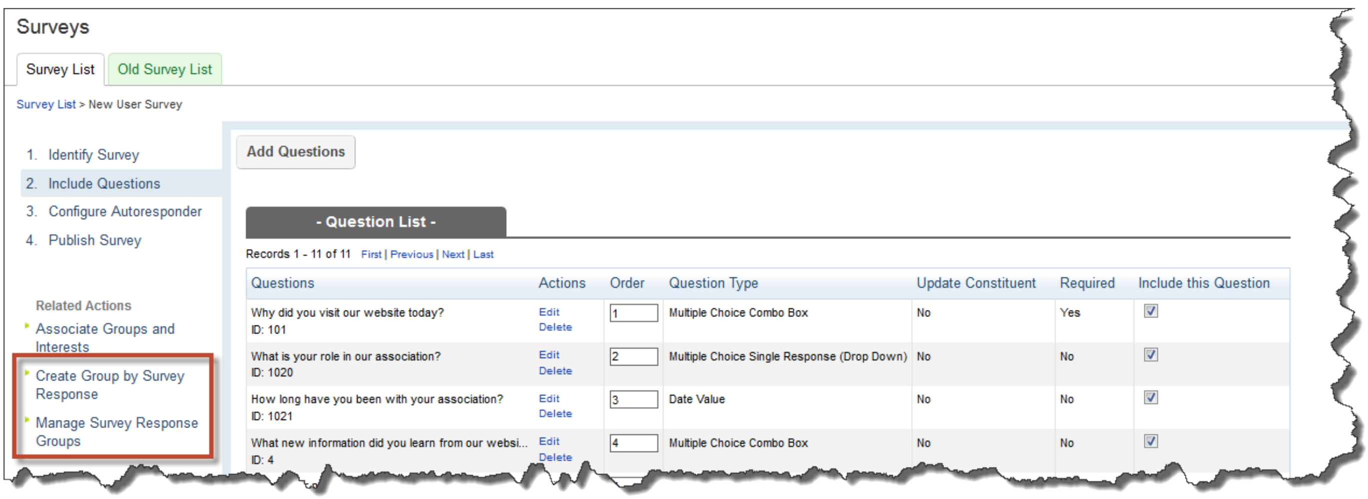
This feature includes:

- A new Related Action for defining group filters called **Create Group by Survey Response**
- A new Related Action for managing groups called **Manage Survey Response Groups**
- A new group type called **Survey Question Response Groups**

This feature is enable automatically.

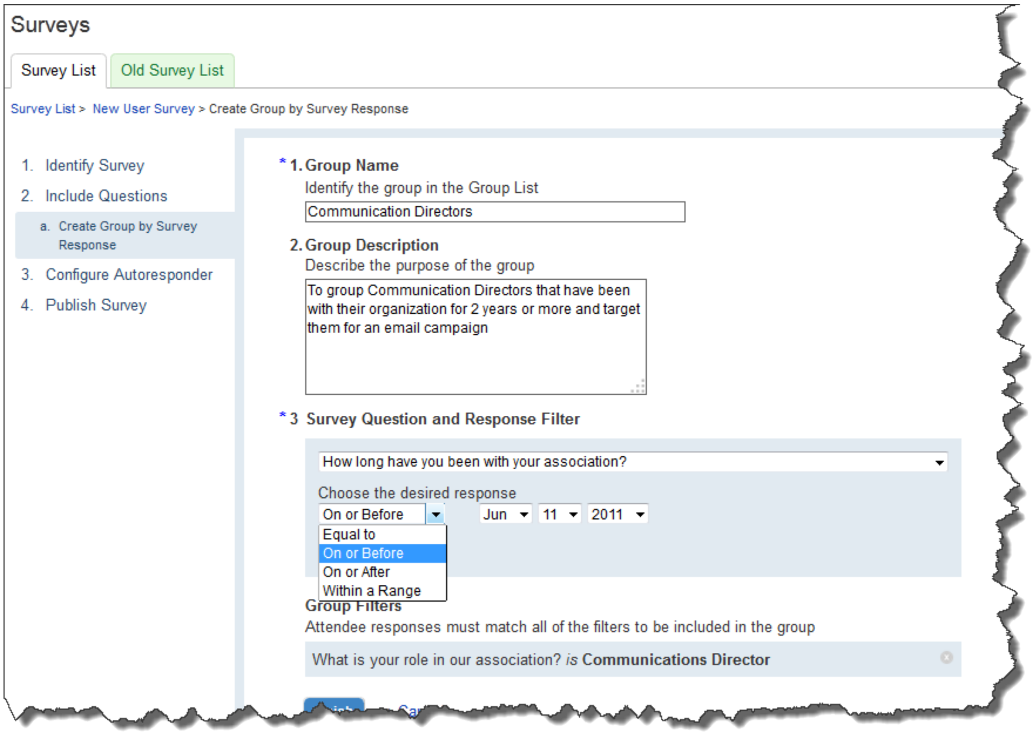
Two New Related Actions

When you click the **Include Questions** editing page, two new Related Actions, **Create Group by Survey Response** and **Manage Survey Response Groups**, display at the bottom of the left-hand column.



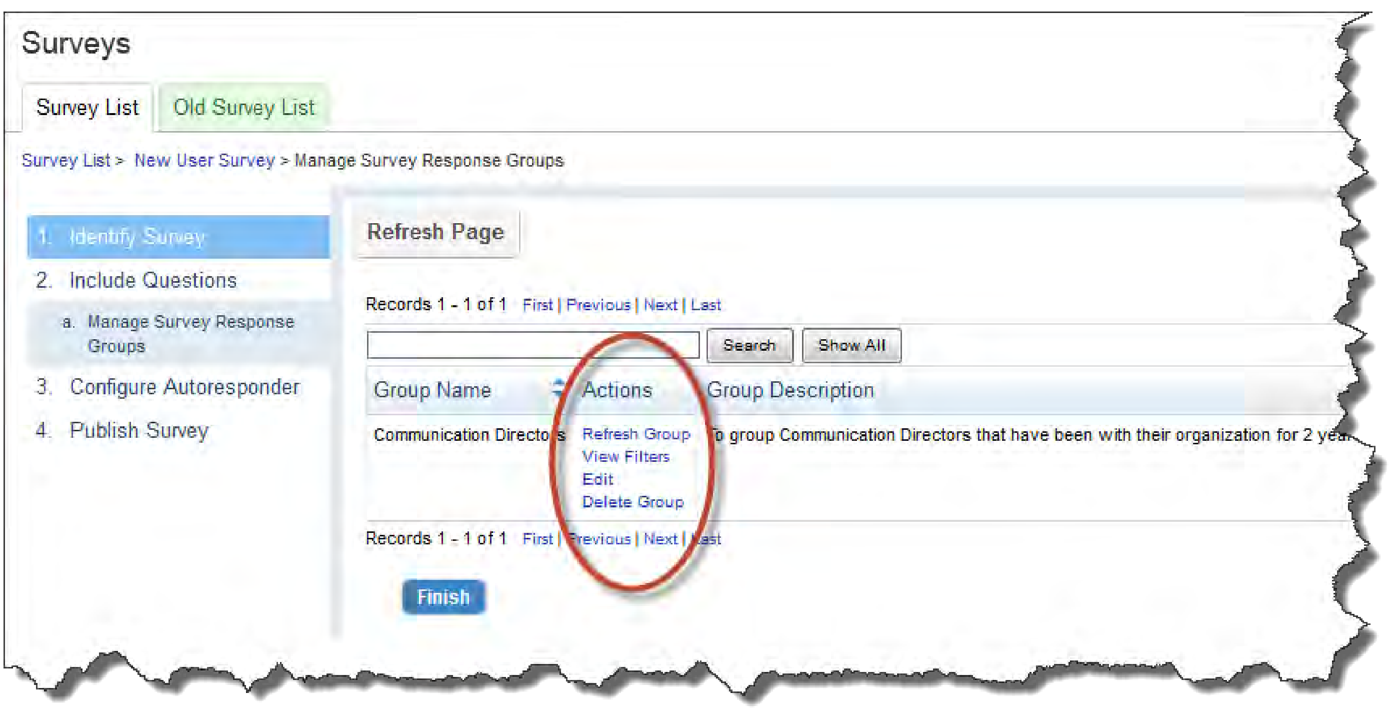
The New Create Group by Survey Response Editing Page

Click **Create Group by Survey Response** to open an editing page where you define the filters for a group: name the group and select a question and the desired answer. You can add more than one filter, but survey takers must match all the criteria to be included. The filters are listed at the bottom of the page.



The New Manage Survey Response Groups Editing Page

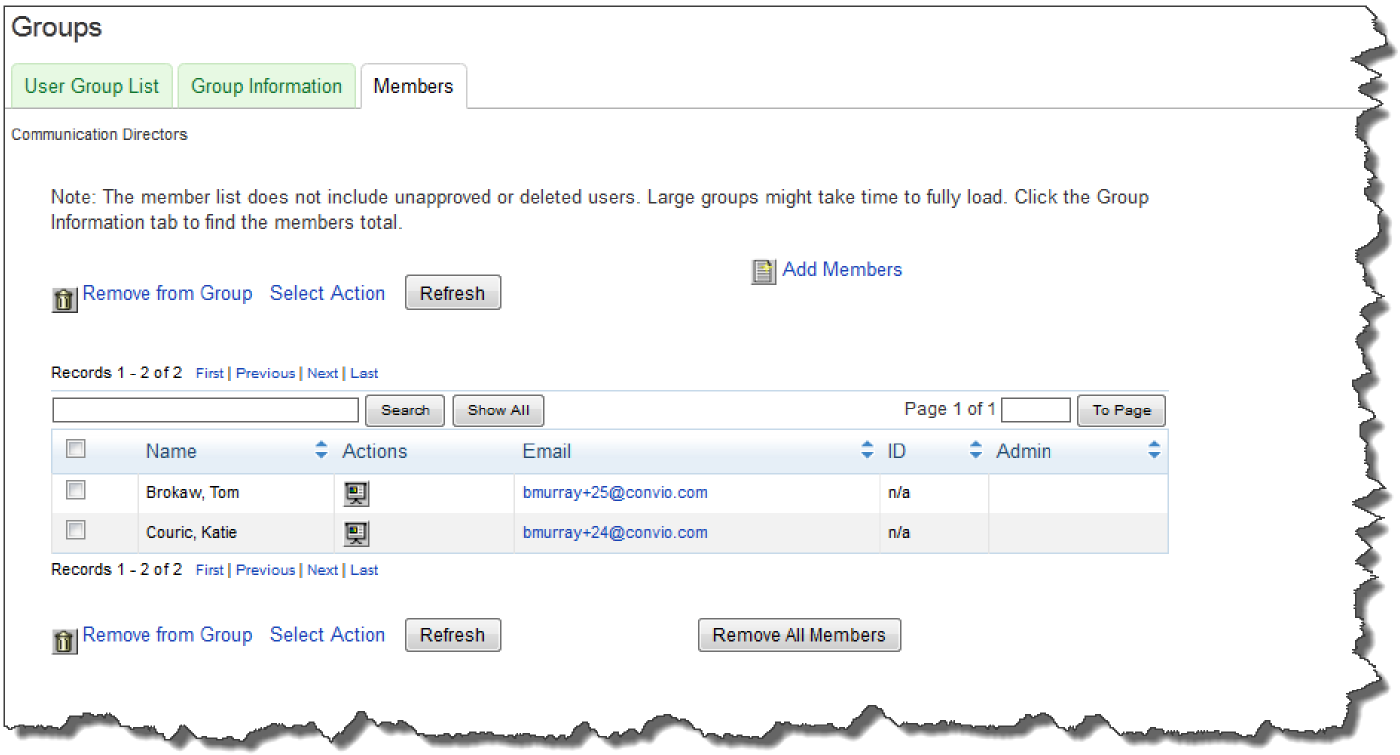
Click **Manage Survey Response Groups** to open an editing page where you can refresh the group, view the filters, and edit and delete the group.



Viewing the Group's Members

Survey Response Groups are a new group type and are treated like any other group. As such, you can view them by clicking **Constituent360 > Groups**. On the group list page, click **View Members** in the Actions column.

Note: New members are not automatically added to the group; you must refresh the group manually to see the members. See the procedure below to learn how to refresh the group.



To refresh group members:

When someone completes a survey, they are not automatically added to the response group. You must refresh the group in both the Survey Response Group editing page and the Groups editing page.

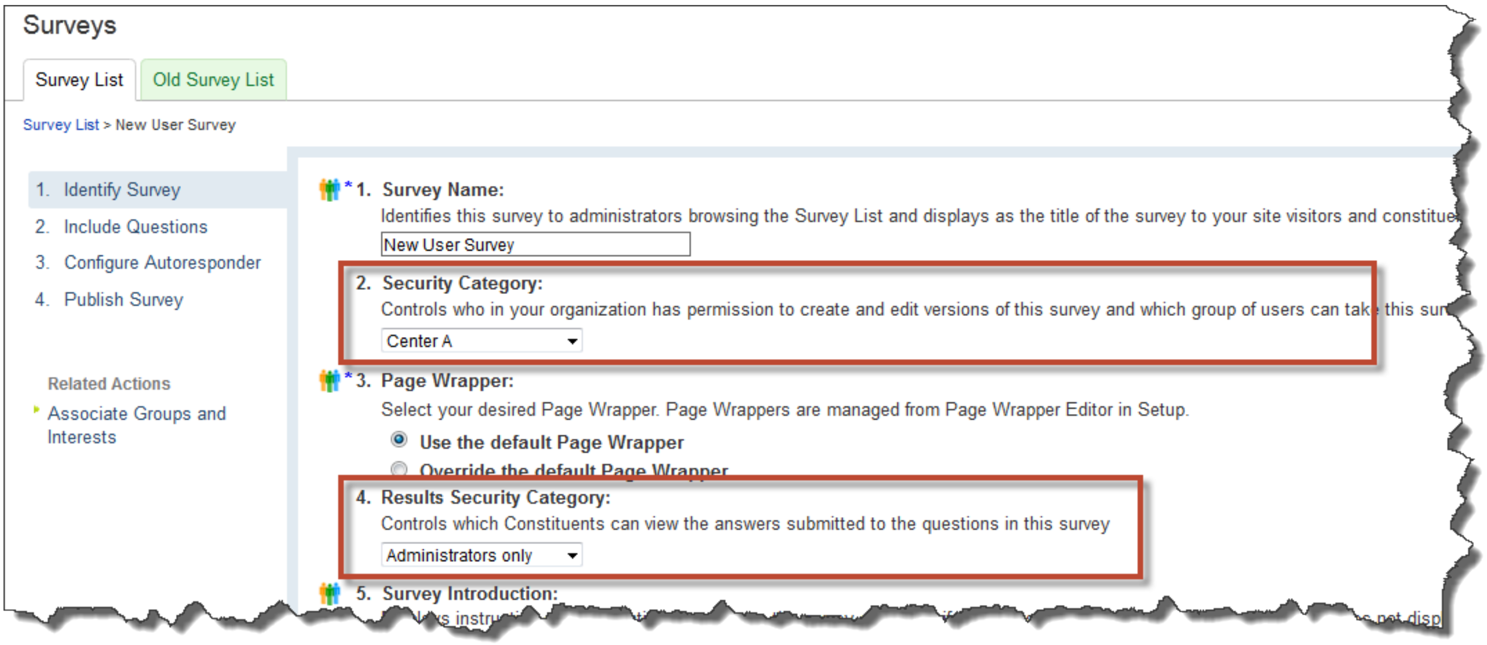
1. Click **Content > Surveys**. The survey list displays.
2. Click **Edit** in the Actions column for the appropriate survey. The editing pages display.
3. Click **Include Questions**.
4. Click **Manage Survey Response Groups** in the Related Actions section.
5. Click **Refresh Group** in the Actions column for the appropriate group. Now you need to also refresh the group in the **Groups** page.
6. Click **Constituent360 > Groups**. The Group List displays.
7. Click **View Members** in the Actions column for the appropriate group.
8. Click **Refresh**. The members display in the list.

Enhanced Survey Response Group Security

The permissions for viewing survey responses have been enhanced so that Center Administrators can download and view survey responses for their centers without making them visible to Constituents.

In the example below, the **Security Category** is set to the California Affiliate and the **Results Security Category** is set to Administrators Only. This ensures that Constituents in California will not be able to view survey responses.

This feature is enabled automatically.



TeamRaiser

Several enhancements were made to provide event administration and management task support.

An event manager group is now automatically created for each TeamRaiser event and the event managers are automatically added to this group as they are created.

On sites configured for Multiple Locale Support with several locales available:

- Event administrators can enable the Single Locale advanced event option to avoid displaying blank event pages to participants on pages without localized content. With this Single Locale option set, all page content will display in the default site locale even if localized content is present for some pages.
- Event managers can select a new locale filter in the Audience filters area while constructing a Coaching Email in Coaching Email Express to target the audience of the email towards a specific locale.

Event managers can now edit contact information in constituent records of participants either directly in the record or in registration or gift uploads.

Event administrators can place a Sponsorship Logo component on an event page. Then, event administrators and managers can upload and designate graphics-formatted image files containing logos as sponsorship logos to have them display in the component.

Event administrators can now select an option on all default and custom TeamRaiser pages to make them respond to the size of participant devices such as mobile phones and tablets.

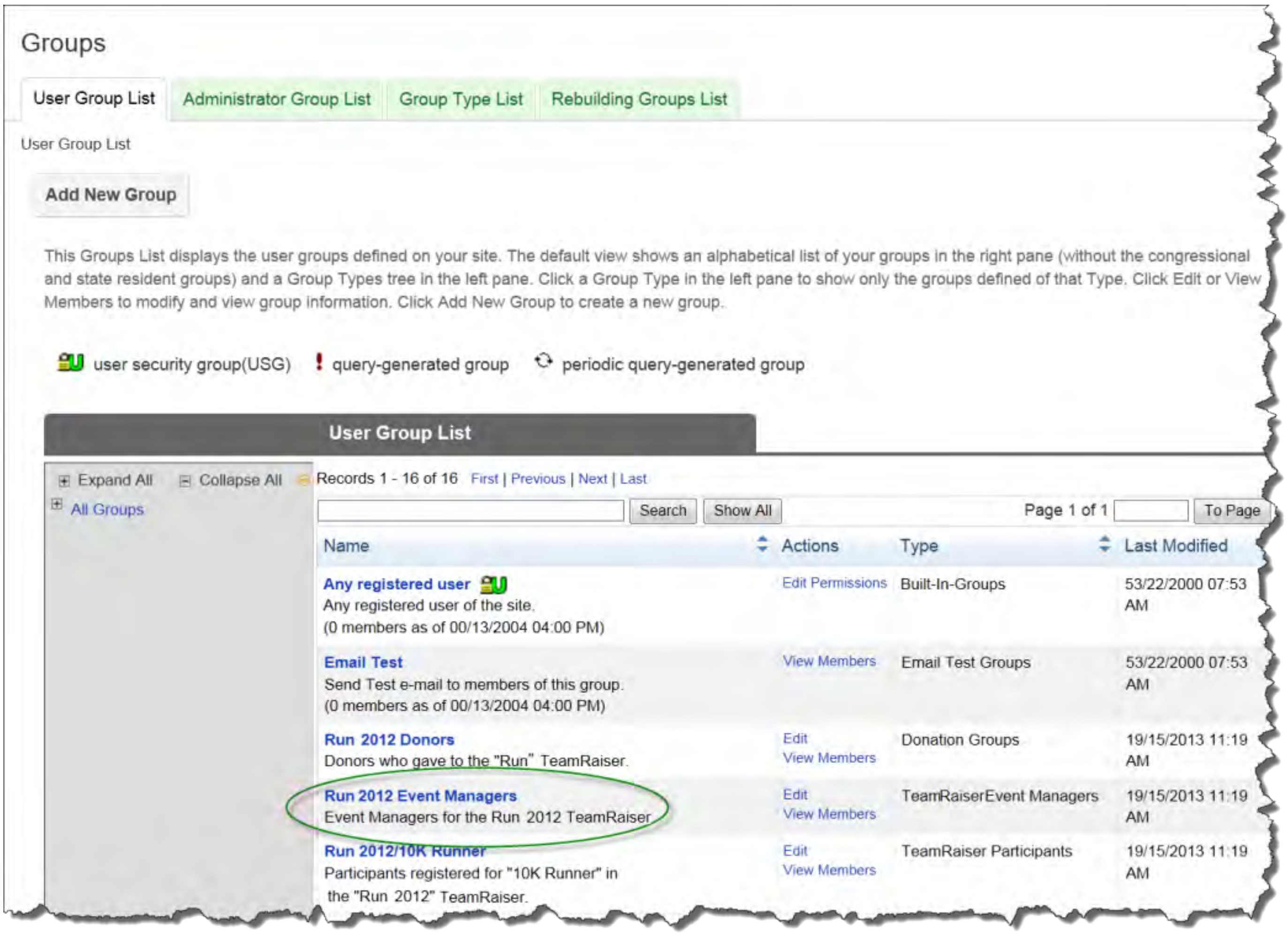
The Help for these new features will be available in Luminate Online 2013 V11.

Event Manager Groups

An event manager group is automatically created for each TeamRaiser event and event managers are automatically added to this group when they are created. If an event manager is removed from the system, their membership in the group is also removed.

This feature is available automatically when the F2F_ALLOW_EVENT_MANAGEMENT site option is enabled.

The event manager groups are added to the User Groups page (click **Constituent360 > Groups**).



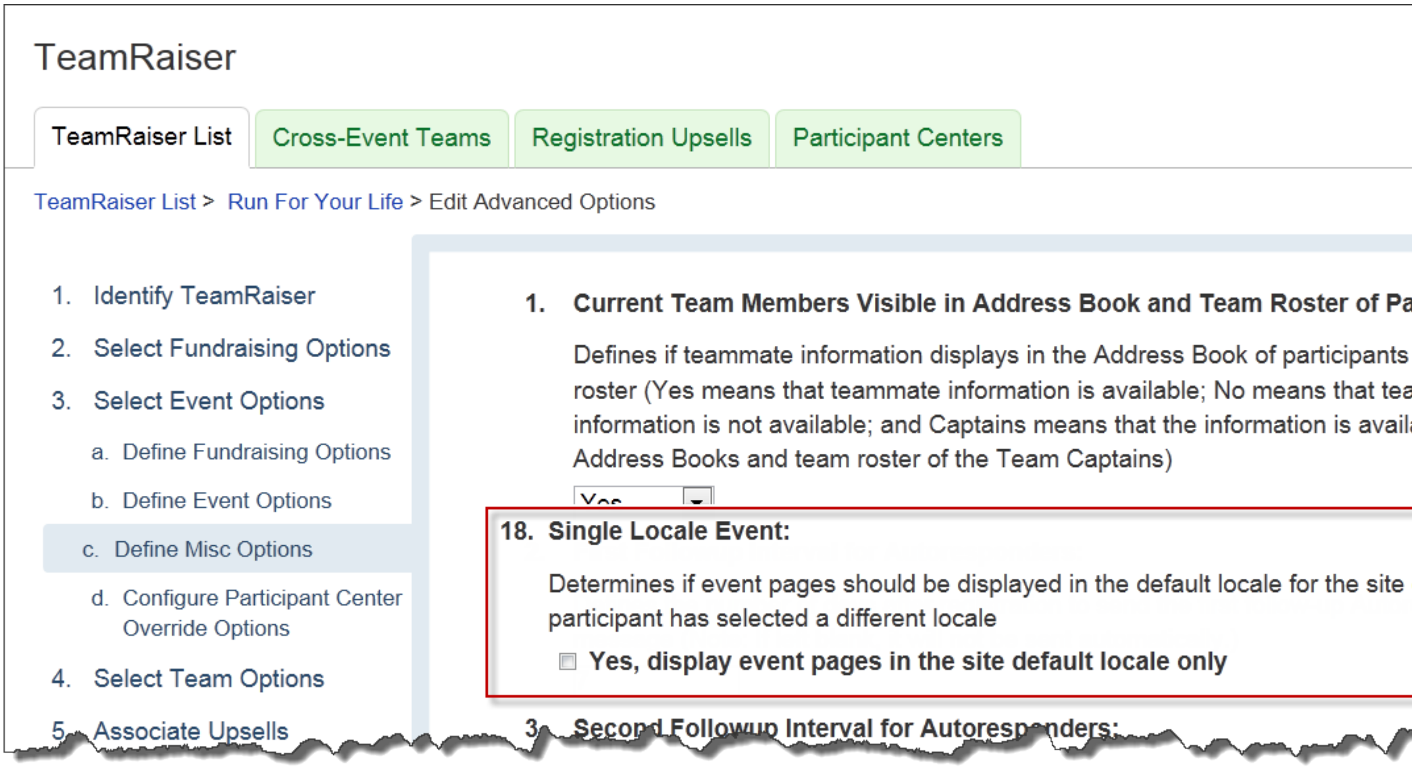
Single Locale Advanced Event Option

On a site configured for Multiple Locale Support that has several locales available, you can enable the Single Locale advanced event option to avoid displaying blank TeamRaiser event pages to your participants on pages without localized content. The page content will display in the default site locale.

The Single Locale event option is available in the TeamRaiser Advanced Event Miscellaneous Options on sites where the product configuration includes Multiple Locale Support.

To enable the Single Locale advanced event option:

1. From the TeamRaisers list page, click **Edit** from the Actions column of the appropriate event.
2. From the options along the left, click **Select Event Options**.
3. From the Related Actions section on the Event Options page, click **Edit Advanced Options**.
4. From the options along the left, click **Define Misc Options**.
5. Scroll to the bottom of the page to the Single Locale Event option and click the **Yes** checkbox.



6. Click **Save**.

Coaching Email Locale Audience Filter

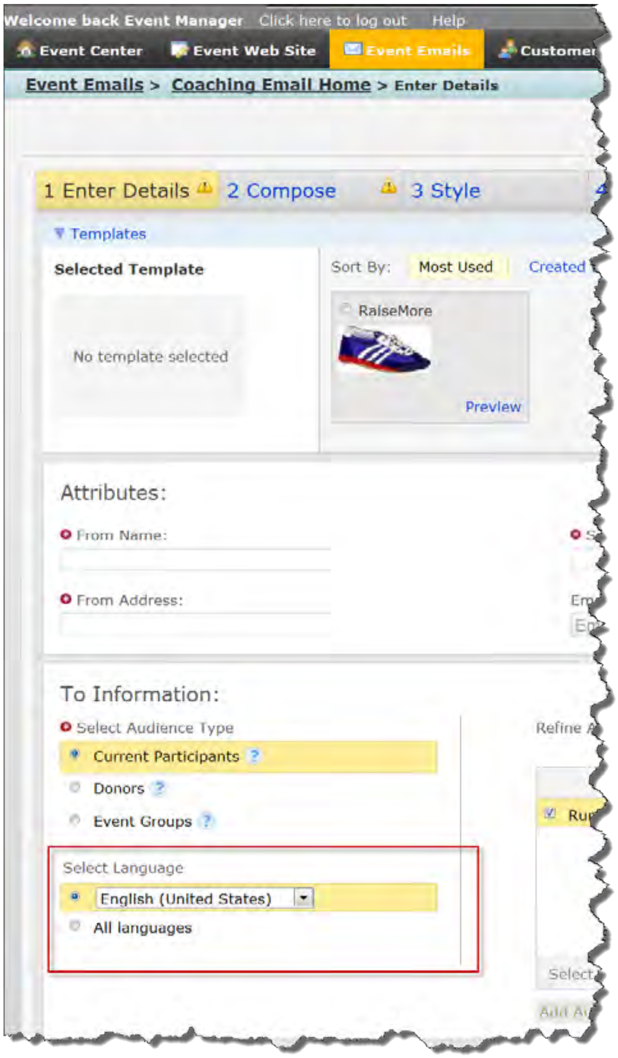
A new filter is available while constructing a Coaching Email in Coaching Email Express in the Audience filters area to target the audience of the email towards a specific locale.

The new filter is automatically available in a site with Multiple Language Locales enabled and Coaching Email Express.

To access the Coaching Email filter on the Create Email page:

1. From the tabs along the top of the Event Management Center, click **Event Emails**.
2. From the Related Actions on the Event Emails page, click **Send Coaching Emails**.
3. On the Coaching Email Home page, click the **Create New Email** button.

4. After selecting the template and supplying the attributes information, scroll to the To Information section where the audience selection filters reside.



Single Locale Advanced Event Option

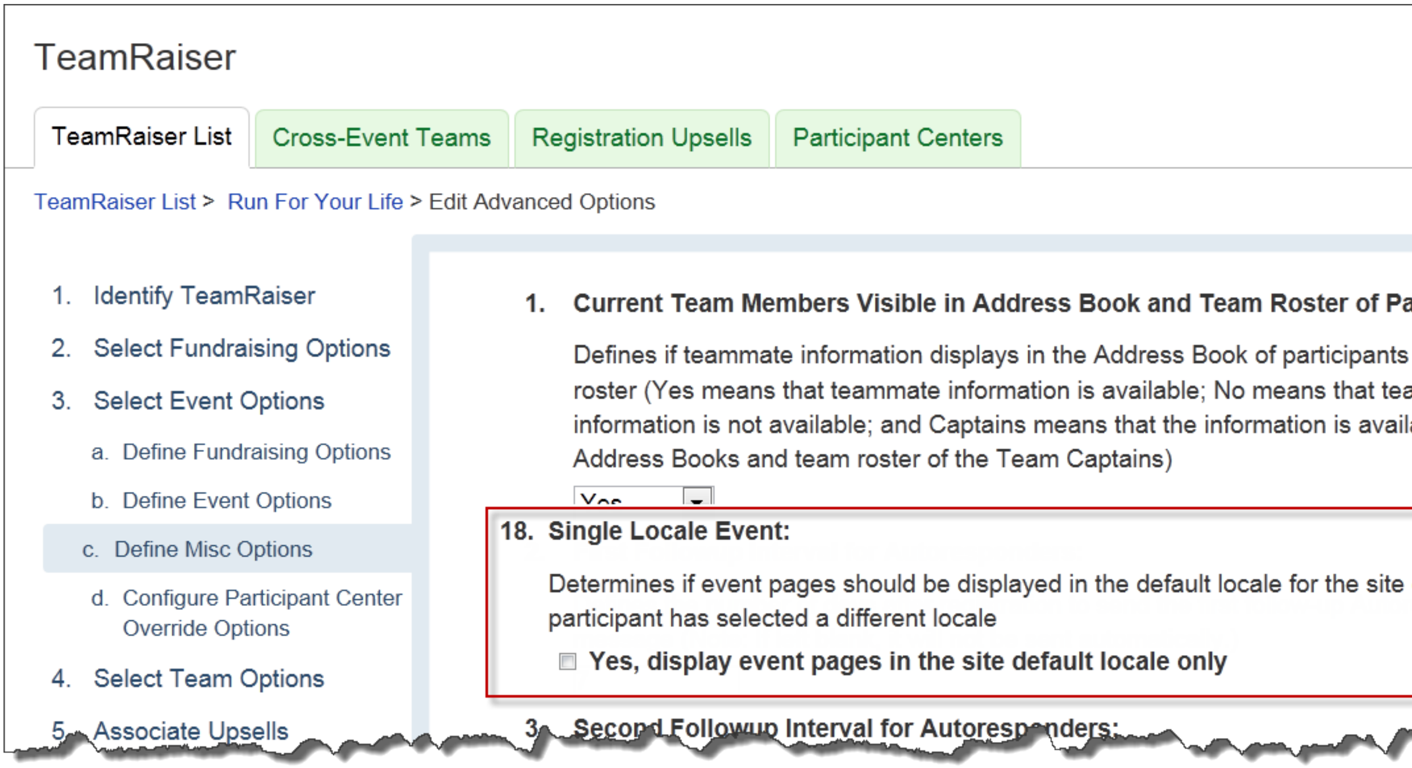
On a site configured for Multiple Locale Support that has several locales available, you can enable the Single Locale advanced event option to avoid displaying blank TeamRaiser event pages to your participants on pages without localized content. The page content will display in the default site locale.

The Single Locale event option is available in the TeamRaiser Advanced Event Miscellaneous Options on sites where the product configuration includes Multiple Locale Support.

To enable the Single Locale advanced event option:

1. From the TeamRaisers list page, click **Edit** from the Actions column of the appropriate event.
2. From the options along the left, click **Select Event Options**.
3. From the Related Actions section on the Event Options page, click **Edit Advanced Options**.

4. From the options along the left, click **Define Misc Options**.
5. Scroll to the bottom of the page to the Single Locale Event option and click the **Yes** checkbox.



6. Click **Save**.

Constituent Information Edits from the Event Management Center

Event managers can now update constituent information manually or through uploads from their Event Management.

Manually Editing Constituent Record Information

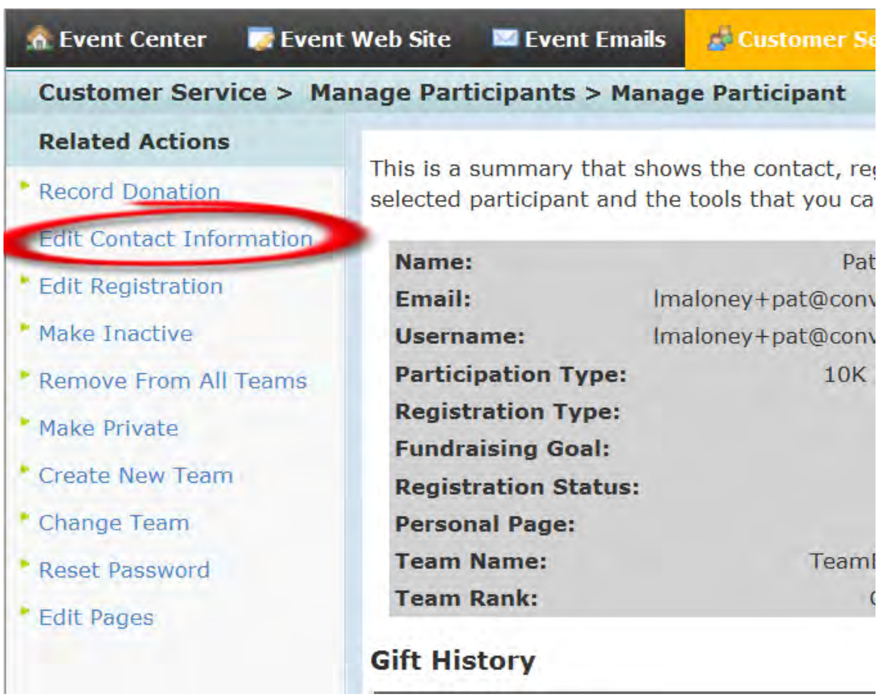
Edit Contact Information is a new Related Action available from the Manage Participant page in the Customer Service area of the Event Management Center. After selecting to Manage Participant, you can modify the:

- Full name (Title, First, Middle, Last, Suffix, and so on)
- Birth date
- Employer
- Language preferred
- Occupation
- Phone number
- Residential/postal address

The Edit Contact Information related action is automatically available on the Manage Participant page in the Event Management Center when Multiple Language Support is enabled on the site and the database configuration allows users to see and work with the Preferred Locale fields.

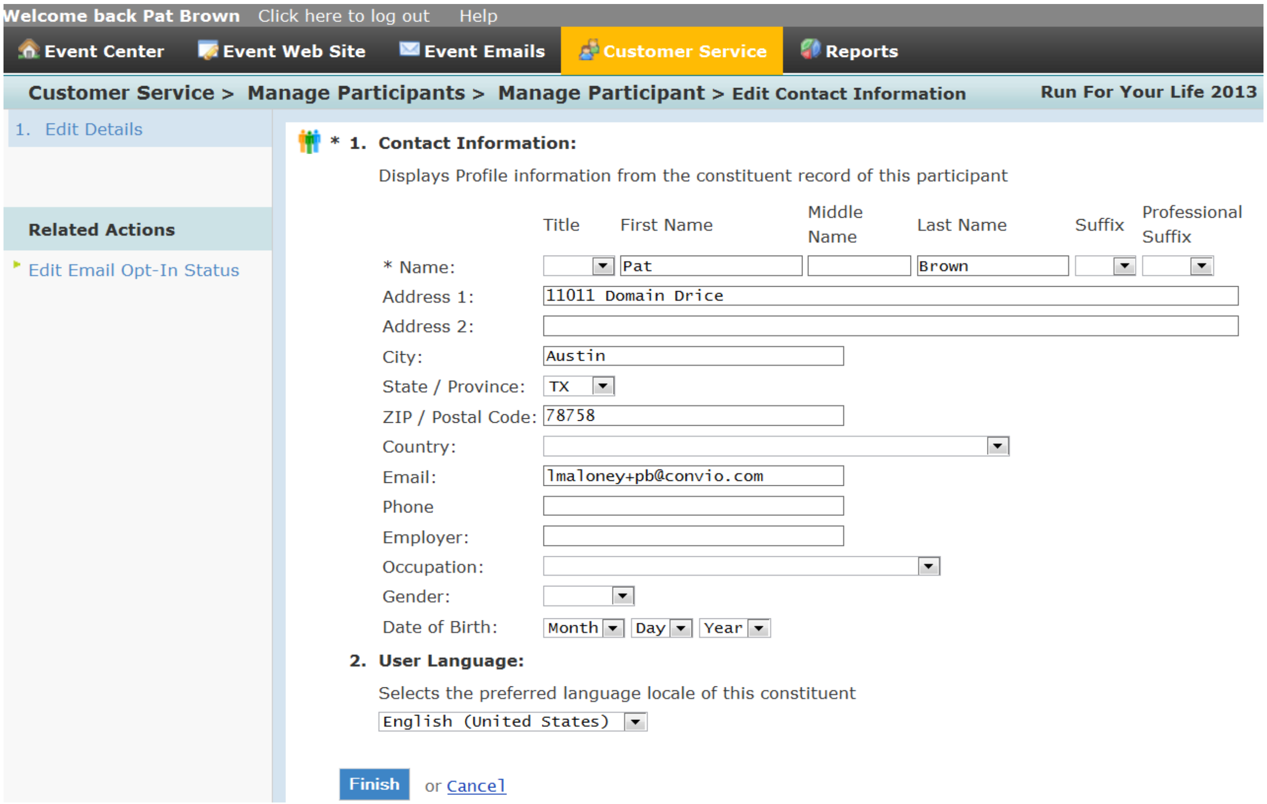
▸ To edit the contact biographical and contact information of a participant:

1. Log into the Event Management Center.
2. From the options along the top of the page, click **Customer Service**.
3. From the options along the left on the Customer Service page, click **Manage Participants**.
4. If the participant is not in view in the list of participants displayed:
   a. Click **Search for Participants**.
   b. In the Participants Details page, enter as much identifying information as you know and click **Finish**.
5. Locate the appropriate participant and click **Manage Participant** from the Actions column.
6. From the Related Actions on the Manage Participant page, click **Edit Contact Information**.



7. On the **Edit Information** page, make modifications to the contact information or the user language locale

and then click **Finish**.



Updating Constituent Records Through Registration Uploads

The Existing Contact Record Updates Allowed option has been added to the Registration Uploads tasks in the Event Manager Center. When you select this option, information from the uploaded file will be added to the corresponding field in the constituent record.

The Existing Contact Record Updates Allowed option is available automatically in the Uploads page, but use of the feature depends on the permissions assigned to each event manager.

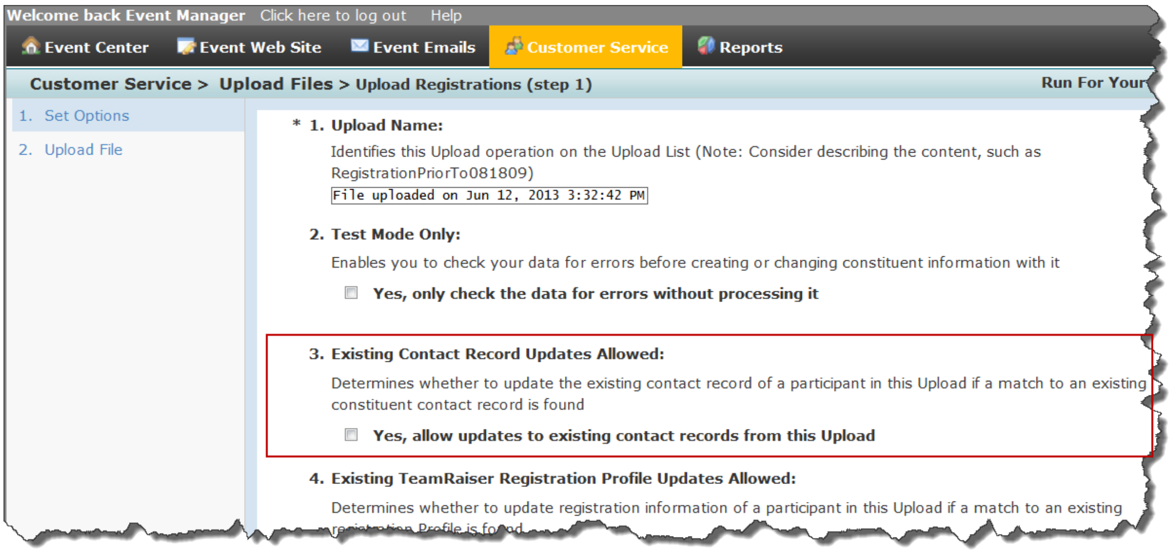
▸ To update a constituent record from an upload file:

1. From the options along the top of an Event Management Center page, click **Customer Service**.
2. From Related Actions on the Customer Service task page, click **Upload Files**.
3. From Related Actions on the Uploads page, click **Upload Registrations**.
4. On the Set Options page, for:
   a. **Upload Name,** enter a word or phrase that describes the purpose of this upload. If left blank, the system uses the date and time timestamp when the upload is scheduled as its name.
   b. **Participation Type**, click the appropriate option from the drop-down list.
   c. **Test Mode Only**, be sure the checkbox does not contain a checkmark if this is the actual upload process.
   d. **(NEW) Existing Contact Record Updates Allowed**, click the checkbox to add a checkmark if the file

contains existing constituents whose constituent records can be updated by the information in this upload file.

e. **Existing TeamRaiser Registration Profile Updates Allowed**, click the checkbox to add a checkmark if the file contains existing participants whose event registration records can be updated by the information in this upload file.

f. **Address Matching Criteria**, optionally click the appropriate checkboxes to determine the information that the system should use to determine if the upload file information matches a constituent record that exists in the database.



5. Click **Next**.
6. On the Upload File page, click the **Browse** button, navigate to the upload file, and click the **Open** button.
7. Click the **Preview** button to load the file into a small area that will open on the page.
8. Click **Finish**.

TeamRaiser Sponsorship Logos

Event administrators can place a Sponsorship Logo component on an event page to display uploaded logos for event sponsors. Event administrators and managers can upload and designate graphics-formatted image files containing logos as sponsorship logos to have them display in the component.

Inserting the Sponsorship Logo Component on an Event Page

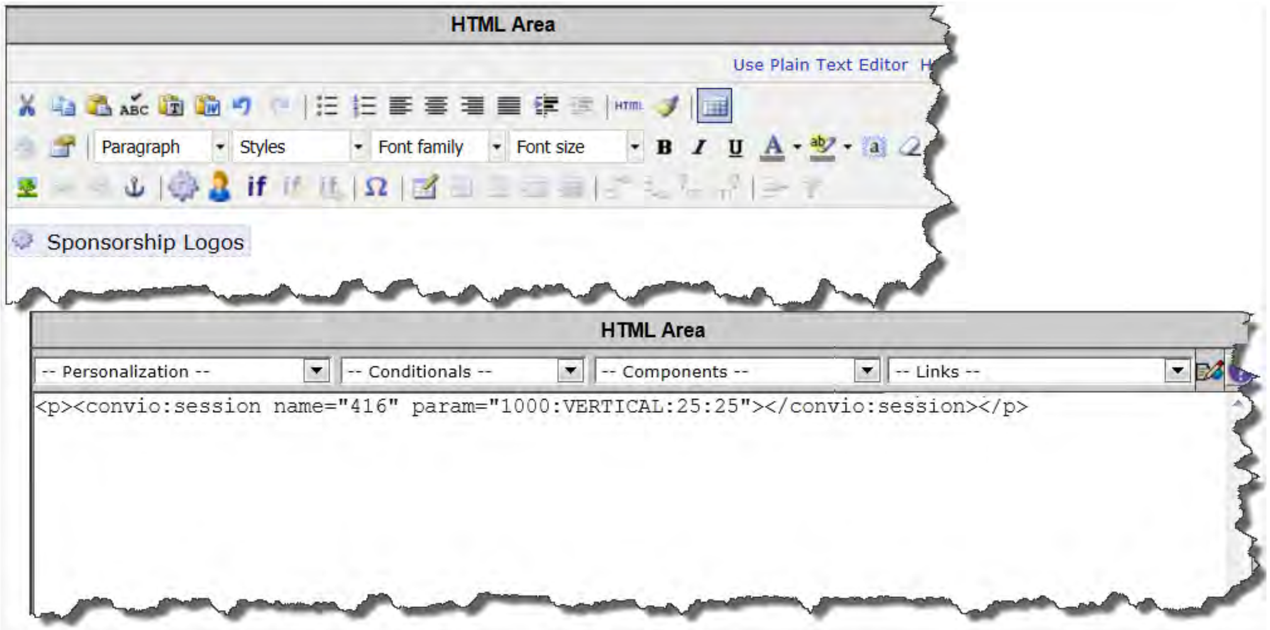
You can determine how you want the logos to display on a page in a:

- Vertical list down the page
- Horizontal list across the page (which may not be optimal as the page may stretch too far to the right if you have more than a few logos to display)
- Slide show where each logo displays individually for 3000 milliseconds by default in a rotating fashion

The logos will display in order alphabetically by the logo title. To display the logos in a specific order, you can prefix the titles with a numbering sequence.

You can define the maximum height and width of the logo display area. The system will automatically scale images larger than this size to the correct proportions for display. However, images smaller than the size will display at their uploaded size.

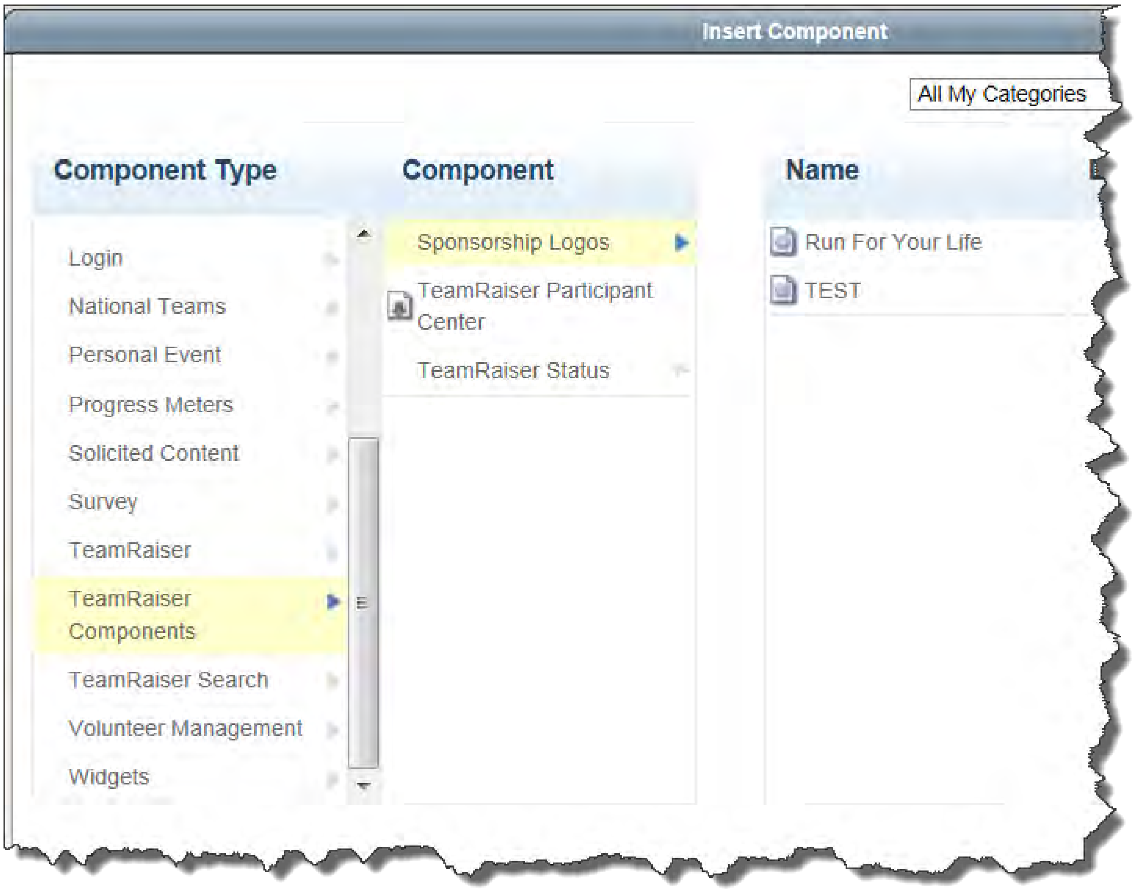
The Sponsorship Logo component displays with its name in the HTML side of the content editor and is embedded as the S416 session tag on the source (or plain text) side.



The Sponsorship Logo component is available automatically in the content editors as a TeamRaiser Component or S416 session tag.

To place the Sponsorship Logo component on an event page:

1. From the TeamRaisers list page, click **Edit** from the Actions column of the appropriate event.
2. From the options along the left, click **Customize Pages**.
3. From the page list, click **Configure** from the Greeting page (or the preferred page for the logos.)
4. In the HTML Area Content Editor, type a statement to lead into the component and then place the cursor where you want to insert the component.
5. From the editor toolbar, click the Components utility.
6. In the Insert Component pop-up, click **TeamRaiser Component > Sponsorship Logos >** *name of the event*.



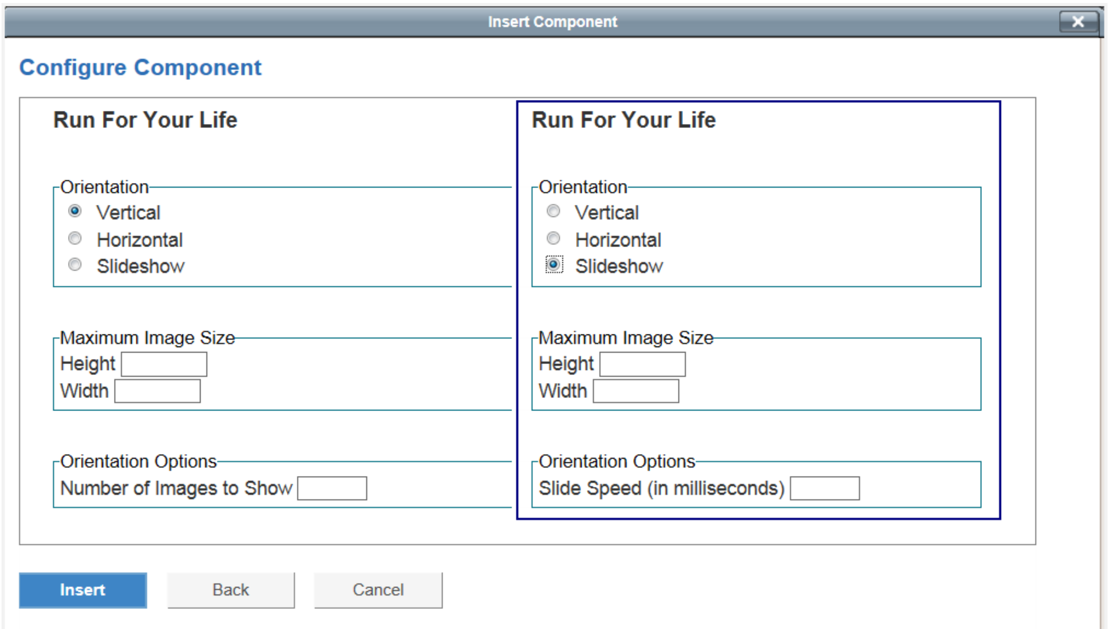
7. In the Configure Component pop-up, to set up the logos to display in a:
   - Line down the page:
     a. For **Orientation**, leave the **Vertical** option selected.
     b. For **Maximum Image Size**, enter the number of pixels to define specific size area in which to fit the logos.
     c. For **Orientation Options**, to restrict the amount of the page that the logo list will take up, enter the appropriate number in **Number of Images to Show**.
     d. Click **Insert**.
   - Line across the page:
     a. For **Orientation**, click the **Horizontal** option selected.
     b. For **Maximum Image Size**, enter the number of pixels to define specific size area in which to fit the logos.
     c. For **Orientation Options**, to restrict the amount of the page that the logo list will take up, enter the appropriate number in **Number of Images to Show**.
     d. Click **Insert**.
   - Slide show in one spot:

a. For **Orientation**, click the **Slideshow** option.

b. For **Maximum Image Size**, enter the number of pixels to define specific size area in which to fit the logos.

c. For **Orientation Options**, enter the appropriate number of milliseconds as the interval for showing each logo in the Slide Speed to change from the default 3000 millisecond.

d. Click **Insert**.



8. To make sure the component displays correctly in content, click **Preview** and examine the information in the small preview window that opens in the upper left.

9. If the information is not the data you were expecting, close the preview window, enter a different component, and preview it again.

10. Click **Finish**.

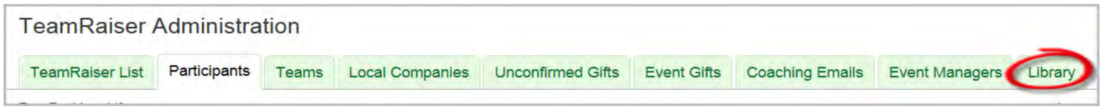
Uploading Sponsorship Logos to the Event Library

You can upload and store graphics-formatted files into the Event Library within a TeamRaiser event and designate them as Sponsorship logos to display in the Sponsorship Logo component embedded on event pages.

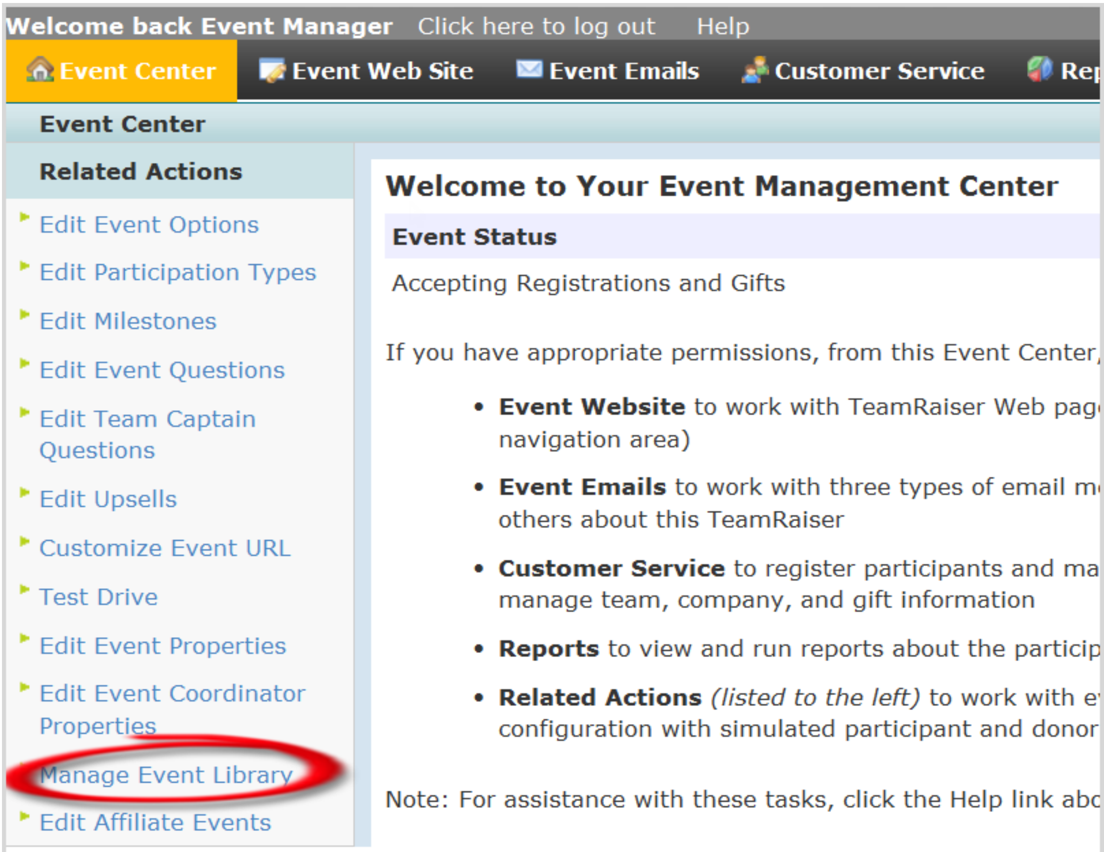
To upload a sponsorship logo to the Event Library:

1. To log in as an:
   - Administrator:
     a. From the top of any page, click **Fundraising > TeamRaiser**.
     b. In the TeamRaisers list, click **Manage** from the Actions column of the appropriate TeamRaiser event.

c. On the Find Participants page, click the **Library** tab.



- An Event Manager, click **Manage Event Library** from the options on the Event Center page.



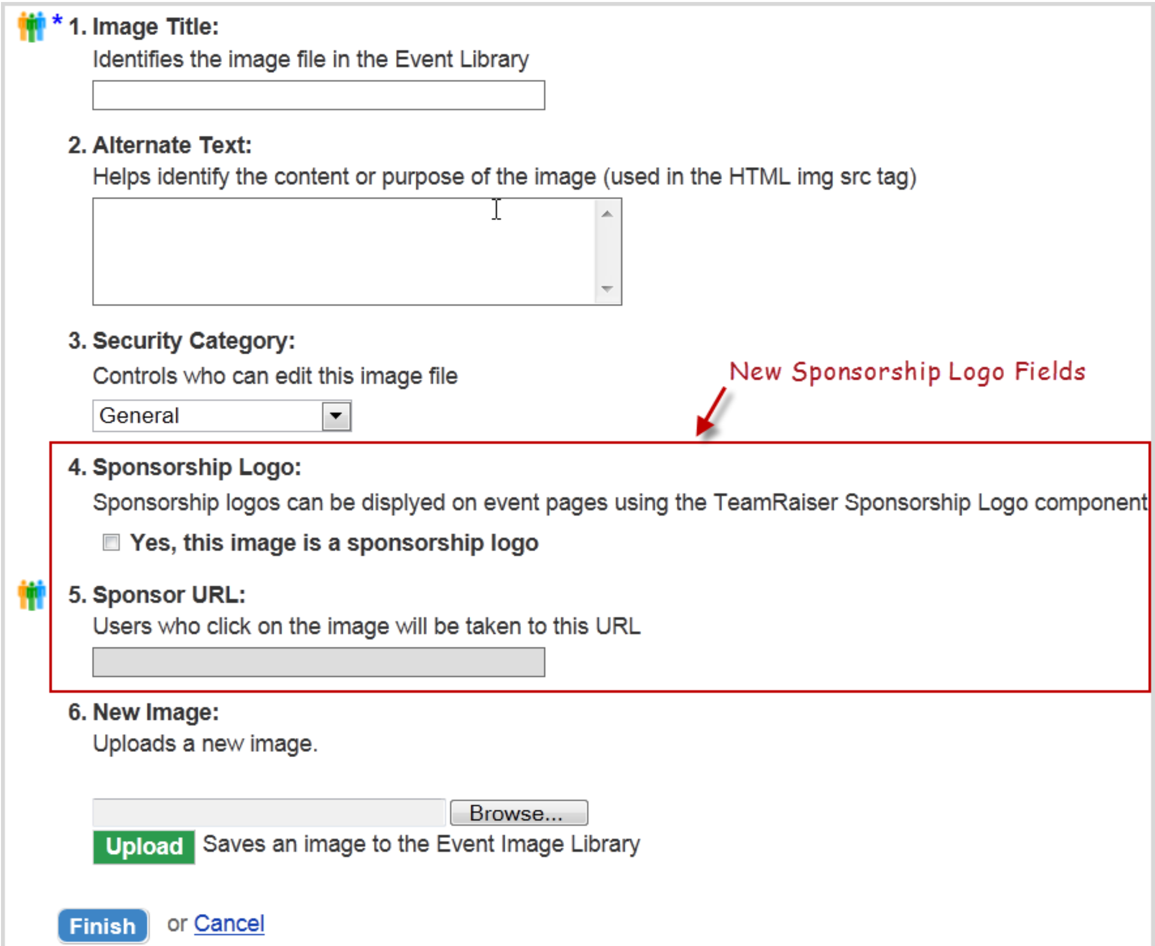
2. On the Documents List page, click the **Images List** tab.
3. On the Images List page, click **Upload New Image**.
4. On the Upload Image page:
   a. For **Image Title**, enter the name of the image to help identify it in lists.

   Note: Sponsorship logos are sorted alphabetically for display by this title. To display the logos in a specific order, c Consider adding a numeric prefix to the titles.

   b. For **Alternate Text**, enter a phrase that describes the logo when the mouse hovers over the logo. If left blank, the system uses the Image Title.
   c. For **Security Category** (*Administrators only*), select which group can edit the details and replace this image.
   d. For **Sponsorship Logo**, click the **Yes** check box.
   e. For **Sponsor URL**, enter the path to the home page of the sponsor (or the page the sponsor prefers)

to display when the logo is clicked.

f. For **New Image**, click **Browse** to locate and **Open** the file containing the image, and then click **Upload**.



5. Click **Finish**.

TeamRaiser Performance by Events and by Security Category Report Enhancements

Several new columns are available in the TeamRaiser Performance by Events and by Security Category.

Column Name	Column Group	Description
Fundraisers	Gifts By Donor	Number of participants raising money by collecting donations (not including registration fees paid for the event)
Average Offline Gift	Gifts by Status	Monetary amount representing the average monetary amount of an unconfirmed and confirmed gift recorded into the system offline

Column Name	Column Group	Description
Average Online Gift	Gifts by Status	Monetary amount representing the average monetary amount of a gift made through an online donation form
Average Team Size	Registration Summary	Average number of participants registered on one team
Personal Pages with Custom URL	Registration Summary	Number of Personal Pages where the participant set the URL to a custom setting
Team Pages with Custom URL	Registration Summary	Number of Team Pages where the Team Captain set the URL to a custom setting

Responsive Layouts for Default TeamRaiser Pages

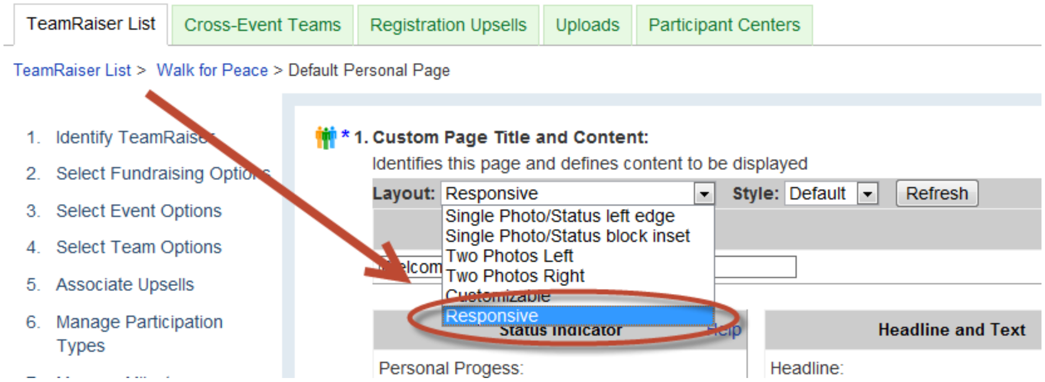
TeamRaiser event participants can now view more default and custom pages from their personal computers, tablets, and smartphones. When you design event pages, you can select an option to adjust them to the size of participant devices. Previously, the option was only available for TeamRaiser registration pages.

Responsive now appears as an option in the **Layout** field when you customize these pages:

- Default Personal
- Company List
- Default Company
- Team List
- Default Team
- Top Participants List
- National Company
- Custom

To configure TeamRaiser pages with the responsive layout

1. From the TeamRaisers list, click **Edit** from the **Actions** column of the appropriate TeamRaiser event. The Identify TeamRaiser Details page appears with the configuration task list.
2. Click **Customize Pages**. The TeamRaiser pages list appears.
3. Click **Configure** from the **Actions** column for the appropriate page. The edit page appears.
4. In the **Layout** field, select **Responsive**.



5. Click **Finish**.