What's new in V8

EASYSITE

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Document Control

| Version	By	Date	Regarding
1.0	Andrew Wall	12/07/2018	Document creation

Contents

Overview

This document contains a list of new features and changes that have been implemented in Easysite 8.0.

Administration Menu

The administration menu has had a major face lift in this version of Easysite. When logging into the backstage area for the first time you will notice that the menu is not shown immediately. To view the menu, click on the hamburger image (three horizontal lines), this will bring it into view.
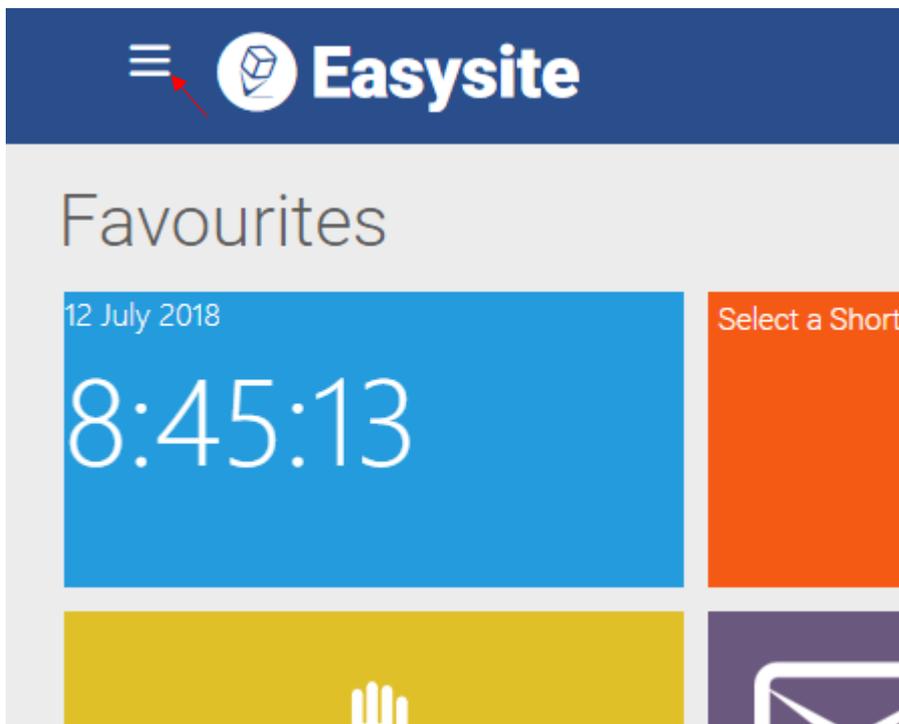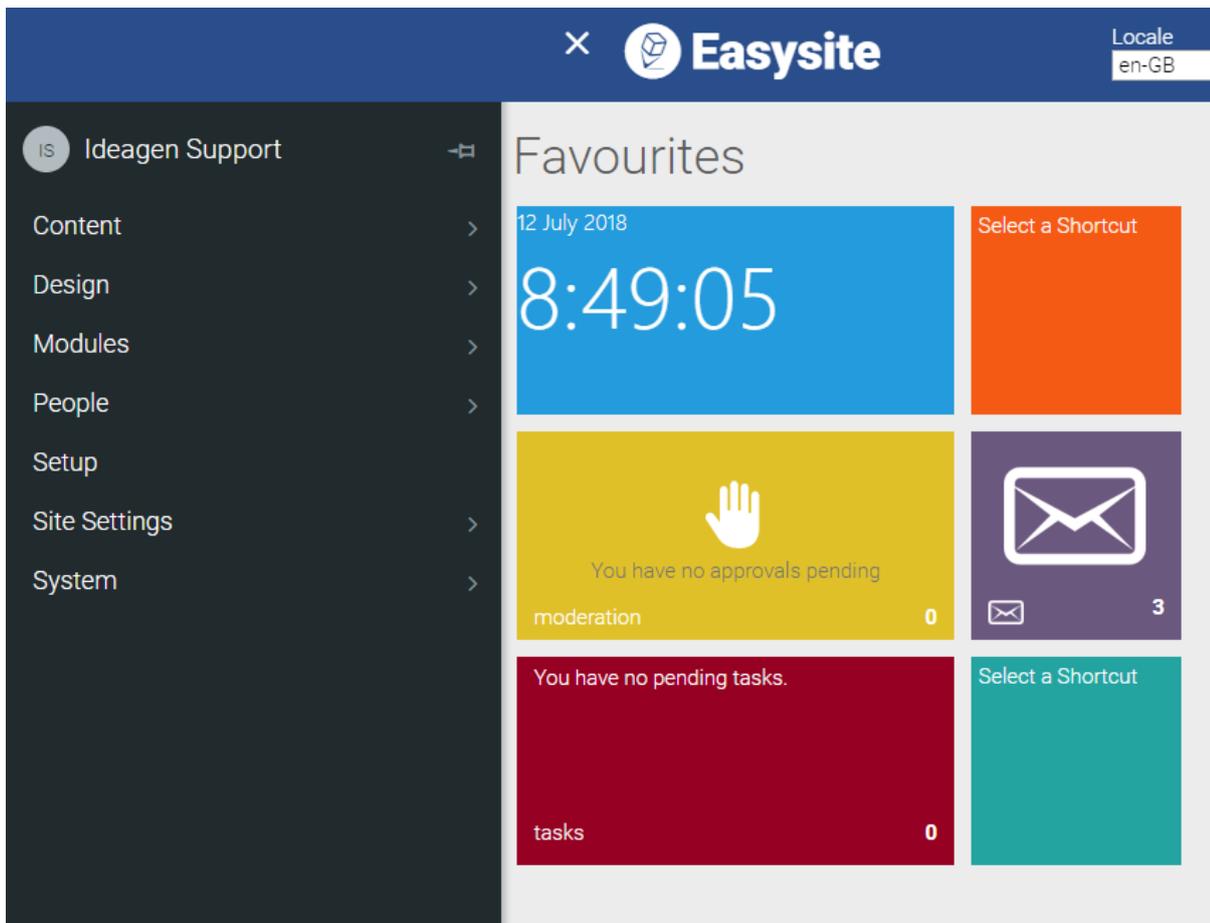
The menu has been laid out in the hope it is a little easier to use, less obtrusive as well as giving a better overall user experience.

A few commonly used feature can now be found in the following locations:

Assets
Content **>** Assets

Templates
Design **>** Templates

Users
People **>** Users

Groups
People **>** Groups

Forms
Modules **>** Communication>Forms

Template

Sections

Another addition for this version of Easysite is the ability to define template sections. This means you can create parts for templates which you use frequently such as a header for a page only once and assign these to multiple templates or pages.

Template sections can be accessed by going to the Templates overview page and then selecting the "Sections" item under the options menu, this will lead you through to the sections overview where you can see a list of all the existing sections within your installation. The information here includes the title, the icon for the section, how many times the section has been used, either on a page or on a template. In the rightmost column there is a checkbox which can be used to select a section to delete it.
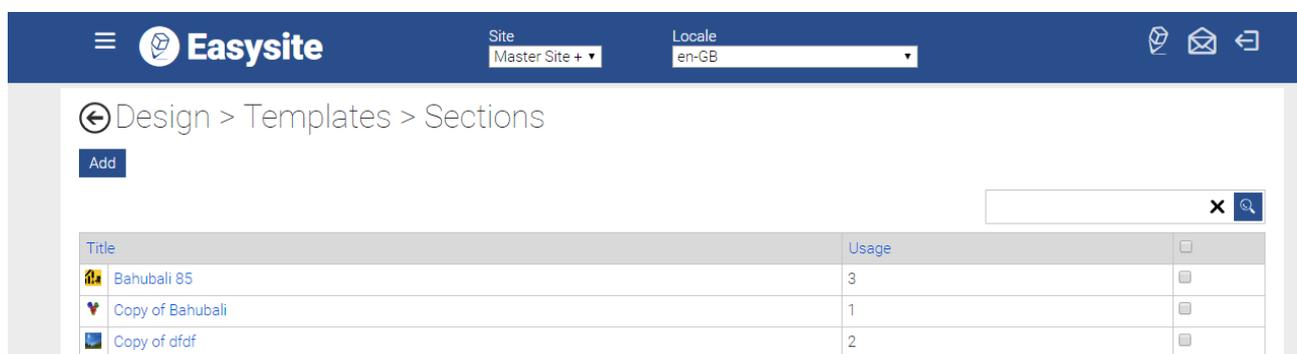

Deletion of a section item can be done by selecting the row, as described above, and then clicking the delete button at the bottom of the page. You will be presented with a confirmation window to ensure that the correct item is being deleted, once that has been confirmed then the section will be removed. If the section is currently assigned to a page or template deleting it will not remove the controls on the page but it will default the configuration of that section back to empty.

Clicking on add or on a section title on the overview page will take you through to the section details. When adding a new section, you will have the ability to set the general details of the section and the actual content, when viewing an existing section this information will be pre-filled and you will also be able to access the activity log.

The general tab presents the basic data such as title, description and then the avatar icon for the section. The layout tab allows you to add, amend or remove elements from the section using the standard template designer layout and on the activity tab you can see a full list of the log entries relating to this section.
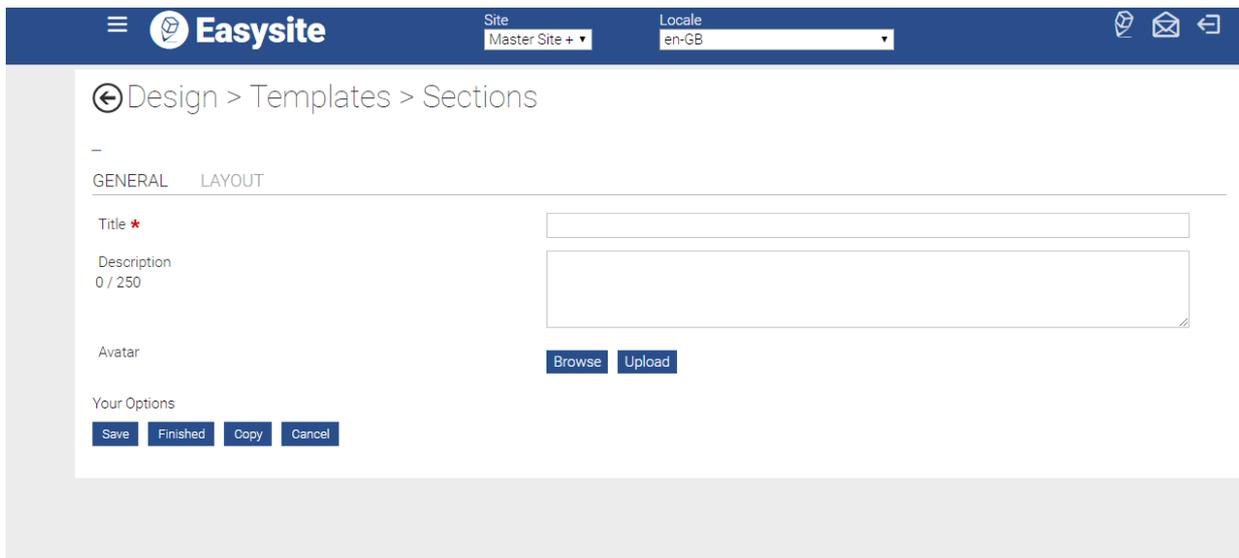
To place a section onto a page or a template you will need to use the new Section Container, which can be found under the layout tab of the elements section when editing a page or template. Once the control has been added to the page you will be presented with the configuration where you can select the section you wish to use and give the container a friendly name.
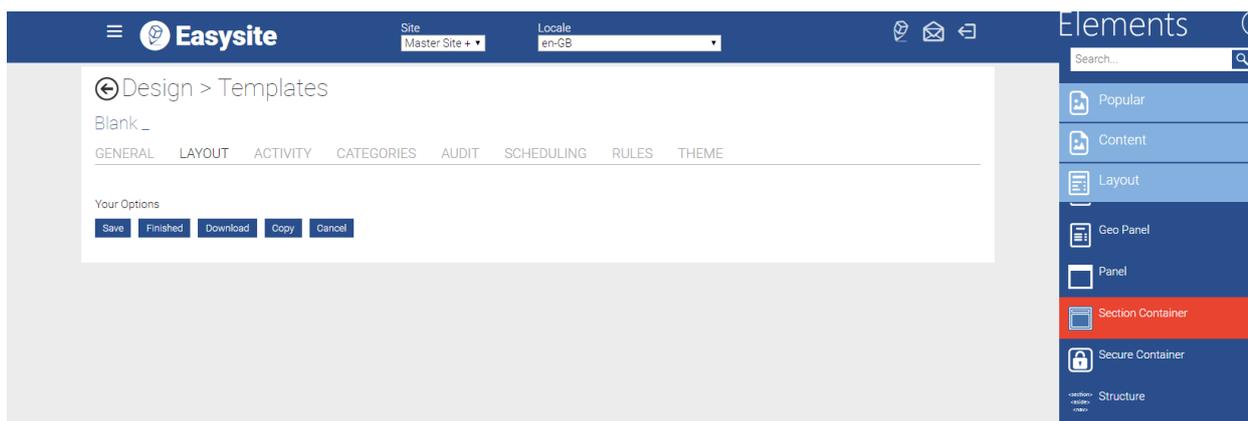
Template Association

Another aspects of pages and templates which has been updated in this version is the association between pages and templates. This has been made more formal and a page will always now be associated with a template.

There are a couple of rules which will be followed to maintain this relationship. If a page is the only page associated to a template, making changes to the template or the page will update either one, if the page is associated to a template which is associated with multiple other pages and changes are made to the page, a new template will be created and associated with the page.

This will also include any existing pages which are not currently associated to a template when they are saved they will be associated with either an existing template if they match or a new template will be created if not. When checking for a match there are a few controls which will not be used to determine the similarity, this includes anything within the section container.

GDPR

As part of the recent changes to UK law, Easysite now offers additional support to help users meet the standards set out in the new General Data Protection Regulation.

As part of these changes there is now a new section within Easysite located under People => Users => Consent. This will present the main admin section where you can manage the various consent items you have. From this screen you will be able to view the existing consent items and have the option to start the process to add a new item to the system.

The main table includes details of each consent item such as its title, the number of people who have accepted the consent item and next to that in brackets the total number of people the consent item is linked to. Finally, we have the option to delete, which can be accomplished by selecting the item you want to delete and clicking on the "Delete selected" button at the bottom right of the screen, when clicking on this button you will be presented with a chance to confirm you wish to delete the items to ensure this does not happen by mistake. Next to the delete button is the "Export All" button, clicking on this will redirect you to the export screen where you can specify options such as a date range to retrieve a list of the consent log data.
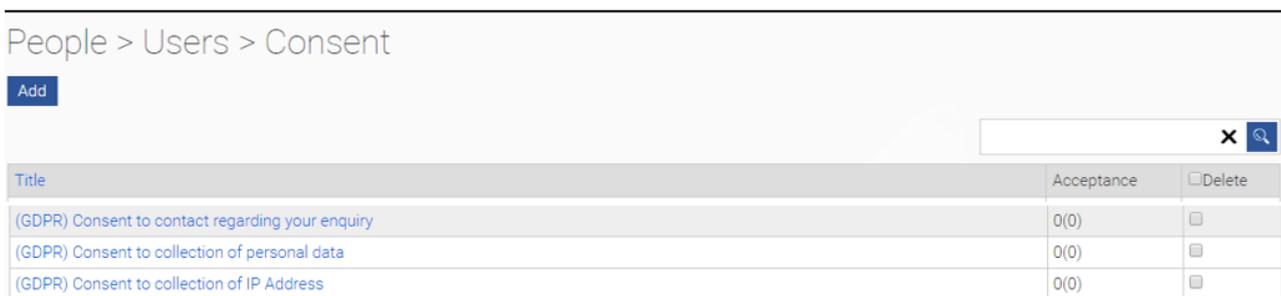

Clicking on the add button or on the title of an existing consent item will take you through to the details page. By clicking through on a title, the details page will be pre-populated with the associated data and when using the add button no information will be pre-filled and only the first two tabs will appear.

The General tab displays the basic information about the consent item such as the title, the friendly name, the description and the selected owner of the consent item.

The second tab "Context" contains the more specific information related to the consent item such as the rationale for the consent item, a text description of what it is related to; a linked page which can be used to present more details surrounding the consent item; the expiration offset which is the number of days after a user has confirmed the consent item it will automatically expire. The final option on this tab, which will only display for existing items is the ability to revoke all granted consent items.
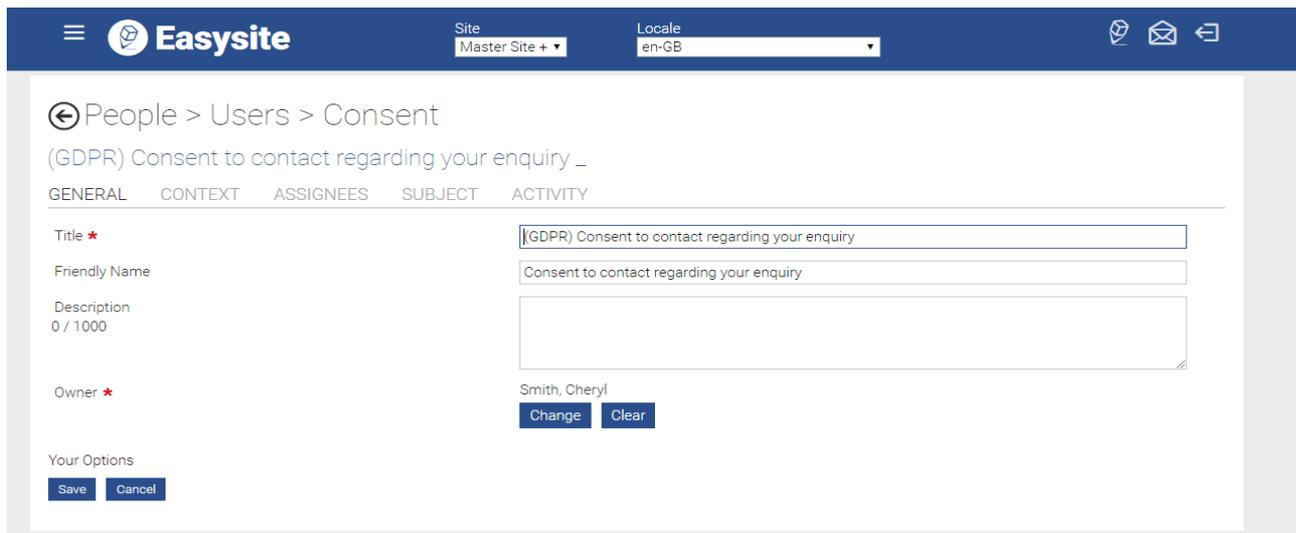
The Assignees tab contains a list of groups which the consent item can be linked to, this allows you to specify consent items for users. A group can be linked to the consent item by ticking the checkbox in the right most column and saving the page. The Subject tab will show a list of all individual users who have this consent item assigned to them, whether they have given consent and when that consent will expire. The final tab Activity will display a list of the log items related to this consent.

As you will probably be aware one of the items within GDPR is allowing users to access a list of information a company holds about them. To satisfy this a new tab has been added into the user details page. This tab is titled "Data" and will present you with a list of the sections of the site where data for this user may be stored. To export the data, you can select one or more additional checkboxes, select the export format and then click the Download button. Once the system has retrieved the data you will be able to download it in the chosen format. This tab also allows you to download the entire history of consent items associated to a user and each event such as granting, and revoking will be recorded here.

The new changes also affect the login control where you now have the option to specify what happens when the user logs in and has outstanding consent items. You have the option of selecting to do nothing in which case the "On Successful login action" will be performed, redirecting to a nominated page, or sending the user through to their homepage (if one exists). This will be followed if the user has any associated consent items which have not been granted or have expired, if everything is up to date the "On Successful Login" action will be performed as normal
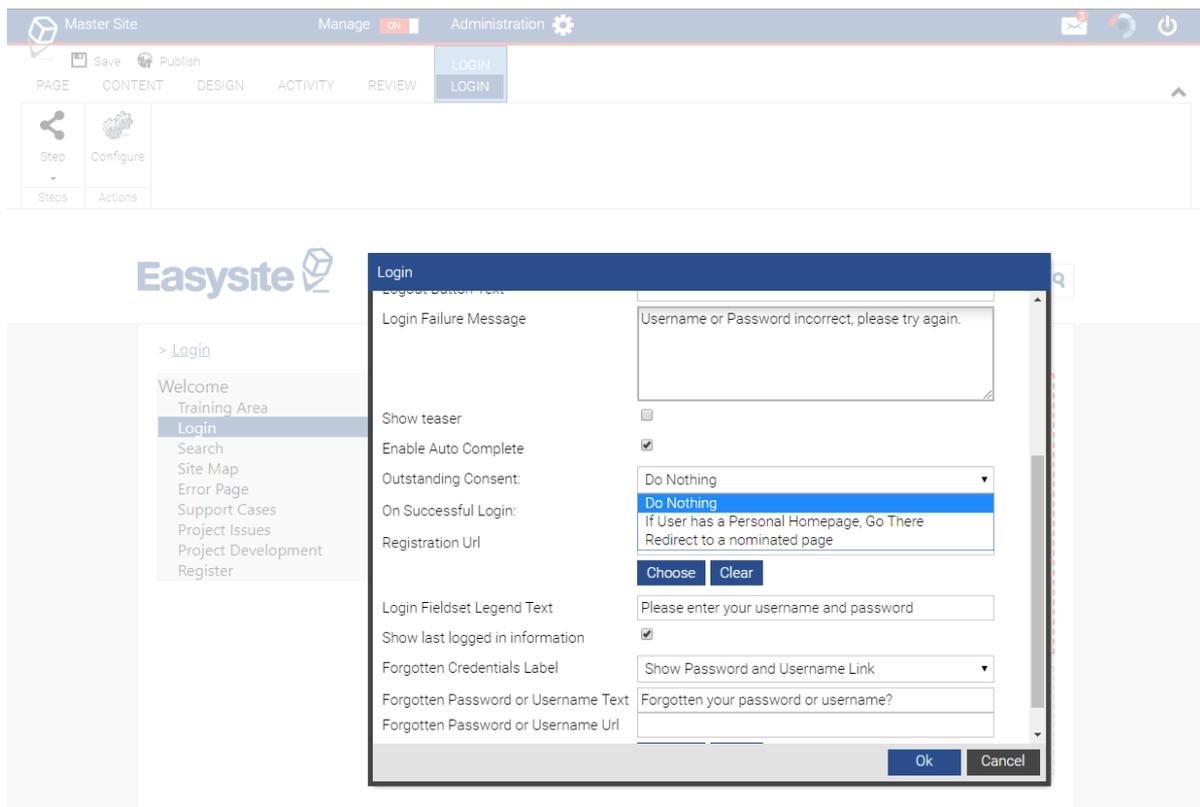
The final change for GDPR allows you to present the user with the consent items which are applicable to them. This is done through the forms module, where if you add a checkbox element to a form there is now an option under the "Answers" configuration tab where you can specify to populate the control by GDPR consent items. Selecting this will present a list of all consent items they are associated with. As this is dynamic and potentially differ between users, there may be a couple of differences when presenting the data, such as the checkbox element will no longer provide a value.

Form Permissions

There 3 privileges that users need to be aware of for forms. These are Forms Administrator, Forms Manager and Forms Data Controller.

If you would like a user to have full control over form creation, deletion user submissions and all forms of export and importing then then the group they are assigned should be given the Forms Administrator privilege. However, the Form manager privilege will only allow the users with this to create, delete, edit, import and export form templates that have the relevant read and/or write permissions. They will not be allowed to see user submissions.

Users with the Forms Data Controller privilege will only be allowed to view, delete, export and import form submissions. Again, they will only see the forms they have read or write permissions to.

These new privileges are there so that users can better control over who can see possible sensitive data.
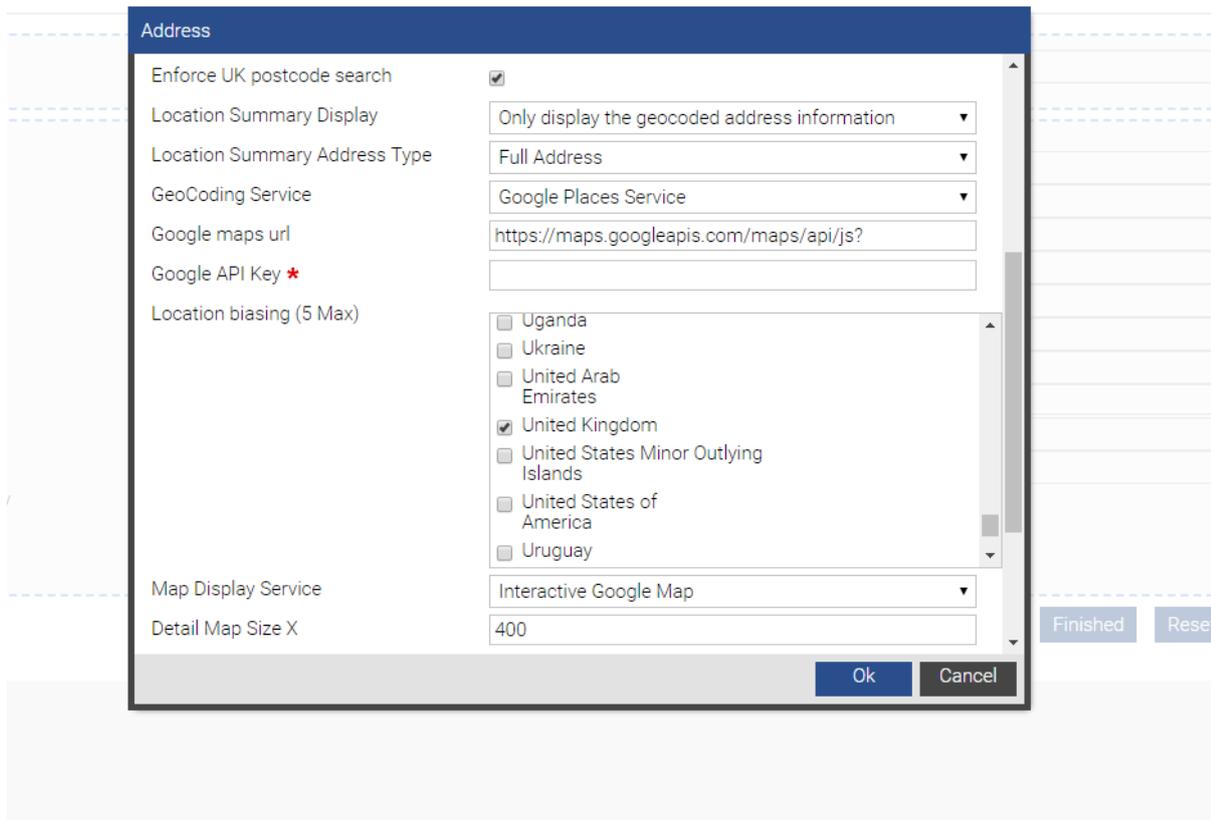
Directory Location Selector

Modules **>** Content **>** Directory Builder

Choose Google Places as the Geocoding service add your Google Api key and choose at least one from the location biasing this will ensure Google doesn't return places from outside of the chosen area(s).

Please note the Channel Islands and the Isle of Man are considered outside of the UK by Google.

After setup this will allow the Google AutoComplete functionality that can be used to find the required place.
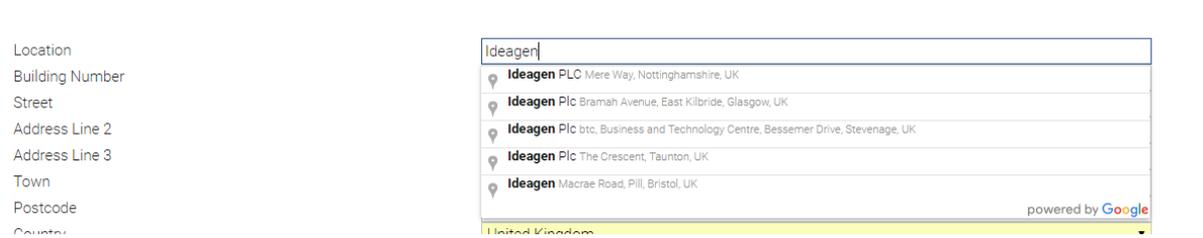
The auto complete functionality can also be used with the directory quick search and directory record search elements.

ISAPI

Another major change made in this version is Easysite no longer needs an ISAPI filter to run, instead the function is handled by the URL rewrite module for IIS. For an upgrade to this version, this requires 2 things, firstly the URL rewrite module needs to be downloaded and installed, which can be obtained here (https://www.iis.net/downloads/microsoft/url-rewrite) and the ISAPI filter can be removed from the installation. This can be done by going to the root of the Easysite installation in IIS and double clicking the ISAPI filters feature, then select the Easysite ISAPI item and click "Remove" in the actions pane.

Once these items have been made, the system will continue to work as it did before including any ignored paths, assets and shortcuts.

.Net Version

With the release of Easysite 8 the Microsoft .Net framework version to 4.7 this can be accessed and downloaded for your server here (https://www.microsoft.com/en-us/download/details.aspx?id=55170).