



All Applications Release Bulletin

July 2014

In this bulletin...

System Administration and My BackPack (General) Enhancements	2
Academic Office Enhancements	4
Business Office	6
Alumni/Development Enhancements	7
New Fee/Charge Confirmation Options	8
NEW! Faculty Directory	10
NEW! Broadcast Email for Faculty	14

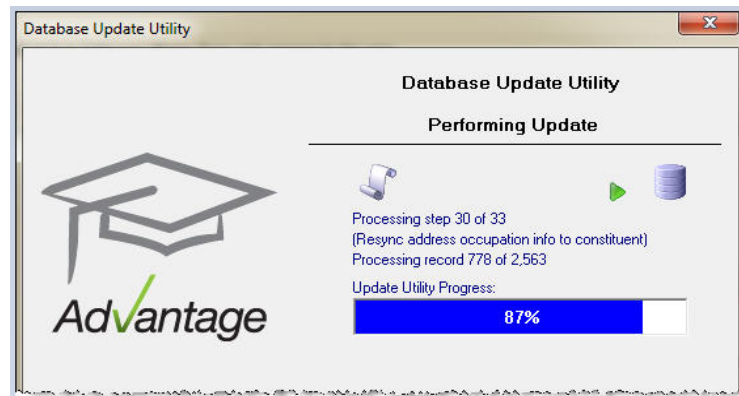
About Release 92_7

Release 92_7 introduces several significant enhancements to My BackPack, including a new Faculty directory and Faculty broadcast email. Advantage enhancements include the ability to generate report cards in Summer School, as well as numerous enhancements throughout all applications.

As always, please contact Support@senior-systems.com if you have any questions about these new and enhanced features.

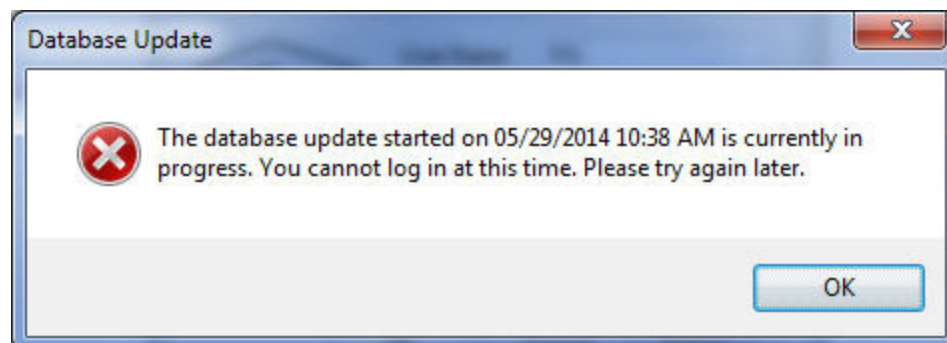
System Administration and My BackPack (General) Enhancements

92_7 Database Update - For Alumni/Development customers, you may notice the 92_7 database update runs a little longer than usual. This is because the system is processing a fix to work address formats. It is important that you do not stop the database update while it is processing these changes. A counter will show you the progress of the update .

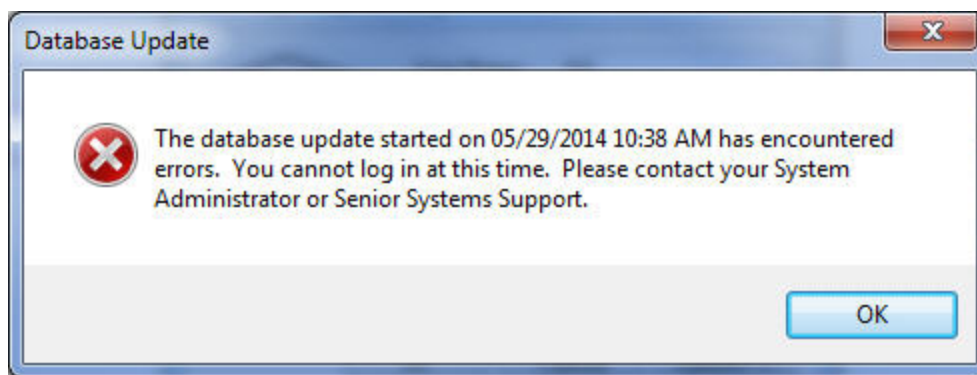


Update in Progress - While a database update is in progress, it is important that users do not log into the database and attempt to perform tasks (particularly related to changing data). To help prevent this from happening, messages have been added to warn users when a database update is in progress.

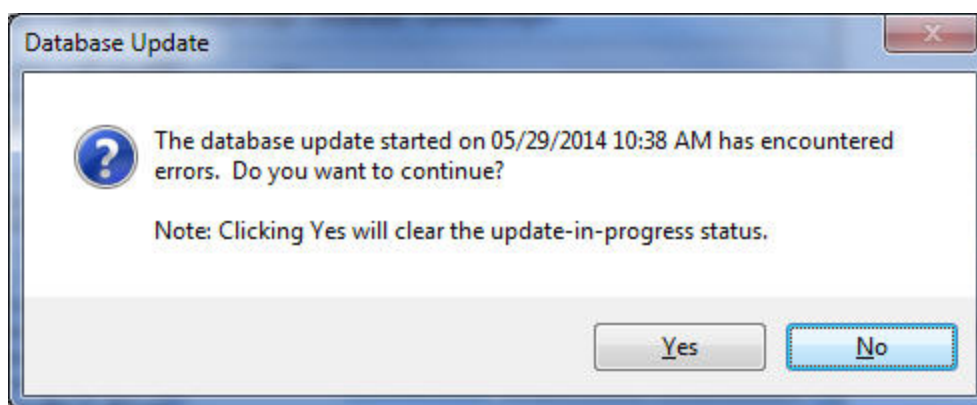
- If a database update is in progress and a user attempts to log into an Advantage application at the school, they will see this message:



- In a less likely scenario, a database update was begun, encountered errors, and the user running the update exited the update program, leaving the database in an unstable state. If a user attempts to log into an Advantage application while the database is still in an unstable state, they will see this message:



- The message below will display in the same scenario as above, only if the user attempts to log into System Administration. The user will have the option to clear the "in-process" state.



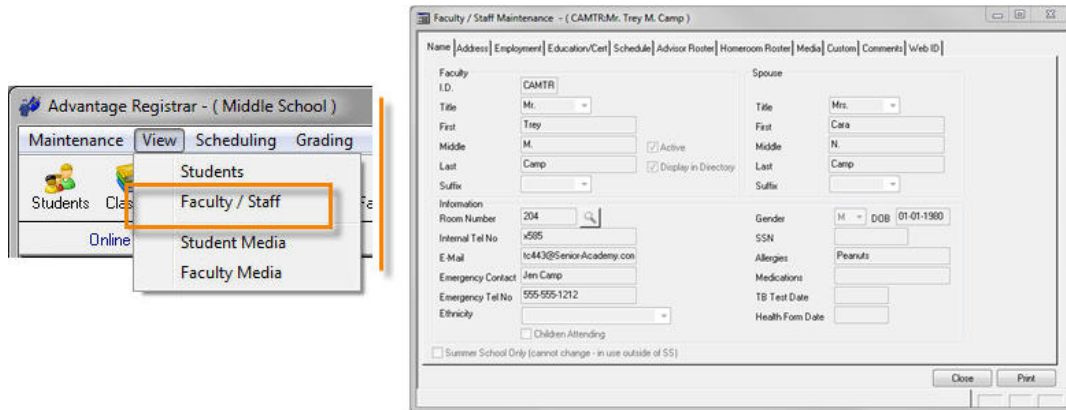
Android Mobile App - The Advantage mobile app for Android has been updated. The app is now compatible with Android 4.2. The updated application is available in Google Play, for your school's mobile users. The school does not need to take action to receive this update.

Broadcast Email Error Log - The Broadcast Email error log has been updated to include a more detailed description of the following errors:

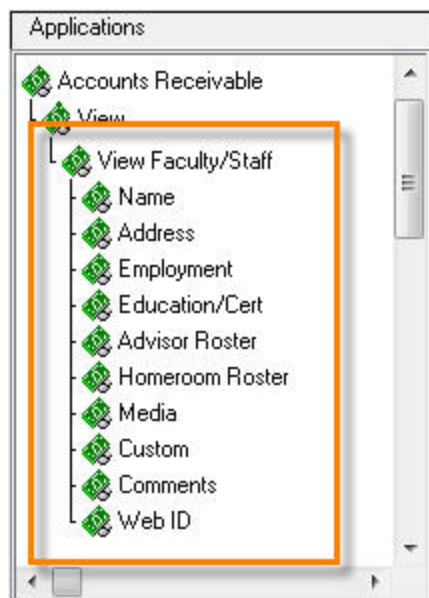
- **MessageJobProcessor** - This line will appear in the error message if the email is breaking out of the loop due to an exception.
- **EmailScheduleService** - This line will appear in the error message if there is an invalid email address.
- **MessageJobRecipient** - This line will appear in the error message if a log exception occurs.

Academic Office Enhancements

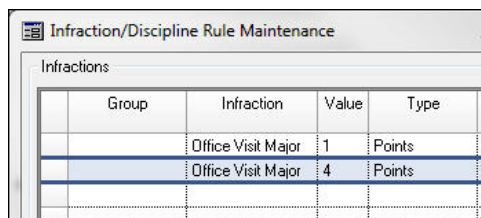
View-only Mode for Faculty Records - This release adds the ability to grant access to faculty records in View mode (with no edit capability). You can view faculty records in the Accounts Receivable, Registrar, and Summer School applications.



There are new security keys for this feature in Accounts Receivable, Registrar, and Summer School. The security keys can be used to control a user's (or user group's) level of access to viewing information about a faculty/staff record. These keys are not automatically granted upon database update. This new feature allows you to give users access to view information about faculty without necessarily allowing users to modify records.



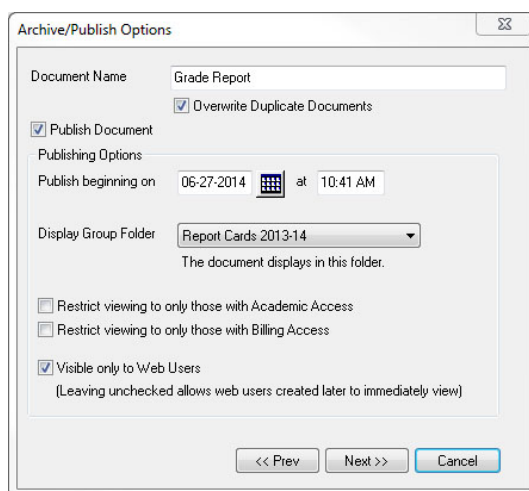
Infraction Suggestions - In the Deans Office application, you can now enter multiple rules for a single infraction group. For example, in one infraction group, you can now set up one rule for 2 infractions, and another rule for 5 infractions. Note that you cannot have two rules in the same group with the same value.



Group	Infraction	Value	Type
	Office Visit Major	1	Points
	Office Visit Major	4	Points

New Security Keys added for GPA access in Registrar and Academic History - New **GPA/Rank** security keys have been added in Advantage System Administration to control editing permissions for the GPA Rank tab in the Registrar and Academic History applications. These keys are not automatically granted upon database update (previously this functionality was only available as the schema owner).

Archive/Publish Grade Reports - A new option has been added to the Summer School application, which allows you to create, archive, and publish Grade Reports (Report Cards, Transcripts, etc.). Previously, this tool was only available in Registrar.



Archive/Publish Options

Document Name: Grade Report

☒ Overwrite Duplicate Documents

☒ Publish Document

Publishing Options

Publish beginning on: 06-27-2014 at 10:41 AM

Display Group Folder: Report Cards 2013-14

The document displays in this folder.

☐ Restrict viewing to only those with Academic Access

☐ Restrict viewing to only those with Billing Access

☒ Visible only to Web Users
(Leaving unchecked allows web users created later to immediately view)

<< Prev Next >> Cancel

Transcripts & CPT Online Test Scores - Last spring, the CPT Online test was added to the test score import tool. If you plan to include this test score type on custom transcripts, the transcript will need to be adjusted to include it. Please contact Support@Senior-Systems.com to request the change.

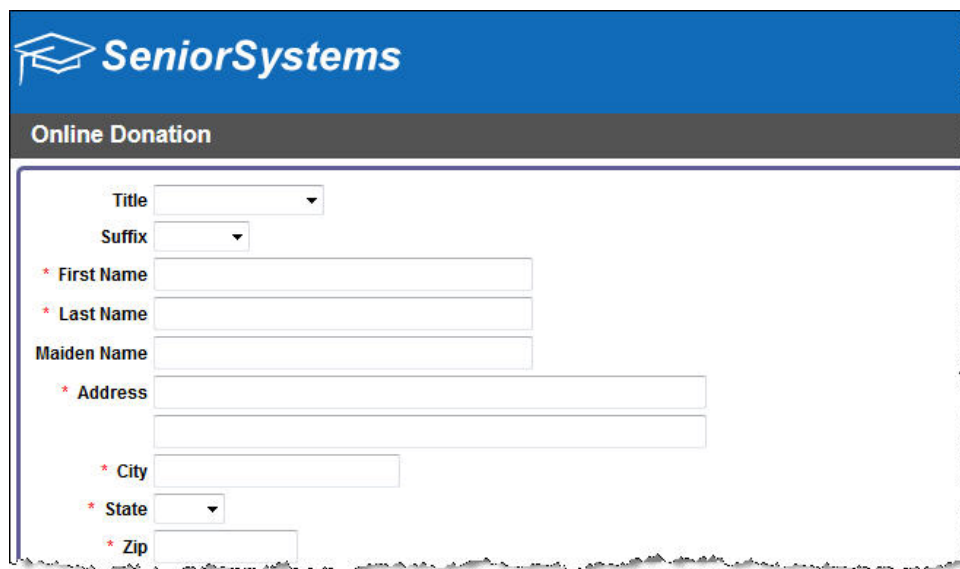
Business Office

Vendor Media is now available in Campus Store - Vendor Media has been added to Campus Store. Media is shared with Accounts Payable. Security keys have also been added in System Administration for Campus Store and Accounts Payable Vendor Media.

Check Number Added to SMART import - You can now use the SMART import when you are importing payments as 'prepaid'. Previously, this was not possible because the import did not include check numbers. The check number was added to the import, and a field for default value was added to the import screen.

Alumni/Development Enhancements

Online Giving Branding - For customers with the redesigned My BackPack, the Unregistered Donation page (for those who want to make donations online but do not have My BackPack accounts) will now reflect the custom branding of your My BackPack site. This enhancement is available only for customers using the redesigned version of My BackPack.

A screenshot of the Senior Systems Online Donation form. The form is titled "Online Donation" and features the Senior Systems logo at the top. The form fields include: Title (dropdown), Suffix (dropdown), * First Name (text), * Last Name (text), Maiden Name (text), * Address (text, split into two lines), * City (text), * State (dropdown), and * Zip (text). The form is enclosed in a blue border with a white background.

Work Address Formats - You may notice the 92_7 database update runs a little longer than usual. This is because the system is processing a fix to work address formats. Now, when running an export, the constituent occupation fields will select the latest active work address.

New Fee/Charge Confirmation Options

There are new and enhanced options in Merchant Accounts Setup that give you more customization options for fees, surcharges, and agreement text.

Note: This update will not remove any existing settings you already have in this area, but it may be a good time to review your agreement text, given the new features.

The screenshot shows the 'Merchant Accounts' setup interface with the 'Fee/Charge Confirmation' tab selected. It contains two sections for configuring fees and surcharges. The first section is for 'eCheck' payments, with fields for 'Page Title' (Surcharge Agreement), 'Fee Label' (Surcharge), and 'Title1' (Surcharge Agreement). It includes a text area for 'Text1' with a sample agreement about a convenience fee. The second section is for 'Credit Card' payments, with fields for 'Title2' (Title) and 'Text2' (a warning about Visa DEBIT cards). Both sections have checkboxes for 'Active?' and 'Show only if fee/surcharge is enabled'.

- **Page Title:** This field controls the title of the page that appears to the parent user when he or she uses a payment method associated with a fee or surcharge.
- **Fee Label:** This field controls the text that appears by the line item that represents the fee or surcharge on the parent's screen.

The screenshot shows the 'Surcharge Agreement' confirmation screen. It displays a summary table with 'Total Payment' at \$10.00, 'Surcharge' at \$0.01, and 'Total Amount Charged' at \$10.01. Below the table is a text area with the same sample agreement text seen in the setup screen. At the bottom, there is a checkbox labeled 'I have read and agree.' which is checked, and 'Cancel' and 'Next' buttons.

- **Messages 1-4:** You can configure up to four confirmation messages. You can control which type(s) of payment methods should require confirmation(s). Each block of text allows you to enter a header and informational text.
- **Select Payment Type:** Use the Payment Type button to apply the message to certain types of payments. You can apply the message to one or multiple payment types at a time.

Merchant Accounts | Online Giving | Online Statement | **Fee/Charge Confirmation**

Page Title: Surcharge Agreement

Fee Label: Surcharge Apply

Title1: Surcharge Agreement

Text1:

✓ Check all ✗ Uncheck all ✕

☐ Credit Card

☒ eCheck

☐ Check

Your school charges a convenience fee for all online tuition/incidental payments. This fee is separate from the 'Total Payment' obligation you are paying. The convenience fee is included in the 'Total Amount Charged' line, above. Please check the 'I agree' checkbox, below, to confirm your acceptance of the convenience fee and agreement to pay the 'Total Amount Charged' amount indicated, subject to and in accordance with the agreement governing the use of your card.

- **Active?:** In order for this message to appear, the 'Active?' flag must be checked. This means you can enter text and save it for review prior to activating it on parent payment screens.
- **Show only if fee/surcharge is enabled:** You can choose to require confirmation whether or not a surcharge is being applied.

Title1: Convenience Fee Agreement Credit Card, eCheck, Check

Text1:

☒ Active? ☒ Show only if fee/surcharge is enabled

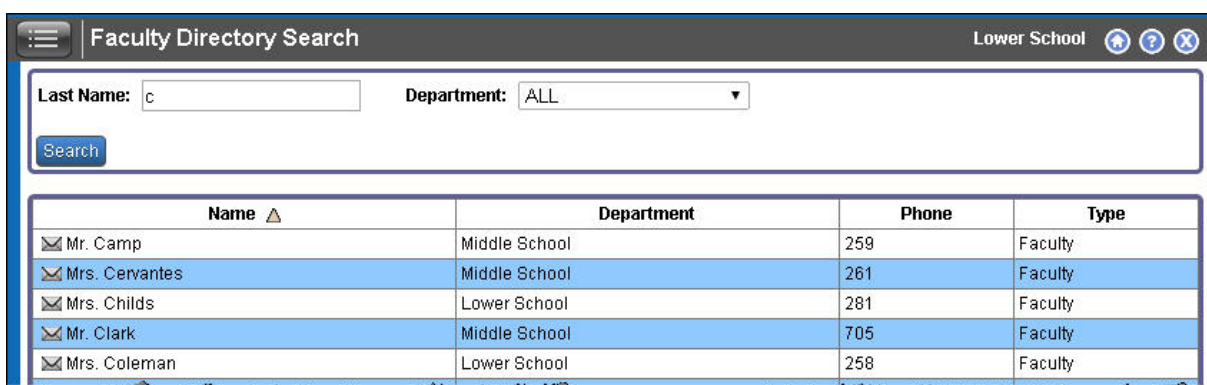
Your school charges a convenience fee for all online tuition/incidental payments. This fee is separate from the 'Total Payment' obligation you are paying. The convenience fee is included in the 'Total Amount Charged' line, above. Please check the 'I agree' checkbox, below, to confirm your acceptance of the convenience fee and agreement to pay the 'Total Amount Charged' amount indicated, subject to and in accordance with the agreement governing the use of your card.

Tip: This checkbox gives you the option to enable agreement text even if no fee or surcharge is associated with it. This might be helpful if you want to require a confirmation that is not necessarily related to payment methods.

NEW! Faculty Directory

We are excited to introduce a totally new faculty directory for My Backpack! The new directory answers multiple customer requests, and is designed for maximum flexibility to suit a variety of needs. You can optionally show or hide the directory from parents, faculty, students, and even constituents. Not only that, you can control the information available for each community on a field-by-field basis. Just in time for the new school year!

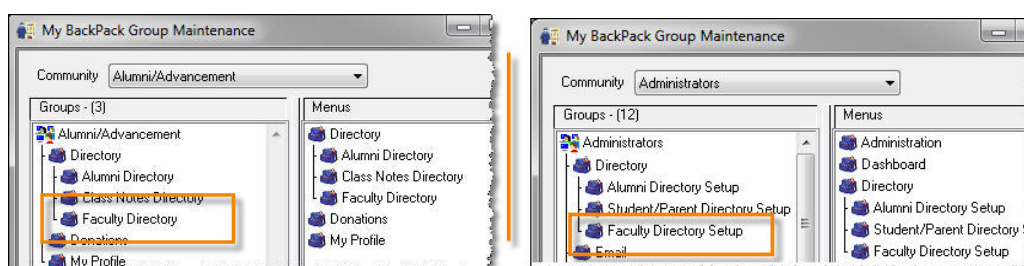
Important: The faculty directory is **not** automatically visible for My Backpack users. There are a number of setup tasks that must be completed, including assigning security keys, before the faculty directory is available to any My Backpack user.



Name	Department	Phone	Type
Mr. Camp	Middle School	259	Faculty
Mrs. Cervantes	Middle School	261	Faculty
Mrs. Childs	Lower School	281	Faculty
Mr. Clark	Middle School	705	Faculty
Mrs. Coleman	Lower School	258	Faculty

Security Keys

Upon updating to 92_7, you will notice new security keys for setting up the directory (Administrators) and viewing the directory (Advancement, Faculty/Staff, Parents, and Students). Simply add the keys to the appropriate user groups.

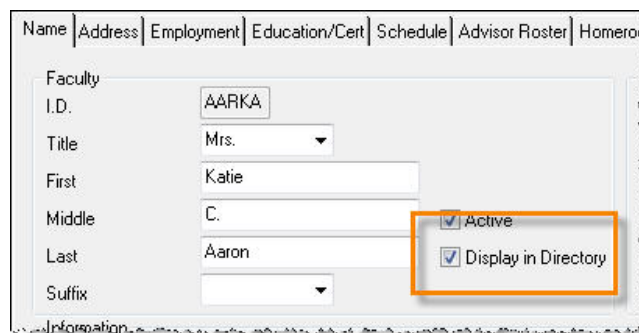


Note: These keys will not be added to user groups automatically. You must add them manually to the group(s) that will need access to this feature.

Setting up the Directory for the First Time

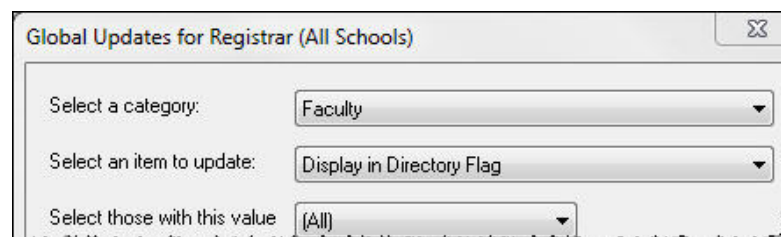
There are a couple of considerations when you first set up the directory. You can specify what information about faculty records is available to specific My BackPack communities. You can also hide specific faculty records from the directory completely, on a case-by-case basis.

- **Show/Hide Specific Faculty Records:** In order to appear in the directory, a faculty record must have the option "Display in Directory" checked.



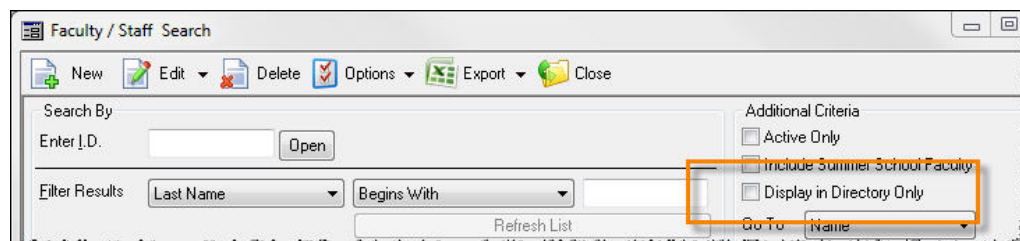
The screenshot shows a form titled "Faculty Information" with tabs for Name, Address, Employment, Education/Cert, Schedule, Advisor Roster, and Homeroom. The form contains fields for I.D. (AARKA), Title (Mrs.), First (Katie), Middle (C.), Last (Aaron), and Suffix. Two checkboxes, "Active" and "Display in Directory", are checked and highlighted with an orange box.

This flag is available in Global Updates:



The screenshot shows a form titled "Global Updates for Registrar (All Schools)". It has three dropdown menus: "Select a category:" (Faculty), "Select an item to update:" (Display in Directory Flag), and "Select those with this value" ([All]).

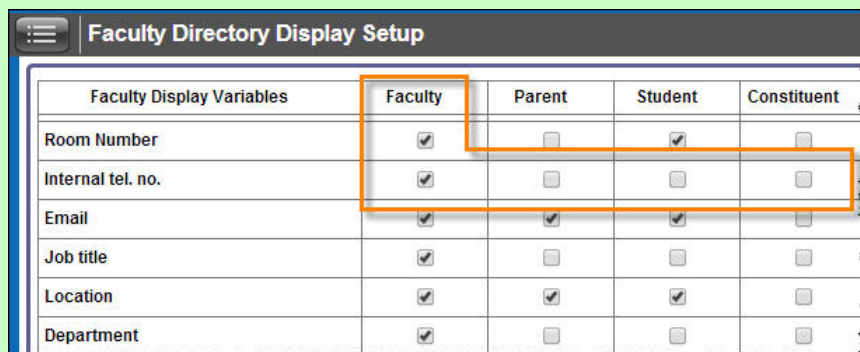
You will notice a new option in Faculty Maintenance to filter based on this flag, giving you an easy way to preview which records are available in the directory:



The screenshot shows a "Faculty / Staff Search" window. It has a toolbar with New, Edit, Delete, Options, Export, and Close. Below the toolbar, there is a "Search By" section with "Enter I.D." and an "Open" button. There is also a "Filter Results" section with "Last Name" and "Begins With" dropdowns. On the right, there is an "Additional Criteria" section with three checkboxes: "Active Only", "Include Summer School Faculty", and "Display in Directory Only". The "Display in Directory Only" checkbox is checked and highlighted with an orange box.

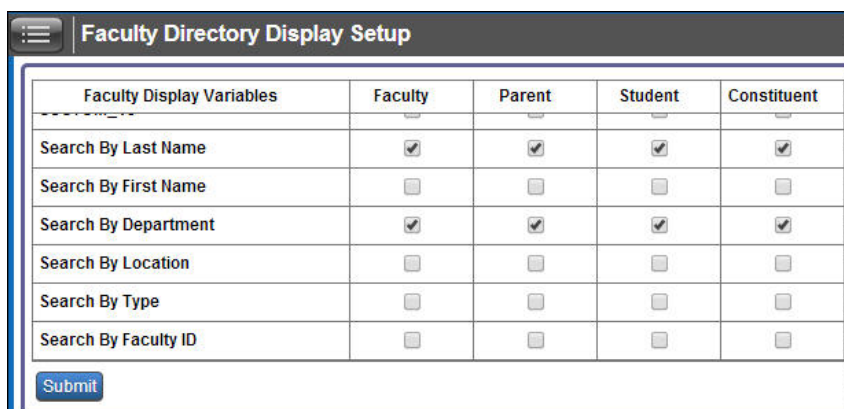
- **Show/Hide Specific Fields:** The Faculty Directory Display Setup page gives you field-by-field control over what information is available on a faculty's record in the directory, to what types of users.

Tip: While it might be helpful to show internal phone extensions to coworkers, you might not want to show this type of information to parents, students, or constituents. In this case, you can use the community-specific options to make "Internal tel. no." visible to Faculty, but not any other community.



Faculty Display Variables	Faculty	Parent	Student	Constituent
Room Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Internal tel. no.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Job title	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Search Options:** You also have control over what is available in the directory search filter, and again you can control search options on a community basis.



Faculty Display Variables	Faculty	Parent	Student	Constituent
Search By Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Search By First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search By Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Search By Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search By Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search By Faculty ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

• Options:

- **Portrait** - Display Portrait of Faculty, Parent, Student or Constituent
- **Faculty Name** - Display Faculty Name of Faculty, Parent, Student or Constituent
- **Room Number** - Display Room Number of Faculty, Parent, Student or Constituent
- **Internal tel. no.** - Display Internal tel. no of Faculty, Parent, Student or Constituent
- **Email** - Display Email of Faculty, Parent, Student or Constituent
- **Job title** - Display Job title of Faculty, Parent, Student or Constituent
- **Location** - Display Location of Faculty, Parent, Student or Constituent
- **Department** - Display Department of Faculty, Parent, Student or Constituent
- **Type** - Display Type of Faculty, Parent, Student or Constituent
- **Include Summer School faculty** - Display Summer School faculty of Faculty, Parent, Student or Constituent
- **Include inactive faculty** - Display Inactive Faculty of Faculty, Parent, Student or Constituent
- **Custom_1 through Custom_20** - Display Custom Fields 1 through 20 of Faculty, Parent, Student or Constituent
- **Search By Last Name** - Enables searching of Last Name for Faculty, Parent, Student or Constituent
- **Search By First Name** - Enables searching of First Name for Faculty, Parent, Student or Constituent
- **Search By Department** - Enables searching of Department for Faculty, Parent, Student or Constituent
- **Search By Location** - Enables searching of Location for Faculty, Parent, Student or Constituent
- **Search By Type** - Enables searching of Type for Faculty, Parent, Student or Constituent
- **Search By Faculty ID** - Enables searching of Faculty ID for Faculty, Parent, Student or Constituent

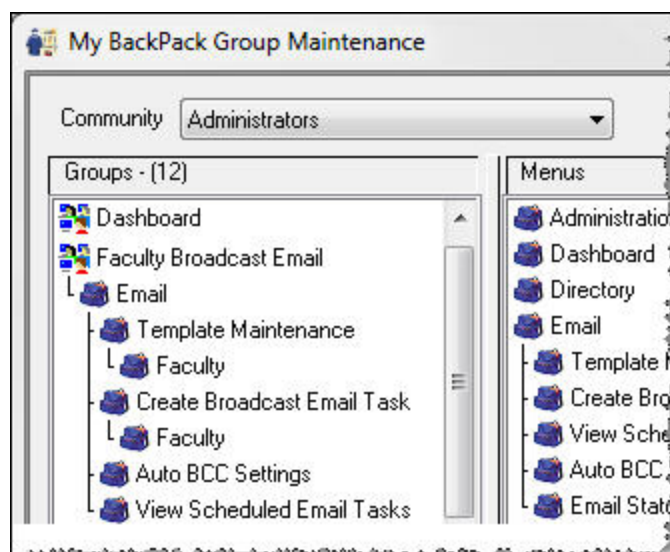
Note: This new feature is available with the redesigned version of My Backpack only.

NEW! Broadcast Email for Faculty

Just in time for the new school year! We are excited to announce that My BackPack can now send broadcast email to Faculty, a totally new feature with this release. This new feature follows the same workflow as is currently used for sending broadcast emails to parents, students, constituents and friends. It comes with the full compliment of email templates, merge fields, scheduled tasks, automatic BCC settings, and job logs.

Setup

Upon updating to 92_7, you will notice new security keys for faculty broadcast email and related keys in My BackPack group maintenance. Simply add the keys to the appropriate user groups.

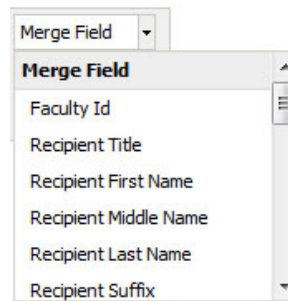


Note: These keys will not be added to user groups automatically. You must add them manually to the group(s) that will need access to this feature.

Features

- **Recipient Selection:** Recipient selection for broadcast email will look very familiar to current My BackPack users who use other types of broadcast email. On the Basic tab, you have multiple options for selecting faculty recipients, including employee type ("All" meaning all active faculty records, "Faculty" meaning all faculty records who teach at least one class, or have at least one advisee), teacher type, divisions (including Summer) and grades, schools, gender, location, and department. You can also switch to the Advanced tab and use a query (this query type is managed in **Advantage System Administration > Assign Groups to Web Users > Faculty**).

- **Faculty Merge Fields:** A number of merge fields are available for faculty broadcast email, including name and spouse information and some employment information.



- **Email Templates:** As with other types of broadcast email, you can create email templates for repeatable broadcast emails. There is a new tab for Faculty templates on the existing email template screen.
- **Auto BCC Settings:** Options for faculty broadcast email have been added to the Auto BCC Settings screen.
- **Scheduling Emails:** As with other types of broadcast emails, you can schedule the email task for a certain date and time. You can see the status of pending jobs and optionally receive logs.

Note: This new feature is available with the redesigned version of My Backpack only.