



# All Applications Release Bulletin

## December 2010

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### About Release 91\_9

Release 91\_9 incorporates a number of new features that affect multiple Senior applications, including new address tasks to facilitate the conversion of online parent web user accounts and changing the Family ID, automatic BCC features for broadcast emails in My Backpack, the ability to view custom fields on the Student Search screens, and new additions to the Student Grade Update process for schools who also use the Alumni/Development application.

As always, please contact Senior Systems Product Support if you have any questions about these new and enhanced features!

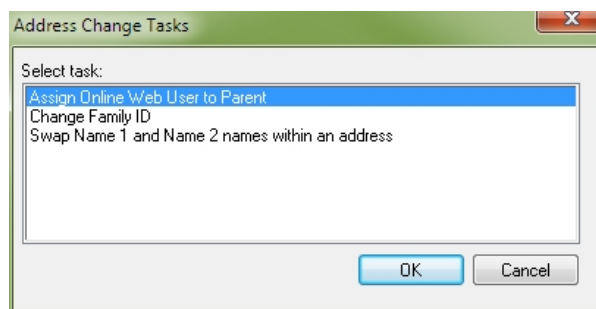
## New Address Tasks/Web Account Merge

There are two new address tasks to assist with the conversion of online web users to Parent Community accounts, and to facilitate the process of changing a Family ID (which can also merge the online data from multiple parent web accounts, where applicable). As with the existing address tasks, these new tasks invoke wizards to walk you through each step of the process.

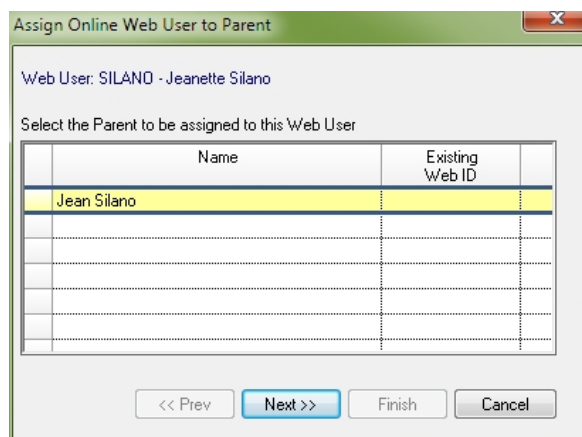
### Assign Online Web User To Parent

This task converts a temporary online web user account (created during the Online Admissions process) to a My BackPack Parent Community account, allowing the new parent user to keep the same user name and password. Depending on how your system preferences are set, you may also have the option to assign security groups to the new parent web account after it is created, though a security group is not necessary to allow the parent to participate in Online Enrollment.

1. Click **TASKS** from the Address tab for an applicant or student, select **Assign Online Web User to Parent**, and click **OK**.



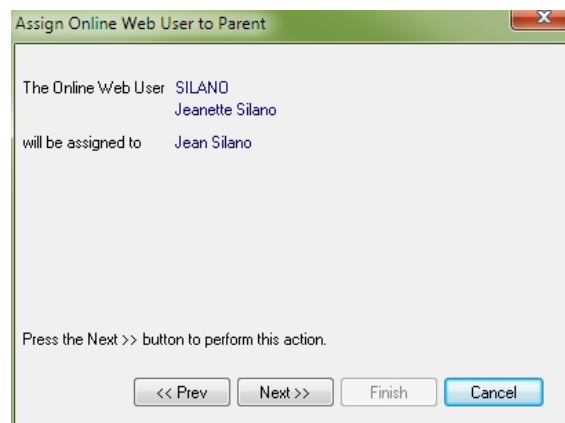
2. If the system cannot determine to whom the web account should be assigned (based on the first and last name), you must select the parent from the list and click **NEXT**.



3. **If the parent already has an existing web user account**, you will be prompted to select which of the two web account user names to keep. (The other account will be deleted after transferring all web components to the other account that is being kept.) Select the user name to keep, and click **NEXT**.



4. The assignment details are presented for confirmation. Click **NEXT** to complete the action.



5. If your system preference is set to display the Web User Maintenance screen, you can now assign one or more security groups to the user if desired, and/or create or maintain accounts for any other listed parents. Click **APPLY** to save any changes that you make here, and then click **CLOSE** when you are finished, to return to the Address tab.

Parent Web User Maintenance for Family - 0001730

Select a Family Member to View/Edit Web User Details

Type	Name	Relation To Student	Existing Web User I.D.
Parent 1	Jean Silano		SILANO

Account Database User:  User I.D.:  Password:  Confirm Password:  ☐ Allow LDAP login for this user

Account Valid Dates: Start Date:  End Date:  Last Login: 11-15-2010 12:50 PM Mail sent date:  Comments:

Password Security: Last Changed On:  Next Scheduled Change:  Force Change By:  ☐ Revalidate Password on Next Login Failed Logins: 0  ☐ Lock Account

Assigned To

Type	I.D.	Name
Parent 1	0001730 - P1	Jean Silano

Groups

Assigned Groups:  Available Groups: Parents Full Access


Student Access

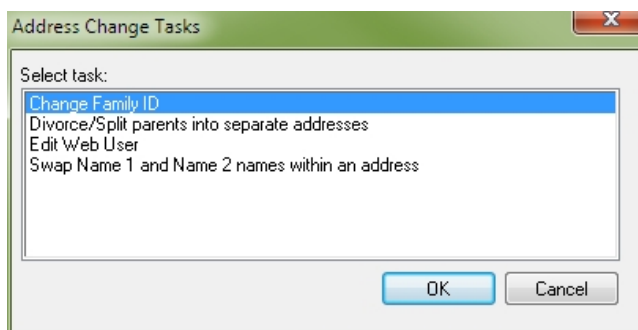
Family I.D.	Student I.D.	Grade	Student Group	Student Name	Academic Access

## Change Family ID

This task helps to manage the process of changing the Family ID for one or more students in a family, and ensures that data from the existing web accounts (such as online applications, online enrollment contracts, online summer school registrations, etc.) get properly transferred to the correct parent web accounts. Because the web account data is transferred as part of this process, this task can effectively be used to merge two existing parent accounts in the case where an existing parent has inadvertently created a new online web account to submit an application for another child. The steps in this process will vary depending on whether you are creating a new Family ID or transferring a student between two existing families, and whether you are changing the Family ID for all children in a family or just one/some of them.

If you remove all children from an existing family, all of the address records for that family are automatically deleted. Before and after performing this task, it is a good idea to research the records for the students and families involved so that you can verify that changes are made correctly.

1. Click **TASKS** from the Address tab for an applicant or student, select **Change Family ID**, and click **OK**. (Or you can click on the  Search icon next to the Family ID field, select an existing Family ID, and then click **OK** to proceed directly to step 3.)



2. **To create a new family** to which you will link the student(s):

- Click to select 'New Family ID', enter the new Family ID in the field and click **NEXT**.

The 'Change Family ID' dialog box shows the 'New Family ID' section selected. It has a radio button for 'New Family ID' and a text field containing '0001768'. Below it is an 'Existing Family ID' section with a radio button and a text field. To the right is a table with columns 'Name' and 'Code'. At the bottom are navigation buttons: '<< Prev', 'Next >>', 'Finish', and 'Cancel'.

- If there is more than one student in the family, select whether you want to change all students in the family, or just one or more selected students (by default, only the current student is selected). To change the selected student(s), click to check or uncheck the Include box next to the Student Name(s). You can optionally click the Expand icon to view the list of accounts and web components for an individual student. When the correct student(s) are marked, click **NEXT**.

The 'Change Family ID' dialog box shows the 'Select the students to move to the new Family ID' section. It has two radio buttons: 'All Student Accounts currently linked to this family' and 'Only the Student Accounts selected below' (selected). Below is a table with columns: Name, Include, ID, Type, School, Grade, Group, Admiss, and Class. The table lists two students: 'Alicia Margaret Byrne' and 'Celine Byrne'. The 'Include' column has checkboxes. Below the table are navigation buttons: '<< Prev', 'Next >>', 'Finish', and 'Cancel'.

Name	Include	ID	Type	School	Grade	Group	Admiss	Class
Alicia Margaret Byrne	<input type="checkbox"/>							
Celine Byrne	<input checked="" type="checkbox"/>		Applicant	Lower School	1	Applicant	2011	2023

- Create one or more new addresses for the new Family ID, in the same way that you would on the standard Address tab (a separate window will pop up when you click **NEW**). When the address information is complete, click **NEXT**.

Change Family ID

Enter the new addresses for this family:

EC	Name	Code	Address Type	Active	In Use	Visit	Grades	Primary	Prime
	Matthew Byrne and Harriet Byrne	Parent 1		✓	✓	✓	✓		

Address: 804 Solitude Lane, Smalltown, MA 12356  
Father: Matthew  
Mother: Harriet

Telephone Numbers:  
Tel No:  
Fax No:

E-Mail:  
Father:  
Mother:

<< Prev Next >> Finish Cancel

### 3. To link to an existing family:

- Click to select 'Existing Family ID', and enter the Family ID in the field (or click the Search icon to find the correct Family ID). You can click **SHOW LINKED STUDENTS** to verify that you have selected the correct family. Then click **NEXT**.

Change Family ID

☐ New Family ID  
Enter the new Family ID

☒ Existing Family ID  
Enter an existing Family ID 0001768

Name	Code
Matthew Byrne and Harriet Byrne	Parent 1

804 Solitude Lane  
Smalltown, MA 12356  
Father: Matthew  
Mother: Harriet

Tel No:  
Used by: Admissions

Show Linked Students

<< Prev Next >> Finish Cancel

- If there is more than one student in the family, select whether you want to change all students in the family, or just one or more selected students (by default, only the current student is selected). To change the selected student(s), click to check or uncheck the Include box next to the Student Name(s). You can optionally click the Expand icon to view the list of accounts and web components for an individual student. When the correct student(s) are marked, click **NEXT**.

Change Family ID

Select the students to move to the new Family ID

☐ All Student Accounts currently linked to this family

☒ Only the Student Accounts selected below

Name	Include	ID	Type	School	Grade	Group	Admiss	Class
Alicia Margaret Byrne	<input type="checkbox"/>							
Celine Byrne	<input checked="" type="checkbox"/>		Applicant	Lower School	1	Applicant	2011	2023

<< Prev   Next >>   Finish   Cancel

- For any web components associated with the student(s), select the appropriate person in the new family to whom these should be reassigned by selecting the name from the dropdown in the New Parent Assign To field. Any web user account for that person is then also displayed. (For a newly created Family ID, there will not yet be a parent web user account, but that is OK; when you later create a web user account for the person, all appropriate student data will automatically become available.) When all assignments have been made, click **NEXT**.

**Note:** You must complete the mapping for all of the web accounts listed on the left side of the screen, even if the number of people in the Assign To dropdown does not allow for a direct one-to-one correspondence. You can map the contents of more than one web account to a single person.

Change Family ID

The selected student(s) have information linked to the following people that must be reassigned to someone in the new family. To view the information, expand the row by clicking on the plus (+) sign.

You must select someone for each person listed on the left side.

Web IDs and passwords will not be moved to the new person.

Web User ID	Existing Parent Name	Code	New Parent Assign To	Web User
BYRNE	Sally Byrne	Parent 1	P1: Margaret Byrne	
	Submitted online application for Celine Byrne		P1: Matthew Byrne	
			(None)	

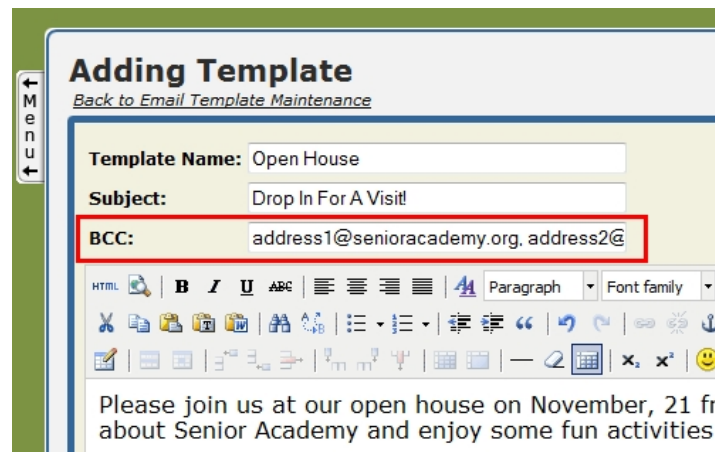
<< Prev   Next >>   Finish   Cancel

- At the confirmation screen, click **NEXT** to proceed.
- When the process is complete, click **FINISH** to close the wizard. Check to be sure the student record is now correct. When you later close the student record and return to the search screen, the student may be temporarily removed from the list due to the data change. Simply close and reopen the search screen (or change any of the filter criteria on the screen and click **REFRESH LIST**) to see the student on the list.

## New BCC Features in My BackPack Broadcast Email

There are new features in the My BackPack Admin and Faculty Broadcast Email functions to allow the entry of default BCC addresses in templates, and/or to automatically include certain BCC addresses for ALL broadcast emails sent by faculty or administrators (but NOT for automatically generated emails such as the Forgot Password or Confirmation emails). These features support standardization of procedures, for example, to allow administrators to better track broadcast emails, and help users to save time when creating certain types of broadcast emails.

- **BCC in Email Templates** - All email templates created or edited via Template Maintenance on the Email menu in the Admin or Faculty Communities of My BackPack now include a BCC field in the header. You can enter one or more email addresses, with multiple addresses separated by a comma or semicolon, and these are saved along with the template. Any values entered here can be changed or deleted later when creating an actual broadcast email using the template.



**Adding Template**  
[Back to Email Template Maintenance](#)

Template Name: Open House

Subject: Drop In For A Visit!

BCC: address1@senioracademy.org, address2@

HTML | B | I | U | ABC | Paragraph | Font family

Please join us at our open house on November, 21 fr about Senior Academy and enjoy some fun activities

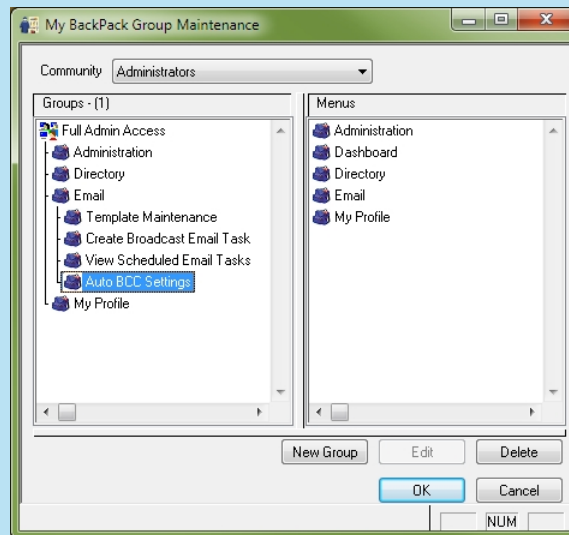
- **Automatic BCC For Broadcast Emails** - There is a new 'Auto BCC Settings' option on the Email menu in the Admin Community of My BackPack which allows an administrator to set options for BCC on ALL broadcast emails. These options are set separately for the Faculty Community and each type of email within the Admin Community, and allow you to specify a list of BCC recipients for ALL broadcast emails of the selected type, to indicate whether the BCC recipients should receive only the first email from the broadcast, and to indicate whether the BCC email should also include a distribution list. In the BCC field, you can enter one or more email addresses, with multiple addresses separated by a comma or semicolon. Note that any values entered here can NOT be changed or deleted later when a user creates an actual broadcast email, but are displayed for informational purposes.

**Note:** These automatic BCC recipients are in addition to any BCC recipients added to the email by the user and/or included from the email template.



## **How To Implement Automatic BCC**

**Note:** Upon database update, the security key for the Auto BCC Settings menu option is NOT automatically added to any My BackPack security groups. To implement this feature, you will first need to add this security key to any Administrator security group(s) that should have access to this menu option.



1. Select **Auto BCC Settings** from the Email menu in the Admin Community of My BackPack.

**Auto BCC Settings**

Logged in as: **Jennifer Cogan**  
Current School: **Lower School**

You can use the settings below to enable and specify an automatic BCC for ALL broadcast emails of each type. These BCC addresses are in addition to any BCC addresses added by the user in a template or at the time of composition. These automatic BCC addresses cannot be changed or deleted by users, but are displayed for informational purposes during the broadcast email creation process. Separate multiple email addresses with a comma or semicolon.

**Admin Community - Student/Parent Broadcast Emails**

Send an automatic BCC to the below email address	<input type="checkbox"/>
BCC Email Address	<input type="text"/>
Send only the first e-mail from this broadcast to the BCC recipients	<input checked="" type="checkbox"/>
Send distribution list to BCC recipients	<input type="checkbox"/>

**Admin Community - Constituent Broadcast Emails**

Send an automatic BCC to the below email address	<input checked="" type="checkbox"/>
BCC Email Address	<input type="text" value="devel@senior-systems.com"/>
Send only the first e-mail from this broadcast to the BCC recipients	<input checked="" type="checkbox"/>
Send distribution list to BCC recipients	<input type="checkbox"/>

**Admin Community - Admissions Broadcast Emails**

Send an automatic BCC to the below email address	<input checked="" type="checkbox"/>
BCC Email Address	<input type="text" value="admissions@senior-systems.com, jayneb@se"/>
Send only the first e-mail from this broadcast to the BCC recipients	<input checked="" type="checkbox"/>
Send distribution list to BCC recipients	<input checked="" type="checkbox"/>

**Faculty Community - Faculty Broadcast Emails**

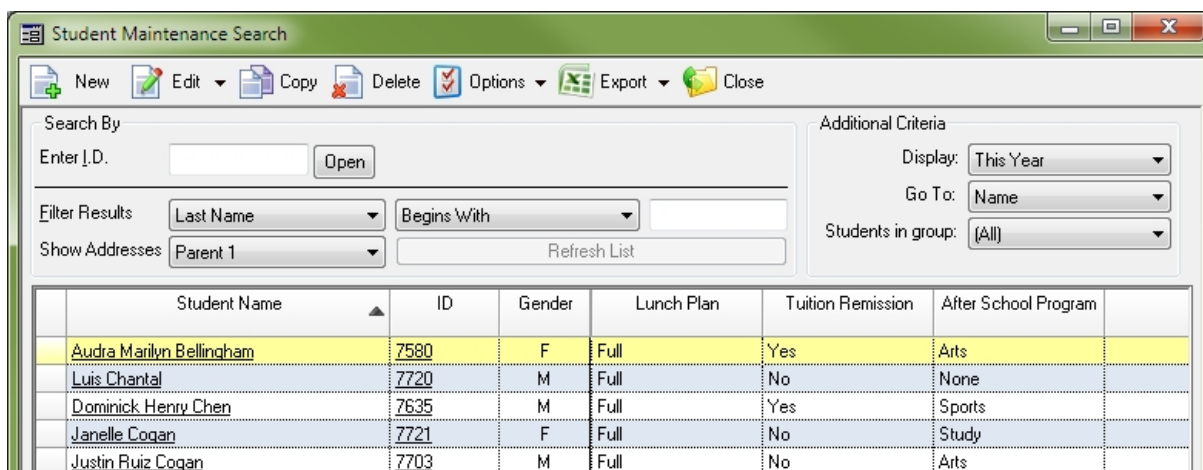
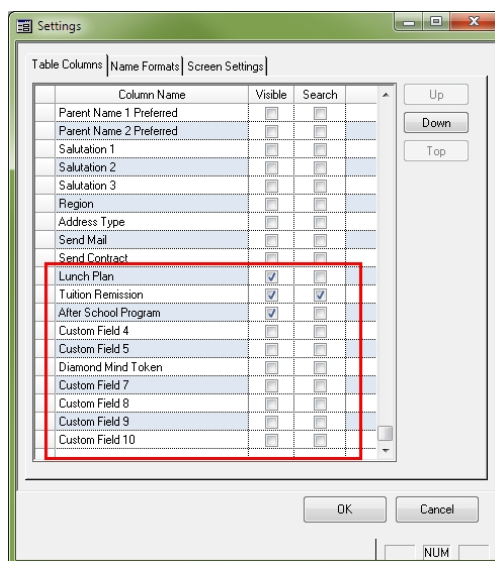
Send an automatic BCC to the below email address	<input type="checkbox"/>
BCC Email Address	<input type="text"/>
Send only the first e-mail from this broadcast to the BCC recipients	<input checked="" type="checkbox"/>
Send distribution list to BCC recipients	<input type="checkbox"/>

**Submit**

2. Use the checkboxes and BCC fields to enable automatic BCC and specify the settings for each type of email as desired, and then click **SUBMIT** to save the settings.

## Custom Fields on Student Search Screen

In the Accounts Receivable and Registrar applications, you can now select any of the first 10 Custom Fields for display and/or search on the Student Search screen. The column header displays the Custom Field Prompt as the field name. Keep in mind that in the Registrar application, custom fields can vary by school/division, so if your custom field setup is different between divisions and you regularly work with students in different divisions, your column headers will vary (any selected custom field that is not used for a particular division simply displays 'Custom Field' and the field number as the column header, although there will be no data for the column).



## Enhancements To Student Grade Update

For schools who use the Alumni/Development application, two new features have been added to the Student Grade Update function to save time and improve the constituent creation process:

- **Relationships between new graduates and their younger siblings** still in the school can be automatically created. You must separately select the relationship to use for the female student relationship to the graduate (e.g. 'Sister') and the male student relationship to the graduate (e.g. 'Brother').
- **Titles can be automatically inserted** for any graduating students who do not already have one. You must select the default title to use for graduating female students and graduating male students.

Both of these enhancements are included on a new screen that has been inserted into the Student Grade Update function as step 3. In all other respects, Student Grade Update functions as it did previously.

Student Grade Update (Step 4 of 8)

Please specify the values to be used to create relationships between graduates and students:

Female Student relationship to Graduate: Sister

Male Student relationship to Graduate: Brother

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Please specify the default values to be used to create titles for graduates as alumni:

Default Title to use for Female Students: Ms.

Default Title to use for Male Students: Mr.

<< Previous   Next >>   Cancel