

All Applications Release Bulletin

August 2015

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About Release 92_9

Release 92_9 is a wide-ranging release that introduces several significant enhancements to certain areas of the system. With 92_9, you'll see new Online Giving pages, a Resource Center for My BackPack, a new Enrollment Maximum area for Summer/Program Registration, a new gift search tool in Alumni Development, and an enhanced Student Medical Tab, to name a few. You will also notice minor enhancements throughout all applications. We hope you like these new and improved features!

As always, please contact <u>Support@senior-systems.com</u> if you have any questions.

User Management

Release 92_9 includes several new user management tools and features.

Passwords & User Account Management

Password Expiration option - A new password expiration preference has been added to System Administration that allows you to change the default 72 hour expiration time to suit your specific needs.

Syst	em Preferences	×
Ap	PP Description	Value
S	J Online donation Email.	test1@senior-systems.com
SI	J Online donation Email Sender.	test1@senior-systems.com
SI	J Online donation from unregistered user Email.	test1@senior-systems.com
SI	J How long should a password reset link remain active (hours)?	72
SI	J Show send error report button on MBP error screen?	Y
SI	J Send one broadcast email per family by default? Y for one email per family, N for one email per student.	N
S	J Show Branding In Online Inquiry Form.	Y
		Definition
		OK Cancel

Link for "Forgot Password" assistance - You can now directly link to the I Forgot My User Name/Password screen using the following link format:

<Your MyBackPack URL> + /facelets/registration/loginCenter.xhtml?resetPassword=true

This is particularly helpful if your school has set up an integration between My BackPack and your website provider.

Please enter your us account will be sent t	er name OR email address. Instructions for accessing your to you shortly.
User Name:	
Email Address:	
	Get User Name/Password
You can n from 3rd j	ow link directly to this page party websites.

Custom text for "Go to Login Page" button - You can now customize the text and target link for the "Go to Login Page" button. This is particularly helpful if your school has set up an integration between My BackPack and your website provider, and you want users directed to log in through the website provider's front door (with their My BackPack credentials).

You will find these new customization tools on the **Sign in Page Setup** page, on the new **Login Page Button** tab:

- Preview your current button settings.
- Customize the button text. By default, this text is set to "Go to Login Page".
- Set the URL for the button. By default, this button takes users to your My BackPack login page.
- By **Link** field, you can click **Test Link** to ensure that the link you've entered is valid.
- Click the **Reset to Default** button to restore the default text and link of the **Back to Login** button.

	n In Page Setup		· 💿 😨 (
Sign in Pa	age Login Page Button		Mr. Tom Jones MS/HS
Your cur Go to I	rent Login Page button appears Login Page	; like this:	
You can Text:	customize the text and link of yo Go to Login Page	our school's Login Page button using the fields below.	
I	Limit of 20 characters		
Link:	https://www.senior-systems.c	om/	Teet Link

The existing **Administrators** > **Login Page Setup** security in System Administration controls access to all content on the **Sign In Page Setup** page.

Notification email for Profile Changes - The automated email that is sent out when the My Profile page is updated has been enhanced with two new fields: Family ID and User ID. The User ID field is the user name of the person who made the change.

Constituent/Parent : Mrs. Paula Smith Constituent ID : 0029494 Family ID : PSMITH User ID : P.SMITH Please review the changes.

In System Administration > **My BackPack** > **Preferences**, you will find the **List of Change Biography Emails (separated by ;)** preference. The email address(es) listed in this field are the email address(es) of the administrator who receives the automated email. This automated email notifies the administrator that a change has been made on the **My Profile** page. The Administrator will then need to go into the appropriate Advantage application and approve this change.

S	ysten	n Preferences	×
	Арр	Description	Value
	SU	List of Change of Biography Emails (separated by ;)	test@senior-systems.com
	SU	limit users to a single session	Y
	SU	Create temporary password for forget password email.	Y
	SU	Should current giving level be displayed?	Y
	SU	Should lifetime giving history be displayed?	Y
	SU	Enter up to 3 email addresses that should receive error reports.	test@senior-systems.com
	SU	External HTTP(S) address to the FormBuilder server (URL from the client browser)	https://test03.senior-systems.com:444/FormBuilder
			Definition
			OK Cancel

Check for Email-on-file when user creates new account - In order to help prevent situations in which your My BackPack users create duplicate accounts, you now have the option to enable two preferences for Online Enrollment and Summer School to check to see if the email addresses entered when a user creates a new account are already associated with a My BackPack account.

Enable Check for existing user account for new MBP users? Y/N - This preference enables a check that warns users that they may already have a My BackPack account. If you enable only this preference, users will see a warning, but they can choose to continue and create an account with the duplicate email address anyway.

Require that new MBP users have a unique email address? Y/N - If the email address that the user enters is already in the database and the "Enable check..." preference is set to "Y", the user receives the following message at the top of the **Create Your Online Account** screen: Your user name is already associated with an account. Please use your existing account. You can use the "Forgot Password" tool to retrieve your user name/password. The user is not able to create an account using that email address.



Your user name is alro existing account. You name / password.	eady associated with an account. Please use your can use the 'Forgot Password' tool to retrieve your user
+ Return to Sign In	
Create Your O	nline Account
Please create a new and easy!	user name and password below a sign in. Sign up is fast
User names must: - Be a maximum of 5 - Not contain any spa	0 characters (not case sensitive) ces
Valid passwords mu: - Be no more than 30 - NOT contain any bla	st characters ink spaces or tabs
User Name:	TJONES
Password:	•••••
Re-type Password:	•••••
Please supply us w Please note that all	th some additional information about yourself:
First Name:	Tom
Last Name:	Jones
Email Address:	tjones@yourschool.com
Phone Number:	555-555-5555
Date of Birth:	01/01/1995
(mm/dd/yyyy)	(Why do we ask for your date of birth?)
	Create Account
For other sign in assi call us at 601-853-38	stance, please email us at test1@senior-systems.com, or 33.
+ I Forgot My User Nan	ne/Password

Auto-Assign WebIDs and Passwords for users without an Email Address - The Auto-Assign Web ID process has been enhanced with the option to generate WebIDs and passwords for My BackPack users who do not have an email address in their record. This new feature is helpful for users who do not have an email address, but still require a My BackPack user account, such as lower school students. The enhancement can be used for Students, Parents (Current and Applicants) and Alumni. You will not be able to use this new feature for Faculty, LDAP users, Summer School and Online Admissions users.

In System Administration, click **My BackPack** > **Auto-Assign Web User** and select the option that corresponds with the user(s) who need a WebID and Password, but do not have an email address on file. The options to choose from are **Constituents**, **Parents (Current)**, **Parents (Applicant)** and **Students**.

On Step 2 of the **Auto-Assign Student Web ID** wizard, click the **Set all passwords to:** radio button, and enter the password that you would like to use.

Queru conditions	[410]
query conditions	(All)
Sorting conditions	(Default Sort) 🔹
🔲 Override existing	g Web ID's 👘 Use next year's information
Reset Ma	il Sent Date
asswords	
🔿 Allow LDAP Log	gin 🔰
🖱 Generate Rand	lom Password
Send Nev	v Account Notification broadcast email to all new users.
Set all password	ds to:
🗖 Set Password to	o expire (and be changed) upon first login
	and the second

Continue through the **Auto-Assign Student Web ID** and generate the report. When the process is complete, you can provide these new users with their Web ID and password verbally or through some other means.

The following 3 preferences should be set as follows for the Auto-Assign functionality to work as intended:

- Enable check for existing user account for new MBP users? = N
- Require that new MBP users have a unique email address. = N
- Remove email requirement for setting and resetting MBP account passwords? = N

User Statistics

Current User Count has been added to the About My BackPack page - The About My BackPack page has been enhanced with a new Current User Count field, which allows you to see how many users are currently logged into My BackPack.

E About My BackPack			
Build Date and Time		:	Monday, June 8, 2015 3:57 AM
Database Version	Current User Count	:	929
Database Last Update		:	Thursday, May 28, 2015 1:54 PM
FormBuilder Build Date and Time			Monday, October 13, 2014 11:58 AM
Current User Count		:	1

Using Google Analytics for My BackPack

The **About My BackPack** page provides your school with the ability to track Google Analytics information. On the **About My BackPack** page, there is an area called **Tracking code is dis-played here**. This is the area where you enter the code that is provided to you through the Google Analytics website.

<script></script>

Retrieving your Google Analytics code:

To retrieve your Google Analytics code, you must first create an account on the Google Analytics website (<u>https://www.google.com/analytics</u>). Once you have created your account, you can then follow these instructions to retrieve the code that you will insert into the **About My BackPack** page:

https://support.google.com/analytics/answer/1042508

On Step 10, click the Get Tracking ID button:

TestURL		
Website URL		
http:// 👻	testurl.com	
Select One - Reporting Tin United States	re Zone ▼ (GMT-0000) Pacific Time ▼	
This account	has 1 property. The maximum is 50.	

You'll now be able to select the **Tracking Code** menu item in the **Tracking Info** area of the **Property** column.



Copy and paste this code into the **About My BackPack** > **Tracking code** area. Remember to enter the two additional lines indicated in the image below which are:

var USER_ID = 'MBPUSERID'; and ga('set', '&uid', {{USER_ID}}); // Set the user ID using signed-in user_id.

Tracking code is displayed here.	
<script> var USER_ID = 'MBPUSERID'; (function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r] function(){ (i[r].g=i[r].gll[]).push(arguments)}.j[r].j=1*new_Date():a=s.createElem_en</th><td>These two lines are not provided through Google Analytics. You'll need to enter them yourself.</td></tr><tr><th>m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentN/ de.i })(window,document,'script','//www.google-analytics.com/analytics','g ga('set', '&uid', {{USER_ID}}); // Set the user ID using signed-in user_ic</th><td>a); a);</td></tr><tr><th>ga('create' 'enter_tracking_code_number_here', 'auto'); ga('send', 'pageview'); </script>	acking Code number is provided

EXAMPLE CODE:

```
<script>
var USER_ID = 'MBPUSERID';
```

```
(function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r]||function(){
(i[r].q=i[r].q||[]).push(arguments)},i[r].l=1*new Date();a=s.createElement(o),
m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore
(a,m)
})(window,document,'script','//www.google-analytics.com/analytics.js','ga');
```

```
ga('set', '&uid', {{USER_ID}}); // Set the user ID using signed-in user_
id.
ga('create', 'enter_tracking_code_number_here', 'auto');
```

```
ga('send', 'pageview');
</script>
```

Once you enter your Google Analytics code here, this places the code on every page of My Back-Pack and records data in your Google Analytics tracking account. It is important to note that the actual MBPUSERID never appears anywhere, on any report, and is not available on your tracking account. The data is used to track user patterns, not individual users. Once you have created your Google Analytics account and entered the code into **About My BackPack**, you can begin tracking user activity events in Google Analytics.

FormBuilder Enhancements

Country field added to Address option in FormBuilder - The **Country** field has been added to the **Address** option in FormBuilder.

Save *	Save As				, /	Ŵ	
Line	Save * Save As ne Paragraph mple Text Title heck Boxes Date rop Down E Email uith-Line Text Multiple Choice uither Multiple Choice ignature for Tone ignature for Tone ime Description Country Description Cou						
Simple Text	🗹 Title	* Street Address					
Check Boxes	🔟 Date	Address Line 2					
Drop Down	Email						
Multi-Line Text	Multiple Choice	* City	* State / Province / Pegian				
3 Number	Phone	City		-			
Signature	Text Box	t Deatel / Zin Cada	et Address				
	Website	Postal / Zip Code	Country				
Address	Full Name						
Q Form Preview	PDF Preview						

PDF Refresh Tool - For troubleshooting purposes, there is a new option in the Form Manager. When you are reviewing form response PDFs, there is a new button to Regenerate PDFs. This button allows you to regenerate some or all of the PDFs associated with that form.

Resource Center

The new Resource Center allows your school to define links to pertinent websites and embed them directly on the My BackPack landing page. Using this new feature, your school can provide easy access to the external websites most commonly accessed by your My BackPack users.

Resource Center Display

Up to five Quick Links appear in the Resource Center area of the My BackPack landing page. The resource center title and links are totally customizable, and you can control which users see what - meaning that you can provide different resources for Faculty and Parents, for example. The links you have set up and brief descriptions will display in the sidebar menu with a header either of Resource Center or an alternate title (you can customize this title). Users can access the full Resource Center, with all Quick Links and custom text for their corresponding communities, by clicking *More >*.

Home		Middle School 🛭 🍨 💥
My Students View Attendance View Students	My Classes Class Attendance Daily Gradebook	Message Center Test Calendars Click here to view the calendars
Student Discipline	Homework Discipline My Schedule	Useful Links Our Facebook Page Check out our Facebook page! School District Homepage Elections, Policies, Etc.
My Reports	Email My Classes	More >
Grade Entry Sheet Progress Gradebook	My Email Templates Sent Email History Progress Report Settings	Settings My Profile Custom Dictionary
Student Schedule		Faculty Preferences My Documents
Academic Info Student Schedule	My Forms/Documents Admissions Applications	Back to Admin User
Student Attendance Marking Period Grades and Comments Daily Assignments and	My Documents Useful Links	

Full Resource Center

Users can click **More** > to access the Full Resource Center. The full view displays all Quick Links available to the user (only the first five will appear on the landing page). Below the Quick Links, the Additional Resources center will display custom text for all relevant user communities.

seful Links	
Quick Links	
Our Facebook Page	
Check out our Facebook page!	
School District Homepage	
Elections, Policies, Etc.	
Additional Resources	
Applicant	
Include additional links, or information here.	
. Format	
• Text	
As Needed	
• <u>Needed</u>	
SeniorSystems	_
Faculty	
The information here may be of use to faculty members.	
Parent	- 1
Include additional links, or information here.	
• Format	
• Text	-

Resource Center Setup

Access to the Resource Center itself does not require a security key. Similar to the Message Center, if anything is published to a user (based on the user's community), the user will see the Resource Center.

Access to the Resource Center Setup area is controlled by an admin security key. Add this key to any user groups who need access to this area.



The Resource Center Setup page gives you access to a number of functions:

- 1. **Display Resource Center** Controls whether or not the Resource Center is visible to your users.
- 2. **Alternate Title** Customize the title of the Resource Center area as it appears to your users. By default, the title is "Resource Center".
- 3. **Quick Link Grid** See at a glance all of the links you have built. you can see the link title, URL, description, and the user group(s) who can see each link.
- 4. Legend These color codes tell you at a glance which users can see your links.
- 5. **Tools** Use the "Active" checkbox to toggle links on and off, use the "Edit" button to modify the link title, description, and URL, and use the "Delete" button to remove the link.
- 6. **Move** Use these buttons to control the order of your Quick Links.
- 7. Add Quick Link Add a new Quick Link.
- 8. Templates Similar to Community Pages, these templates give you access to a WYSIWYG editor. You can add text, images, links, or any other information you want to show your users to a template. There is one template per community. If a My BackPack user is a parent, he or she will only see the "Parent" template. A faculty parent user will see both the "Faculty" and the "Parent" template. Templates can be marked as Active (or inactivated when they are not needed). You can Preview, Edit, Copy, and Delete templates.
- 9. Add New Template Use this button to add a new template.

Display Resource Center Alternate Title: Useful Links	Apply		 Applicant Student Parent Alumni 	Program Registrant Faculty Administrator
Quick Lin	k Description	Group	os Active	
Our Facebook Page http://www.facebook.com/YourSchool/	Check out our Facebook page!	• • •	•	ø x
School District Homepage http://www.schooldistrictpage.com	Elections, Policies, Etc.	••••	•••	Ø X
Town Sports Schedule http://www.localtownsportscalendar.com	When are your local sports teams playing and wh	ere?		Ø ¥
Add Quick Link				6
Templates				
Group		Active	Action	
Applicant		Ø	🔍 🖋 🗎	:
Parent				

Quick Links

For each Quick Link, you can define the destination URL and corresponding display text and description, as well as make the Quick Link Active or Inactive. Use the **Groups** checkboxes to determine which My Backpack user communities will see the Quick Link.

Add/Edit Q	iick Link	×
		🗹 Active
Display Text	Our Facebook Page	
URL	http://www.facebook.com/YourSchool/	0
Description		
Check out our	Facebook page!	
Crowns		
Groups		
Applicar	t 🖉 Drogram Registrant	
Student		
✓ Parent	Administrator	
✓ Alumni		
Save Done	Cancel	

Hint: Click the **(a)** icon to test your Quick Link before making it available to your users.

Resource Center Templates

In order to accommodate any additional information, documentation or direction that you would like to provide to your My Backpack users, the full Resource Center will display a block of customizable HTML text, using similar functionality to the WYSIWYG editors in the Student/Parent Community and Documents Page Setup.

Add/Edit Template			Senior Syste	ms 🏦 🕈 🗙						
Back to Resource Center Setup										
			Save	Done Cancel						
Group: Applicant ▼ ✓ Active Additionnal Resources: Preview Mmm. 🖄 B I U Asc E E E E E 4 Normal line sp. P X □ 2 □ 2 □ 2 □ 2 □ 2 □ 2 □ 2 □ 2 □ 2 □	Group: Applicant ▼									
⊠ ⊒ ⊒ 3 ⁻ 3, ⇒ ¹ /m m ² ¥ ⊞ ⊟ − 2 [Ⅲ 3	<2 x ² 🙂 🔲									
Include <u>additional links</u> , or information here. • Format • Text • As • Needed Path: p Save Done Cancel										
Online Documents										
Name UF	L	Туре	Action							
Add Web Page Add Document										
Back to Resource Center Setup										

Online Giving

Online Giving has been significantly enhanced to allow many more options and customizations for your online giving pages. Here are the major new features:

- **Multiple giving pages** You can build an unlimited number of online giving pages for both My BackPack users (prompting constituents for their credentials) or the general public (pages that do not require My BackPack credentials).
- **Show/hide fields** You can choose to show and hide some of the fields on your online giving form.
- More customization options You now have even more areas to enter custom text, images, links, and more!

<u>Setup</u>

The Online Giving Setup page has changed significantly to offer new tools and features.

- 1. **Public Pages, Registered Donor Pages** Toggle between tabs to see lists of your pages. Upon database update, there will be one page for each type (your existing Registered and Unregistered pages). You can add any number of pages, customized for certain campaigns, events, funds, or anything else.
- 2. **Select Primary Link** Use this button to control which is the "primary" online donation page, for each type.

For "Public" pages - Primary acts as the default page users arrive at in cases where they use an old or inactive link (they are automatically brought to the Primary page). For Registered Donor Pages - Similarly, if users try to access an old or inactive link, they will arrive at the page designated as Primary. Additionally, the Primary page is the page your users will reach by clicking the donation link in the My BackPack navigation menu.

- 3. **Pages** This grid lists all of the pages you have built. You can see the page name, description, and link and you can copy/paste that link to make it available elsewhere (embedded in an email or web page, for example).
- 4. **Primary & Active Checkboxes** These checkboxes show you page status at a glance.
- 5. **New** Click to add a new page.
- 6. Preview, Edit, Copy, & Delete Use these buttons to work on existing pages.

Publi	ic Pages	Registered Dono	Pages							
Add or edit online giving pages to display custom content to your constituents. Each page have custom options, including whether it is public or accessible through a My Backpack login, what fields are viable and required on the onine giving form, and HTML formatted context.										
Selec	ct Primary L	ink Page Name 🗧	Description +	Link e	Action					
Selec	ct Primary L	nk Page Name ↓ Online Fund	Description •	Link • https://qawebapp03/SeniorApps/onlineGiving/OnlineFund	Action					
Select Primar	ct Primary L Iry Active?	Page Name 🔹 Online Fund Online Gift	Description •	Link e https://qawebapp03/SeniorApps/onlineGiving/giving/OnlineFund https://qawebapp03/SeniorApps/onlineGiving/giving/OnlineGit	Action					

New Giving Page

When you build a new giving page or modify an existing page, you have three areas of customization:

- Settings
- Field Options
- Custom Text

<u>Settings</u>

On the **Settings** tab, you can set the **Active**, **Public** or **Primary** checkboxes.

- 1. Active Note that in order for the page to be available, it must be marked as Active.
- 2. **Public** Check this option to make this URL available to the public. This means that constituents will not log in with their My BackPack credentials to make a gift.
- 3. **Primary** Check this option to make this page the Primary giving page. There are two primary giving pages, one Public and one Registered. In order to mark a page as Primary, it must be Active.
- 4. **Title** The text you enter here will appear as the page title.
- 5. **Description** This is an internal-only description. It will NOT appear to your users. You can use this field to describe your page.
- 6. **URL** When you build your page, the URL to reach the page will be listed in this field. This is a read-only field. You can copy/paste the URL from this field into emails or other pages as needed.
- 7. **URL Customization** You can customize the URL of the page to make it "friendly" and reflect the nature of your campaign effort. Please note that special characters and spaces cannot be used here. By default, this field will pre-fill with your page title.
- 8. **Created and Last Updated** These read-only fields track when the page is created and modified.
- 9. **Campaigns** You can choose to show or hide a dropdown for users to select where their gifts should be used. If you choose to show Campaigns, you can select which Campaigns are available (or you can allow all campaigns to appear).

- 10. The settings for Registered Donor Pages are similar to the options for creating new Public Pages, with the exception of being able to select Appeals, in addition to Campaigns.
- 11. Save, Cancel Click to save your changes, or return to the Setup page without saving.

	三 Online Giving Setup: New Page	
	Back to Online Giving Setup	la com
	Settings Field Options Custom Text	A COLOR
	Page Settings	101-1
1	Active? 4 Title:	-
3	Primary? B URL:	Ľ
	URL Customization:	7
	8 Created: By: MBP Last updated: By: MBP	{
	Gift Options	-
	Campaigns Optionally, provide choices for constituents who want their gift to go towards a certain campaign. You can select certain campaigns to will appear on the giving form, or allow constituents to pick from all campaigns.	
9	 Show campaigns Do not show campaigns 	
11	Save Cancel	
-	Back to Online Giving Setup	1
4	[™] ₩₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽	4
	Gift Options	
	Campaigns Optionally, provide choices for constituents who want their gift to go towards a certain campaign. You can select certain campaigns to will appear on the giving form, or allow constituents to pick from all campaigns. Show campaigns Select Campaign Select Campaign	
10	Appeals Optionally, provide choices for constituents who want their gift to go towards a certain appeal.You can optionally select certain appeals to will appear on the giving form, or allow constituents to pick from all appeals Show appeals Select Appeal Select Appeal Select Appeal	
	Save Cancel Eacto Chine Giving Setup	

Field Options

Use the **Field Options** tab to control what your online constituents will see on their giving form.

- Show This option controls whether or not this particular field is shown on the giving form. You can choose to hide extraneous or unnecessary fields. You will notice that if you want to mark a field as "Required", it must be visible on the form. You will also notice that some fields used to collect critical information are required by the system, and cannot be hidden.
- 2. Required You can mark fields as "Required". You will notice that some fields are required by the system.
- 3. Field Label The name of the field as it appears by default is listed here.

- 4. Custom Label Use this field to customize the field label as it appears on the giving form.
- 5. Default Value Use this field to pre-fill the form with a default value (for example, if most of your constituents are local you may want to pre-fill the State field).
- 6. Save, Cancel Click to save your changes, or return to the Setup page without saving.

Se	ttings Field	Options Custo	m Text		
G	iving Details				
	Show?	Required?	Field Label	Custom Label	Default Value
\geq	V		Title 4		
			Suffix	5	
	☑ 2 >	V	First Name		
			LastName		
			Maiden Name		
	V	☑ (3)	Address		
			Address 2		
	V		City		

Custom Text

Your giving pages give you new areas for entering custom text, images, links, and more, throughout the giving form.

Headder Ten Name Frei Name Frei	ample	
	Header	
See	Title •	
ren town compare townsom ren town compare townsom ren town	Suttix -	
Lester	* First Name	
Additional info	* Last Name	
August and a second and a	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Autor was generative and	Carendae Devaluement +	
Automotive Additional info Matching Info Matching Info Matching Info Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpart Foodpa	* Fund Annual Fund -	49
Additional info	* Amount	
Marcel and a second and a seco	Make my donation anonymous 🖽	About Link
Additional info Additional inf	(i) Learn more about plang	-AUNI LINK
Additional info	In Honor at:	
Additional info	in Memory at:	
Matching Info	Additional info	
Matching Info		
Matching Info		
And easy And easy and and and and and and and and and and	Matching Info	
Adema Carlos Car	Matched by	
co Provide Antonia Provide Antonia Provide Antonia Fronter Fronter	Address	
raying by United Later (a) Paring by Contact (a) Paring by Contact (a) Paring by Contact (a) Paring by Contact (a) Find the Contact (b) Find the Con		
real of the second seco	City	
rang ay unan una Reservation Paring by 6-Dock: @ <u>Reservation</u> Footer		
nenga go volanciana 👷 Penga go volancia Penga go volanciana Penga go volancia	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
Received of the second of the	Paying By Great Gara:	
Paying By aCheck: dd Franciscana Fuoter	Paying By Credit Card	
Prinstancesian Footer	Paying By eCheck: 💉	
Footer	Paying Dy eCheck	
	Footer	

Use the Custom Text tab to add these areas as needed.

- 1. View Sample Layout Click to view where each custom text area appears on your form.
- 2. Active You can mark sections of text as active/inactive as needed.

- 3. **Section** The sections available are Header, About, Matching Information, Additional Information, and Footer. You can use all, some, or none of these sections.
- 4. **Action** Click to edit each section. Editing the section leads you to a WYSIWYG editor, where you can enter and format text, images, links, and more.
- 5. Save, Cancel Click to save your changes, or return to the Setup page without saving.

Back to	Back to Cnline Giving Setup: New Page								
Setti	ings Field Options Custon	Text							
Add or	r edit a block of custom text below.								
1 Unsur	re of where your text will appear?	View Sample Layout							
	Active?	Section	Action						
2		Header	Ø						
		About	9						
	3	Matching Information	8						
		Additional Information 4	9						
		Footer	8						
Save	Save Cancel								
Back to	Online Giving Setup	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~							

Academic Office Enhancements

Salutation formats updated with "The" and "Family" - Field names for "The" and "Family" have been added to the **Administration Maintenance** > **Address/Salutation** tab in the Student/Parent Address application.

dd Before Add Afte	r <u>D</u> elete Cut R	ows	<u>C</u> opj	Rows Paste Rows					
	Field Name	_	Initial	Include Space After	Ignore Before	Ignore Type	Ignore After	Ignore Type	
Name2 Last Name Name2 Suffix Family ID. Job Title and & ; The Family									
wiew							ОК	Can	cel

Emergency Contact Report - A new Emergency Contact Report has been added to the Student/Parent and Registrar applications. This report provides Student Emergency Contact information such as the Full Name/Business, Phone Number and Relationship of the Emergency Contact.

🖪, Emergency Contact Report				
🔮 🚝 🔣 к 🔸 🕨 👘	1 /1+	🖥 🖪 🎢 100% 🔻		Business Objects
Preview				
🗈 Simon, Paul 🔺				· · · · · · · · · · · · · · · · · · ·
E Stephens, Mike				
Trueman, Sue			Emergency Contacts	
Tanders, Carol			9/4/2015	
Williams, George			5/4/2015	
	Grade	Full Name / Business	Relation	Phone
	5	Simon, Paul (Paul) Mr. and Mrs. Tom D. Simon	Father, Mother	555-444-6666 777-222-1111 (Cell)
	6	Stephens, Mike (Mike)	Father	444-232-9999
	1	Trueman, Sue (Sue)	Mother	234-4394-3344 909-093-2343 (Cell (M))
	3	Tuttle, Marsha (Marsha)		
	7	Vanders, Carol (Carol)	Mother	798-090-0889 (Cell (M))
	9	Williams, George (George)		987-909-2333 (Cell (F))

Progress Report Date Range - A new **Progress Report Viewable to Parent/Student** area has been added to the **Progress Report Options for Student/Parent Community** page. In this new area, you can select the **Always Visible** radio button to make Progress Reports always visible to Students and Parents (by default, this option is selected). You can also select the **Select Visibility Date Range** radio button and specify a specific date range in which Students and Parents can view Progress Reports.

E Progress Repo	rt Options for Studer	nt/Parent Community	Mr. Tom Jones MS/HS	۵ 🕲 🚯
Gradebo	ook Name	Progress Grade		
(704_01) Graphic Comm.	[9W-1,9W-2,9W-3,9W-4] [5]	9W-1-First 9 weeks 🔹		
(704_02) Graphic Comm.	[9W-1,9W-2,9W-3,9W-4] [4]	9W-1-First 9 weeks 👻		
(714_02) Graphic Comm I	I [9W-1,9W-2,9W-3,9W-4] [5]	9W-1-First 9 weeks 🔻		Ĩ
Progress Report Viewable to Parent/Student: Grades Between:	 Always Visible Select Visibility Date 01-01-2015 04-17-2015 04-17-2014 and 	Range		
Show:	04-15-2015 Imm - Assignments Group Summaries Missing Work	 ✓ Grade Key(s) ✓ Special Scores ✓ Class Description 	_	

Student Media in My BackPack - Faculty users can now access student media files in My Back-Pack. These are the same files available on the Media tab of the student record in Advantage (Registrar, Dean's, Accounts Receivable). The documents available to a user in My BackPack depend on media security groups. When you set up media security groups, you will notice that you can now grant My BackPack user groups access to documents (previously, you could only select Advantage user groups). In order to see a file in My BackPack, the user (faculty, staff, or admin) must be a member of one of the security groups associated with the document. This is particularly useful in cases where faculty might have access to My BackPack (through an IPad, laptop, or other device) but no access to Advantage.

NOTE: Upon database update, no user will have access to media in My BackPack. You will need to modify or set up media security groups to add My BackPack user groups to media security groups.

📰 Student Directory - Details		Upper School 🚷 🔞 🔇
Back to View My Students		
Filter: All Students 🗸 Student: 🗇	v .	÷
Student Family Schedule Documents (1)		
Document +	Name + Folder +	Published Date -
2015 Field Trip Info Sheet		
Back to View My Students		
Printable	Version	

Medical Tab Enhancements

Release 92_9 introduces significant new features for tracking medical-related information in Advantage. The new features are found on the Student record in the Registrar, Accounts Receivable, Summer School and Dean's Office applications. These features are designed to improve your ability to organize and track critical data related to student health.

		Condition	Severe	Allergy		Detail	Treatment		Dosage	Diagnosis
	V A:	sthma			detail test		4	do:	sage test	01-01-2001
F	Physica	Exam/Screening		06-0	Date 01-2014	Passed			Ne	w
	Dhusiaal	Exam/Screening		000	Date	Passed	Result	Archive		
									Dele	ete
						•		•		
						• •				
				ļ				ļ		

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Conditions

The Conditions area of the Medical tab is fixed (while the lower area changes based on which subtab you select). You can see any conditions or allergies the student might have.

- 1. Allergy and Severe Condition warning If the student has allergies or severe conditions, the system will display warnings in red text.
- Show Use this dropdown to show conditions and allergies: All for Student - Shows all allergies and conditions active for this student. All available - Shows all allergies and conditions. Use this option to show all possible items and add items to the student's record. Student allergies only - See all the student's allergies at-a-glance. Severe conditions only - See all severe conditions at-a-glance.
 Conditions only - See all severe conditions at-a-glance.
- Conditions Grid Shows conditions. By default, this grid only shows the student's conditions.
- 4. **Checkbox** Check to add conditions to the student's record.
- 5. **Severe** Use this checkbox to indicate whether the condition is severe. This activates the warning red text at the top of the screen.
- 6. **Allergy** This checkbox is set up in Code Maintenance. It provides an easy way to scan the list and identify allergies quickly.
- 7. **Details** You can enter additional information about the student's conditions.

	==				Stu	dent N	Maintenance - (Sophie	Kathry	n Williams)			×
	Name /	Address	Info1 Info2 All	Accts. R	egistrar	Schedu	le Grades History GPA/Ran	k Attend	lance Program Medi	cal Media Custom	Comments V	Veb ID
	Med	1	ata Student H	as Aller <u>c</u>	jies (Studen	t Has Severe Condition	2	Show: All for S	tudent	× 9	
3			Condition		Severe	Allergy	Detail		Treatment	Dosage	Diagnosis	
~	<u> </u>	v	ADHD	5	> 🗹						<	7
	4 >	 I 	Asthma								ļ	
		•	Seafood		5 >	✓						v
	Physic	al Exan	ns/Screenings Tre	atments	Inoculati	ons En	nergency Contacts Physicians	Insuran	columnation			

Conditions can be set up in Code Maintenance. Upon database update, you will see several system defined conditions. You can add, remove, and edit conditions in **System Administration > File > Code Maintenance > Health Condition**.

-8	Code Maintenance	- 🗆 🗙
Codes		
Select a code Health Condition	1	~
Condition	Allergy	∧ New
ADHD	N	
Ant Bites	Y	Delete
Antbites	Y	
Aspergers	N	Print
Asthma	N	
Asthma, Seasonal	Y	
Broken arm	N	
Cashews, Pistachios	Y	
Cut	N	v
Access Level Editable for ALL	✓ OK	Apply Cancel

Physical Exams/Screenings

The Physical Exams/Screenings sub-tab is designed to track specific types of information related to the student. This area can be customized to suit your particular needs and workflows. You can archive items to store data year over year. To see previous years' items, click the "Show Archived Exams" checkbox at the bottom of the screen.

Exam/Screening	Date	Result	Archive
Hearing	04-30-2015	Pass	
Height	04-30-2015	55''	
Vision	04-30-2015	Pass	
Weight	04-30-2015	77 lbs	

Exams can be set up in Code Maintenance. Upon database update, you will see several system defined Exams. You can add, remove, and edit Exams in **System Administration > File > Code Maintenance > Health Exam**.

 ^	New
	Delete
	Die
	Print

Treatments

The Treatments sub-tab gives you an area to store various treatment types and whether or not the parent/guardian has granted permission to administer each treatment, as well as a treatment log.

- Treatment, Permission Indicate which treatments parents/guardians have granted permission for the school to administer to their student. You can define a list of common treatments in System Administration > File > Code Maintenance > Health Permission.
- Treatments You can keep track of any treatments administered to the student here. Treatment Types, Conditions, and Priorities can be defined in System Administration > File > Code Maintenance.

	l reat	ment			Permis	sion 🔺		
Administer Aceta	aminophen				✓			
Administer CPR					✓			
Administer Ibupr	ofen				✓	~		
Accident	Cut	Priority priority1	I reatment Band aid	02-28-2015	Expire	Hecv Y	Notes Playground accident	N
Accident	Cut	priority1	Band aid	02-28-2015		Y	Playground accident	Ne
	Asthma Seasonal	priority1	Inhaler	02-21-2015		ļ Y	Asthma attack	 De
Condition	Astrina, Seasonar							
Condition HEPA1	Astrina, Seasonal			02-27-2003		Υ		

IMPORTANT: Previously, the Medical tab consisted of only the information found on the Treatments sub-tab, in the Treatments grid. Any existing data on the Medical tab is stored here, exactly as it appeared previously.

Code Maintenance	- 🗆 🗙	Code Maintenance -	×
Codes		Codes	
Select a code Health Permission	¥	Select a code Health Priority 🗸	
Permission	New	Priority	New
Administer Acetaminophen		priority1-80	
Administer CPR	Delete	priority2-90	Delete
Administer Ibuprofen	Dia		Dit
Call Ambulance	Print		Print
Contact Doctor			
epi pen			
inhaler			
	••••••••		
	-6		
Access Level Editable for ALL VOK	Apply Cancel	Access Level Editable for ALL V OK Apply	Cancel



Inoculations

Use the Inoculations sub-tab to track the student's vaccination records or other time-sensitive data.

culations						
Inoculation	Date 1	Date 2	Date 3	Date 4	Date 5	
Flu	10-30-2014					Ne
Нер С	07-14-2009	•				D
Measles	07-30-2007	•				 De
		•				

You can keep track of multiple dates per inoculation. Inoculations can be defined in **System Administration > File > Code Maintenance > Health Inoculation**.

Code	3		
Selec	t a code	Health Inoculation	
		Inoculation	New
F	lu		
H	ер С		Delete
M	leasles		
fl	u		
m	ieasles		
	F		

Emergency Contacts, Physicians

Addresses marked as emergency contacts are available here, giving you an easy way to see this information at-a-glance. Similarly, the Physicians sub-tab gives you a way to add and view the student's physicians at-a-glance.

- 1. **Emergence Contacts** You can see a list of the student's emergency contacts.
- 2. **Checkbox** Optionally you can choose to "Show all contacts".
- 3. **Preview** You can preview the contact information for the selected name in the grid.

_						1	1	Telephone Num	nbers	
5	EU	John Williams	Name		Other		N	Tel No:	555-555-4466	<
							New	Fax No:		
							Edit			
	_ Sho	w All Contacts								
- C	Sho	w All Contacts								
- C	Sho	w All Contacts	Тур	e e	Notes			Telephone Numbers	214 200 2009	
hysic	_ Sho cians	Name ger Scholer	Typ	e Student	Notes s grandfather		New	Telephone Numbers Tel No: Fax No:	214-368-3659	<

Insurance

You can keep track of any insurance data for the student on the final sub-tab.

🔽 As	Condition thma	Severe V	Allergy	detail test	Detail	4	I reatment	Dosage dosage test	Diagnosis 01-01-2001
ysical Exams. Irimary Provider	/Screenings Treatments	Inoculat	ions Er	nergency Cor	ntacts PI	nysicians Ir Secondary Provider	Surance	4	
Policy No. Group No. Member ID	11111111111111111 222222222222222222222222222222222222	2				Policy No. Group No. Member ID	44444444444444444444444444444444444444	F 5	

Dean's Office

Date Range for Daily and Class Attendance - Dean's Office now gives you the ability to select a Date Range to import Daily Attendance and Class Attendance. Previously, you could only import Daily and Class Attendance by the current day.

To Import Daily or Class Attendance:

1. In the Dean's Office application, click **Daily Attendance** or **Class Attendance** and click **Import**.



2. Click **New** and select an Attendance entry method (**By Advisor**, **By Homeroom**, **By Class Period** or **By Student**).

NOTE: If you select **By Student**, Section Id is not required in the .csv file that you are using to import attendance.

Date	Faculty	Course Name / Section LD	Student I.D. / Name	Туре
	Attendance Import			
	Attendance entry met Date Range Option Items to be imported 	hod By Homeroom By Advisor By Homeroom By Class Period By Student Range for Daily mport:	07-01-2015 and 07-30-2015	
Only show	1 files selected to be	processed.	ОК	Cancel

3. The **Select Date Range for Daily Attendance Import** area defaults to today's date. You can edit this date range as necessary.

Attendance Import Attendance entry method By Homeroom Date Range Options Files Items to be imported Select Date Range for Daily Attendance Import and Bis selected to be processed. OK Cancel instructure Cancel Control Cancel	Date	Facultu	Course Name /	Student LD /	Tupe
Attendance Import Attendance entry method By Homeroom Date Range Options Files Items to be imported Select Date Range for Daily Attendance Import and Bis selected to be processed. OK Cancel Cancel Cancel Cancel Cancel Cancel Cancel C	Date	racuny	Section I.D.	Name	Type
Attendance entry method By Homeroom Date Range Options Files Items to be imported Select Date Range for Daily 07-30-2015 Attendance Import: and 08-30-2015 3 files selected to be processed. OK Cancel in Dry show his Import Entries for this Import		Attendance Import			
Date Range Options Files Items to be imported Select Date Range for Daily 07:30-2015		Attendance entry me	hod By Homeroom	•	
Items to be imported Items to be imported Select Date Range for Daily O7-30-2015 and O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for Daily O8-30-2015 Total Select Date Range for		Date Range Option	ns Files		
Select Date Range for Daily 07-30-2015		Items to be import	ed		
3 files selected to be processed. OK Cancel		Select Date Attendance	Range for Daily Import:	07-30-2015 and 08-30-2015	
his Import Entries for this Import	🔲 Only sho	3 files selected to be	processed.	OK	Cancel
	his Import			Entries for this Import	

4. The Attendance entries appear in the table. If any entries are red, you will need to delete them or correct them. When all entries are black, click **Post** to post Attendance to the student record.

GAMM01123 Late
Gammor, Ted Late Arrival
HAMM01223 Harrold, Neil Present
TDDER01223 Temmor, Fred Present
ons Date 👻

Discipline Entry - The character limit for the **Description** field on the Discipline Entry screen has increased to 2000 characters.

😑 Discipline	: Entry	Lower School	۵ 🕲 🕲 🔕
Back to Discipline - St	udent Search		
Student: Larry Selle Advisor: Jim Warne Academic Year: 20	rs r 016		
* Date:	08-10-2015 Marking Period:		
Section: Section: Section: Section: Reporting Faculty:			
Description:	Larry was chewing gum in class again. He has been told on numerous occasions to not chew gum in class. He has been given a detention. Hopefully he will learn his lesson and avoid chewing gum in class in the future.		
	Character Count: 215 /2000		
Points: Location:			
Section: Reporting Faculty:	Jim Warner Search Clear		
Action:	•		
Back to Discipline - St	udent Search	•	* - required field
Submit Reset	Cancel		

Business Office Enhancements

Printing 1096 Forms - The ability to preview and print 1096 Forms has been added to Accounts Payable. Click the **Preview** button to preview and print the 1096 form.

1099 Forms			The Report Preview		
File Edit				1 /1 🛛 😹 🔂 🏠 100%	T Burlinson Oblaster (8)
Query List			Preview		
Report Title 1099 Forms					
Other Options THIS Calendar Yr, Amt. Laser LAST Calendar Yr, Amt. Dot Matri Make sure the 1099 fo	x are mounted in printer.			Senior Systems Academy 201 Boston Post Road West	
Format Options	096 Summary	22		Marlborough, MA 01752-460	5
Number of SSN/Federal ID digits to disp	1096 Summary Form data Total Misc. Amount \$110,485.55 Total Rental Amount	\$0.00		98979796986 31	
No. of Copies 1 Page Range 1 Current Printer Adobe PDF on Docume	Misc. Forms Count 31 Rental Forms Count Total Medical Amount \$0.00 Total Other Income Amou	0 uni \$0.00			
	Medical. Forms Count 0 Other Income Forms Cou	nt 0			
	1 IGVIEW				•

Reassigning Check Numbers

When printing checks in the Accounts Payable application, sometimes printers jam, checks stick together, there isn't enough check stock in the printer, or the check starting number was not correct to begin with. You can correct these scenarios, if you have not already posted to General Ledger. If you have already posted, 92_9 introduces a new tool to make reassigning check numbers easier.

NOTE: This function is not intended for repeated use - it is always best to verify that your checks are correct before completing the posting in General Ledger. This function is only available to the Schema Owner.

To perform the Reassign Check Numbers process, the schema owner enters the Batch ID that contains the checks that need to be changed. Information for the batch, and for each check in the batch, is displayed for reference. Once the checks are populated in the table, you can assign check numbers as necessary. When you have successfully completed this process, the check numbers in the original batch are replaced with the correct check numbers.

NOTE: This function can be used for any AP checks batch: Regular Check Run, Hand Checks or Bank Drafts. Bank Drafts will display Transaction Numbers rather than Check Numbers.

To Reassign Check Numbers:

1. Log into Accounts Payable as schema owner.

2. Click Maintenance>Administration Maintenance>Accounts.

Accounts Payable	e Administration			
Main G/L Accounts	Help			
School Name Address Line 1 Address Line 2 City, State, Zip Tel. No. Federal I.D.	Westberry Hollow 76 Hollowsford Roa Dairy 23231223234	ad MS ▼ Extn.	99990	Control Information Fiscal Year Ending 2015 Month November Last Batch I.D. 001288 Vendor I.D. Length 5 Last Vendor I.D. 83
State I.D. Tax Exempt No.				Accounts
			- Miscellanec P.O. Admir	n Check Layout Preferences
				OK Cancel

3. On the Checking Account Maintenance screen, go to **Admin Tools > Reassign Check Numbers**.

Accounts Payable	Administration	
File Edit Tools	Help	
Main G/L Accounts	1099-Reporting	
School		Control Information
Name Address Line 1	Checking Account Maintenan	ce 🗆 🗆 🖾
Address Line 1	File Tools Admin Tools He	lp
City, State, Zip	D New Reassign Ch	eck Numbers
Tel. No.	Account Name	Bank Account No. GL Acct. No.
Federal I.D.	2 Jth Grade Account	234232334 112233
State I.D.	10th Grade Account	23255523 1423234
Tau Furmah M	11th Grade Account	32331232 2312233
Tax Exempting	12th Grade Account	32334132 2342312
	11	······································

4. On the **Batch ID** field, enter the Batch ID.

	IMPORTANT!	Positive Pay file	vill NOT be update	ed!
atch ID AP000234	<u> </u>	Create Date 07	29-2015	
heck Date 07-27-2015]	Posting Date 07	29-2015	
osted by M5MANZO		Amount	91.31	
Vendor ID	Vendor Name	Check Amount	Original Check/Trans. No.	New Check/Trans. No.
				-

5. Once the header information is populated, click the **Search** icon to display the Vendors in the table below.

	Mak	e sure there are no other IMPORTANT! F	users processi Positive Pay file	ng checks during t will NOT be upda	his reassignment! ted!
atch ID	APOO	10234	Create Date (07-29-2015	
neck Date	07-27	7-2015	Posting Date (07-29-2015	
osted by	M5M	ANZO	Amount	91.31	
Ven	dor ID	Vendor Name	Check Amount	Original Check/Trans. No.	New Check/Trans. No.
ADVA	N01	Advanced Berkshire Medical	13.13	3080088	3080088
YANK	E01	Yankee Inn Home Comfort	78.18	3080089	3080089
				•	

6. Once the Vendors are populated in the table, you can change the check numbers in the **New Check/Trans. No.** column as necessary:

Mak		Positive Pay file	will NOT be updat	red!
atch ID AP00	00234	Create Date	07-29-2015	
neck Date 07-2	7-2015	Posting Date (07-29-2015	
osted by M5M	ANZO	Amount	91.31	
Vendor ID	Vendor Name	Check Amount	Original Check/Trans. No.	New Check/Trans. No.
ADVAN01	Advanced Berkshire Medical	13.13	3080088	3080088
YANKE01	Yankee Inn Home Comfort	78.18	3080089	3080089

7. Once you have updated the check numbers, click the **Preview*** button to review the changes. Note that you must preview your changes before they can be applied.

ass	ign Check Ni Mak	umbers e sure there are no other IMPORTANT!	^r users processi Positive Pay file	ng checks during thi will NOT be update	is reassignment! ed!	-
latc Cheo Post	ch ID AP00 ck Date 07-2 red by M5M	0234 <u> </u>	Create Date C Posting Date C Amount	17-29-2015 17-29-2015 91.31		
	Vendor ID	Vendor Name	Check Amount	Original Check/Trans. No.	New Check/Trans. No.	
~	ADVAN01	Advanced Berkshire Medical	13.13	3080088	3080084	
~	YANKE01	Yankee Inn Home Comfort	78.18	3080089	3080087	
Ple	ase Preview b	efore clicking Apply		Preview*	Apply Cance	:I

8. If the changes look correct, click the **Apply** button.

	IMPORTANT!	Positive Pay fi	le will NOT be upd	ated!	Sile
tch ID AP000234	<u> </u>	Create Date	07-29-2015		
eck Date 07-27-201	5	Posting Date	07-29-2015		
sted by M5MANZ(2	Amount	91.31		
YANKE01	Reassignment wa Check/Trans. Nu	as successful! Please Imber before printing	be sure to verify the Sta your next check batch.	rting	
				ок	
			•••••		

Your check numbers have now been reassigned. Be sure to verify the starting check/transaction number before printing your next batch.

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Alumni/Development Enhancements

Captcha added for unregistered (public) giving screens - Captcha has been added to unregistered Online Pledge and Online Donation screens in My BackPack. Captcha prevents unauthorized hacking programs from gaining access to accounts by ensuring that a human is entering the information. The **Enable Captcha check?** system preference in System Administration must be enabled for Captcha to appear on the unregistered Online Pledge and Online Donation screens. Note that this page will only appear on unregistered giving pages. Registered giving pages require My BackPack credentials to log in.

5	yster	n Preferences		1
	_		1	
	App	Description	Value	
	SU	Hide Home and Logout button in MBP.	N	RAHIN
	SU	Enable check for existing user account for new MBP users?	Y	SEt. 1
	SU	Require that new MBP users have a unique email address (only applies if check is enabled, above)	Y	Refresh
	SU	Enable Captoha check?	Y ()	Enter Captcha code below:
	SU	Enable check for existing user account for new MBP users?	Y	

Gift Search Tool

A totally new Gift Search tool has been added to the Alumni Development application to help you easily edit, view, search and export Gift records. This new tool has been added to the **Main-tenance** menu, the **View** menu, and as a **Quick link** icon.



The new Gift Search screen displays a list of Gift Types which you can filter, or you can create your own Constituent or Gift query as necessary.

Search					
📝 Edit 🚺 Options 🕶 📧 E:	xport 👻 🎼 Close				
Query List Select Constituents to display (All) Select Gifts to display (All)		• <u>«</u> • <u>«</u>	Additional Lost / Dec Display Display	Criteria All All Inactive Constituents	•
Options Soft Credits Include All Type [All] Date Range To Eilter Results Soft Key		s I ist			
Type Date 🔺 Gift Type	Amount	Name	I.D.	Campaign	Fund Narr 🔺
P 05-16-2001 Pledge	12,000.00 Carol Jones		000013 D	evelopment	Imagine CC Phase 1 📃
P 07-23-2001 <u>Pledge</u>	5,100.00 Paul Rodgers		<u>000102</u> D	evelopment	Imagine CC Phase 1
P 07-24-2001 Payment	0.00 Samantha Barr		<u>000102</u> D	evelopment	Imagine CC Phase 1
P 08-22-2001 Payment	0.00 Henry Wells		000013 D	evelopment	Imagine CC Phase 1
P 09-11-2001 Pledge	500.00 Carol Hicks		000230 D	evelopment	Imagine CC Phase 1
P 10-01-2001 Pledge	50.00 Barbara Smith		000314 D	evelopment	Imagine CC Phase 1
P 10-08-2001 Pledge	1,000.00 Sarah Smalls		000228 D	evelopment	Imagine CC Phase 1 🚽
<	. :				4
1655 rows returned.				Pres	s Alt-R to jump to the search result

As with other search screens, you click the **Options** drop-down and select **Modify Options**. The Settings window appears. On the Settings window, you can organize the Gift display grid on the **Table Columns** tab or select grid settings on the **Screen Settings** tab.

Double-click a Gift in the grid, or highlight a gift and click **Edit**, to view the gift.

ant		Fiscal Year	Fiscal Month	Details					
Date	10-17-2001	2002 -	October -	Appeal	Annual Fund Fall Letter (2	2014) 🔻	Designatio	n	-
Amount	300	00		Gift Attribute	Math Building Construction	•	NPV Amt.	(0.00
Fund	6			Solicitor	001911	Mr. William	Horhay		
	Imagine CC PI	hase 1		Thank You Lette	ers				
	Anonymou	s Gift / Pledge		Letter 1	Grandparent Thank You		•	Print Date	05-21-2015
Constituency	Employee		•	Letter 2	Athletic Gift		-	Print Date	05-21-2015
Payment				Personal Note	Thank you for your gift				
Method	Check		•	Receipt / Ackno	owledgement				
	Post to Ge	neral Ledger		Receipt Type	Gift Reciept		•	Receipt Date	05-21-2015
Date	05-21-2015	Ref. No.	32342355555444	Receipt Amount	300.00				
Exp. Date	05/16	Bank No	885645453	Personal Note	Thank you for your gift!				
				Media					
				Media			۹,		
Online Giving	Code 456465	346557456					_		

Access to the gift search tool relies on a new set of security keys under the Maintenance and View trees. Add these keys to any user(s) or group(s) in order to give users access to the new gift search tool.



Enhanced Gift Report - The **Gift Attribute** field and the **Total Giving Count** tally at the end of the report have been added to the Gift Report in Alumni Development. This report is located in **Reports** > **Giving Detail Reports** > **Gift Report**.

Report View (Gift Report)								
File View Print Tools								
			Gift Rej	port				Ĺ
July 6, 2015 1:40 I	PM		Westberry	Hollo	W			Page: 1
		All	Constituents All Gifts So	rted by Na	me, Gift Date	•		
CONSTITUENT NAME	Constituency	Campaign	Fund	Date	Туре	Sub Typ	Gift Attribute	All Giving Match
Ms. Dawn Abbott Class Yr : 1988 test@test.com; test2@test.c	com; tes3t@test.com; Alumni	Development	Annual Fund - Golf	05/28/15	Gift		Annual Fund 13-14	50.00
Mr. John Brown 11 Yellow St. Westmount, MS 33220 Class Yr 2006 555-666-7777 test@test.com Mrs. Alex Barnes	Alumni Alumni	Development Development	Annual Fund - Baseball Annual Fund - Weight Ro	03/11/15 03/11/15	Gift Pledge		Annual Fund 13-14	10.00 0.00
23 East St. Charlestown, MD 44550 Class Yr : 2004 666-777-9999	Employee	Development	Annual Fund	08/13/14	Payment		Annual Fund 13-14	24.00

Report View (Gift Report)					0 23
File View Print Tools					
🗟 🍛 - 🕅 ٵ 🏲 🗎					
	G	ift Report			
July 6, 2015 1:55 PM	West	berry Hollow		Page: 41	
	All Constituents All	Gifts Sorted by Name, Gift Da	te		
CONSTITUENT NAME Constituency	Campaign Fund	Date Type	Sub Type Gift Attribute	All Giving Match	
Parent	Development Annual Fund	10/28/14 Gift		1,500.00	
Total Giving 227 Count:	Min -100.00	Max 12,000.00	Avg 525.01	119,178.26	~

Summer School/Programs

Enrollment Maximum Behavior for Summer/Program Registration - A new **Enrollment Maximum Behavior** area has been added to the **Summer/Program Registration** page, on the **Options** tab in My BackPack. This new area keeps all of the functionality that was previously available in the **Summer/Program Registration** page, but also adds two new options that allow you to clear in progress registrations manually and you can also set a timer that will automatically remove in progress registrations after the set amount of time that you specify.

E Summer/Program Registration Setup
Documents Options Online Payment
Options
School: eSchool 🔹 🚺
Enrollment Maximum Behavior: 2
3 💿 Use only Approved Registrations when calculating the max registration limit.
4 🔘 Use Approved and Submitted Registrations when calculating the max registration limit.
5 Superior Submitted, and In Progress registrations (meaning that registration and payment is not yet submitted) when calculating the max registration limit.
🜀 💿 I want to clear In Progress registrations manually (in Advantage Summer/Program Registration).
I want seats held by In Progress registrations to be released automatically after the specified amount of time.
7 Minutes
In Progress Registrations

Field	Description
1	School - The School drop-down lets you select a Division of your school.
2	Enrollment Maximum Behavior - The new Enrollment Maximum Behavior area lets you select the behavior for Summer/Program Registration from the radio buttons below.
3	Use only Approved Registrations when calculating the max registration limit - This is the most popular option for schools using Summer/Program regis- tration. This option only adds the number of Approved Registrations when cal- culating the number of available seats for a class.
4	Use Approved and Submitted Registrations when calculating the max registration limit - This option works the same as the Use only Approved Registrations when calculating the max registration limit option, with the

	exception of adding Approved. Submitted and In Progress registrations together
5	Use Approved, Submitted, and In Progress registrations (meaning that registration and payment is not yet submitted) when calculating the max registration limit - When this radio button is selected, In Progress registrations are taken into consideration during the calculation, and two additional options appear below. See #6 and #7 below.
6	I want to clear In Progress registrations manually (in Advantage Sum- mer/Program Registration) - When this option is selected, Admin users can manually remove In Progress registrations.
	Johnes, Sarah Jewa Jummer 7202015 JS98 Johnes/Upurschool.com Johnes/D
7	I want seats held by In Progress registration to be release auto- matically after the specified amount of time - When this option is selected, any courses selected by parents in the Summer/Program Registration page will automatically expire if they are not paid for in the specified amount of time.
	 Use only Approved Registrations whe Use Approved and Submitted Registr Enter course expiration time here. Use Approved, Submitted, and In Fourier and the second second
	Users can see how much time remains for course registration by the Reservation Time Remaining counter that is located at the top and bottom of the Summer School course registration page:
	Reservation Time Remaining: 02:41

the scre	Vhen the amount of time has expired, the user will see an error message appear of the series that notifies the user that time for source registration has eveloped						
	een mat nounes uie user mat une for course registration has expired						
1-12 1	Portu Timolo un						
	Sony Times up.						
	New whet?						
	Remov						
	Toufor the event same sources right new Your selected sources ware						
12	Try for the exact same courses right now. Your selected courses were:						
	Algebre 1 Deview Cr 0 11						
	Algebra 1 Review Gr 9 11						
	OK Cancel						
C.u	ne nange Grade Level						
Admin	users also have the option of manually removing In Progress registra						
the In F	Progress Registration nage						
	rogress Registration page.						
	S Redistrations						
In Progress	yam Registration Setup						
Back To Summer/Program	vram Registration Setup ummer Programs Citical Selected (0)						
Back To Summer/Program	ram Registration Selue ram Programs Clear Selected (0)						
Back To Summer/Progress School Selection: Su	Aram Registration Selar Arame Select School Updated MBPUser Email Parent1 Parent2 Course Section Cree 1508 Abbreact School Updated MBPUser Section Cree						
Back To Summer/Progress School Selection: Sur Student Ni Johnes, Sarat	Parent's Pare						
Back To Summer/Progra School Selection: Su Student N. Johnes, Sarah Marshal, Paul	All parents Parents <th colspan="6" parents<="" td="" th<=""></th>						
In Progress Back To Summer/Progr School Selection: Su Student Ni Johnes, Saral Marshal, Paul Williams, Nick	Parents of Seluce Parents Parents <th colspan="6" pare<="" td=""></th>						

We have also added a section at the bottom of the **Options** page that allows you to control how waitlist registration appears for parent/guardian users in My BackPack Summer Registration. You can enter text in the **Waitlist Text** field, which automatically updates the text in the radio buttons. You can then choose the style and appearance of the Waitlist option by selecting a radio button below.

Waitlist Options	S:	
Summer Re	egistration.	waitlisted registrations appear for parent/guardian users in My BackPack
Waitlist 1	Text: Waitlisted	(15 char. max)
Style and	d Appearance:	
⊚ Wa	itlisted	
⊚ Wa	itlisted	
Wa	itlisted	
Note: "Waitl school does	ist" will only appear in pare s not use waitlists, this wil	ent/guardian registration if this option has been enabled in Advantage. If your not appear on registrations.

No specific System Administration security keys are required for this enhancement. Admin users simply need the **Summer School Registration Setup** key and they will automatically have access to this enhancement.

My BackPack Group Maintenance	
Groups - (10) Form Builder Admin MBP Admin MBP Admin Admission MBP Admin Business MBP Admin Online Summer MBP Admin Online Summer Set MBP Admin Registrar MBP Email Blast Super Admin Web Services	Menus Page Access Statistics Online Admissions Setup Online Enrollment Setup Summer School Registration Setup Student/Parent Community Setup Community Pages/Templates Setu Message Center Setup Resource Center Setup Cogin Page Setup About My BackPack Directory Email
4	Lew Group Edit Delete