

# Senior Systems Cloud Services

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# Cloud Services User Guide

This guide offers suggestions and answers to common questions to help you work with Advantage applications in your hosted environment, whether your school has recently begun using Advantage applications, or you have used the applications before but recently moved into the Senior Systems hosted environment.

[Working In Your Hosted Environment](#) offers guidelines for basic tasks, including logging into Advantage applications in your new hosted environment, using your landing page, and working within Advantage applications.

[How To Save Files](#) explains the drive mapping system for saving files from Advantage applications.

[How To Set Up Senior Access To Local Drive\(s\)](#) shows you how to give Advantage applications access to save files on your local drive(s).

[How To Reset Your Password](#) shows you how to change your Citrix password. You can change your password at any time, but you will be required to change it at least every 90 days.

[How To Print](#) explains the basic printing process from within your Advantage applications.

[Paperless Printing Solution](#) explains how to use the Print2PDF tool (automatically available for all your hosted Advantage applications) to create PDF printouts quickly and easily.

[How To Use Citrix At Home](#) tells you what you need to do to use your <https://www.Senior-Anywhere.com> site from home.

[Windows 7: Special Instructions](#) explains a known issue that SOME Windows 7 users may experience, and offers several troubleshooting options.

[Google Chrome: Special Instructions](#) explains a known issue that SOME Chrome browser users may experience, and offers several troubleshooting options.

[How To Set Up iPad Access](#) explains how to access the Senior Systems hosted environment on your iPad.

## Working In Your Cloud Environment

The Senior Systems hosted environment allows you to use your Advantage applications through a web browser. Before you can launch applications, the Citrix Receiver client must be installed on your computer. Select your operating system for installation details:

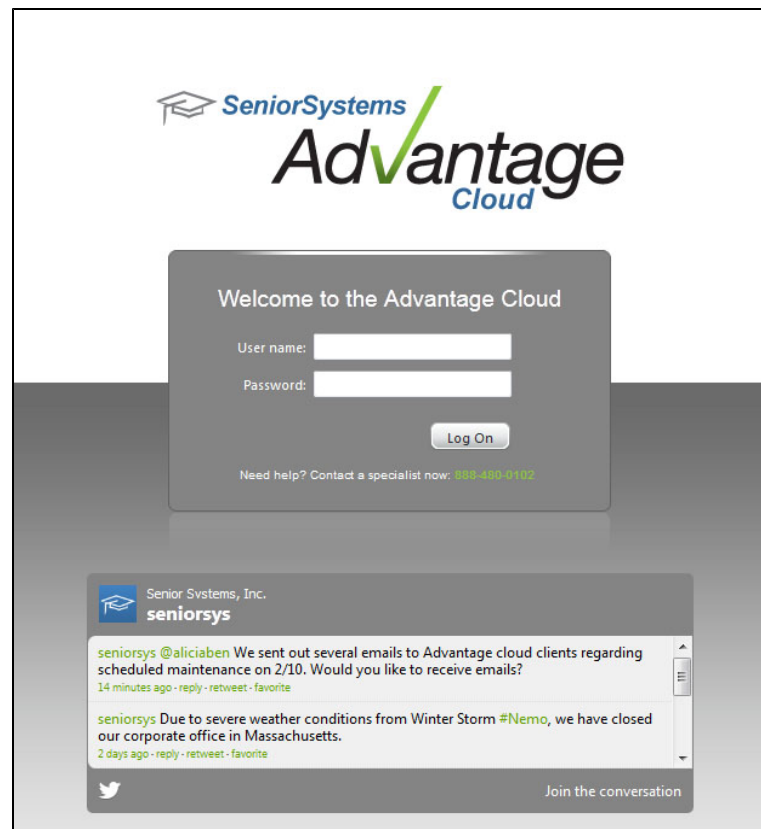
[Installing Citrix For Windows](#)

[Installing Citrix For Mac](#)

1. Navigate to <https://www.Senior-Anywhere.com>.

**Note:** If your security settings prevent the site from opening, or block the Citrix client detection software from running, you may need to add <https://www.senior-anywhere.com> to your browser's Trusted Sites or Security Exceptions list. See [Installing Citrix For Windows](#) for details.

2. Use your Citrix credentials to log in.




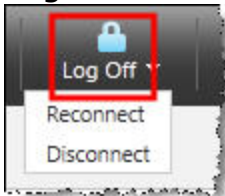


**IMPORTANT:** YOU MUST KEEP YOUR BROWSER OPEN to your hosted landing page as you work within your Advantage application(s) to maintain your database connection. You can, however, minimize the window while you work.

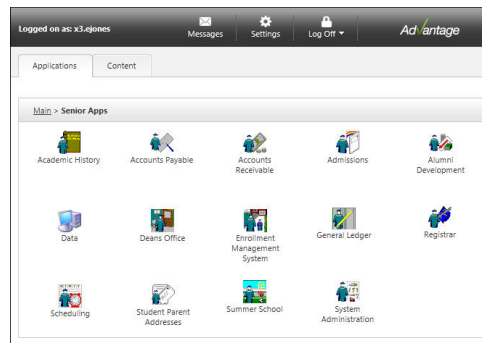
3. Your Advantage landing page appears.

**Across the top of your screen,** you will find quick links to basic functions related to your Citrix account and settings.

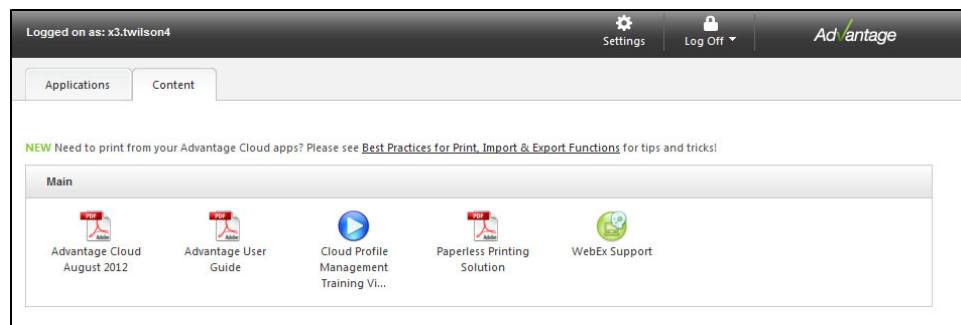


	<p>Click the <b>Messages</b> button to view important system notifications, including changes you may need to make to your settings.</p> <p><b>Note:</b> The Message icon only appears if you currently have messages from the system.</p>
	<p>Click the <b>Settings</b> button to view and/or change general settings, including your preferred client, your password, and screen settings.</p>
	<p>Click the <b>Log Off</b> button to end your session. You may see options to Reconnect or Disconnect. In most cases, you should simply click the Log Off icon to end your session.</p>  <p><b>Note:</b> After two hours of inactivity, you will automatically be logged out of the Citrix site.</p>

**On the Applications tab**, you will find all of your school's Advantage applications. Click to open an application in a new window, and enter your credentials.



**On the Content tab**, you can click to navigate to your My BackPack site, open a WebEx session with Senior Systems Product Support, open various user guides, and access training videos. Each of these options will open in a new tab or window, depending on your browser settings.



4. If you want to run more than one Advantage application simultaneously, wait until the Login screen for the first application opens before clicking to select any others.

**IMPORTANT:** The first application you select maps your local printers and drives. Failure to wait for this process to complete before opening additional Advantage applications may cause printing or saving issues.

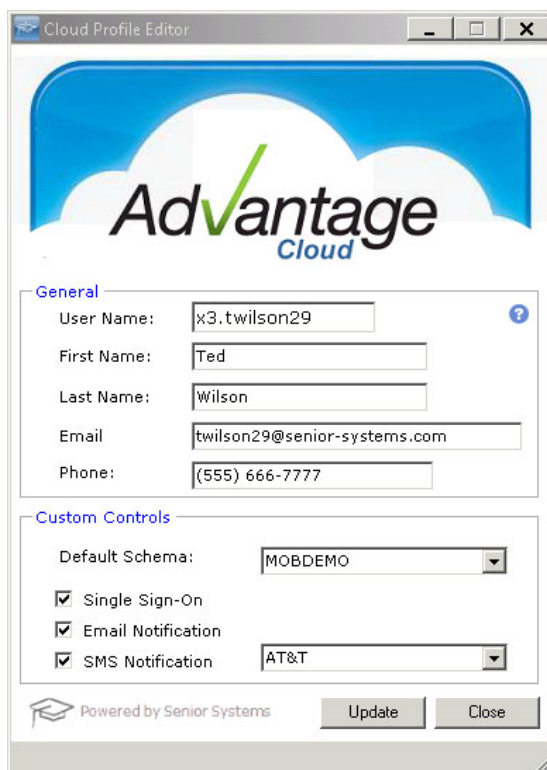
5. When you are finished, be sure to close your Advantage applications AND




click the **Log Off** button on your hosted landing page in the browser window.

## Cloud Profile Management Tool

The Cloud Profile Management tool controls certain preferences, including selecting a Default Schema, the Single Sign-On feature, Email Notifications and the SMS (Short Message Service) Notification, if your school chooses to use them.



- In the **General** section, you can enter your user name, first and last names, an email address and your phone number. Some of this information may already be present, depending on your school. You can also click the  **Help** button to access the online help.

**Best Practice:** Enter an email address here to receive important messages from the system, such as reminders to change your password or notifications that your profile has been updated.

- The **Custom Controls** area provides access to the **Default Schema** drop-down menu, the **Single Sign-On** checkbox, the **Email Notification** checkbox, and the **SMS Notification** checkbox.

<b>Default Schema</b>	If your school uses multiple schema, you can select your preferred schema via the <b>Default Schema</b> drop-down menu in the <b>Custom Controls</b> section.
<b>Single Sign-On</b>	<p>Check the <b>Single Sign-On</b> checkbox to sign into your Senior-Anywhere site using your credentials. Then launch any Advantage application to which you have access without being required to log into each application individually.</p> <p><b>Note:</b> If you select the <b>Single Sign-On</b> checkbox in conjunction with the <b>Default Schema</b>, you will automatically be signed into the Advantage Application that you open with the Default Schema that you have selected.</p>
<b>Email Notification</b>	Check the <b>Email Notifications</b> checkbox to receive email reminders and notifications to the email address specified above.
<b>SMS Notification</b>	To receive text messages concerning updates to your Cloud Profile, check the <b>SMS Notification</b> checkbox, select your cell phone provider from the drop-down menu, and enter your cell phone number in the <b>Phone</b> field in the General area.

- When you have finished entering all necessary information into the Cloud Profile Editor, click **UPDATE** to save any changes, or click **CLOSE** to exit without saving changes.

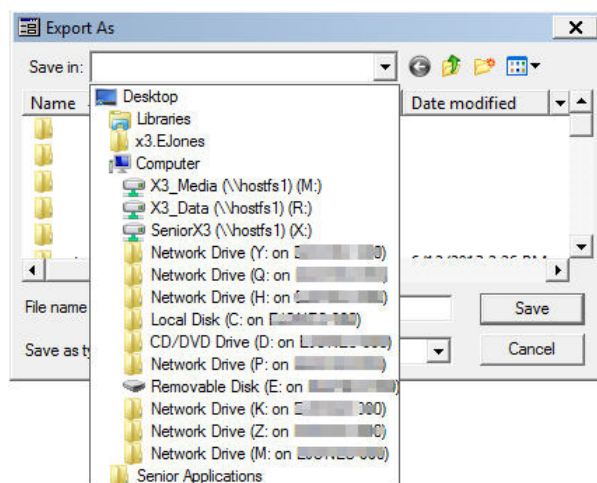
## How To Save Files

Drive mapping makes it possible to store and access documents locally (on your school's computers or network drives). It's important to understand where files are saved and how they can be retrieved when using Advantage applications in the Cloud environment, because your browser is working with applications that reside on a remote server.

**Note:** As of July 2013, there have been significant changes in this area, streamlining drive mappings and the file saving process.

The mapping may vary for your school, but generally, the following drives are mapped for your use

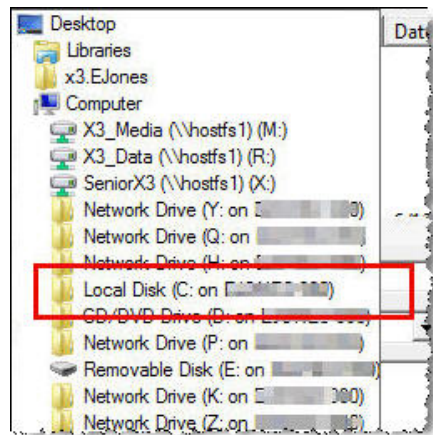
Drive Letter	Mapped To...
<b>R:</b>	A shared data drive set up for your school on the Senior Systems remote server (host); only used for files that are intended to be shared by ALL users
<b>M:</b>	A media drive on the remote server containing all the database media folders for your school (host)
<b>C:</b>	The Local C: drive (root folder) on your local computer; where you will normally save files
<b>Other</b>	Other options may be network drives, secondary hard drive (such as D:) and/or CD and DVD drives on your local computer (client)



**Note:** The first time you try to save or access a file on your local machine, you may receive a security warning asking for permission to access your local files. You should select 'Permit all access' and 'Do not ask me again for this site' to properly set these permissions so that you can save files to your local machine, and avoid having to constantly respond to this message.



**Your personal files** should be saved to the C: drive, which is your local machine.



**Files that you intend to share** should be saved on the R: drive, according to your school's preference. These drives can be used to make certain files accessible across your school's network.

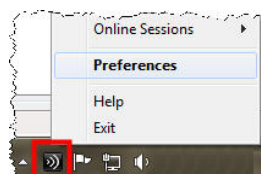
**IMPORTANT:** Archiving to the R: or M: drives is NOT possible, due to server constraints. You should save and archive **LOCALLY**, on the Local Disk C: drive. You can then upload files to a network drive for archival, depending on your school's procedure.

## How To Set Up Senior Access To Local Drive(s)

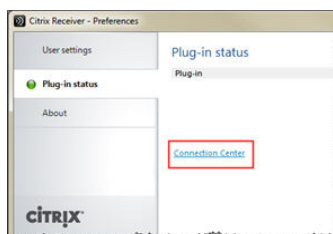
You must grant Advantage applications permission to access and save files on your local machine. In most cases, your browser will prompt you to allow application(s) to access your local machine. You can also use the Citrix Connection Center to give Advantage applications full access to files located on your mapped local drive(s).

**Note:** In order to perform this task, you must be signed into Citrix AND have an Advantage application open. If you are signed into Citrix but not into an Advantage application, the Citrix Connection Center will be blank.

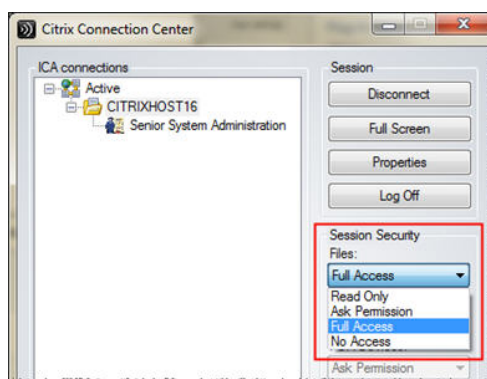
1. Right-click the Citrix Receiver icon in your task bar and select **Preferences**.



2. On the Plug-in status tab, click the **Connection Center** link.




3. Choose the appropriate Session Security options using the dropdown menus on the right. You should give your Advantage application(s) full access to files on your computer.

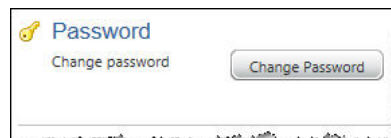


## How To Reset Your Password

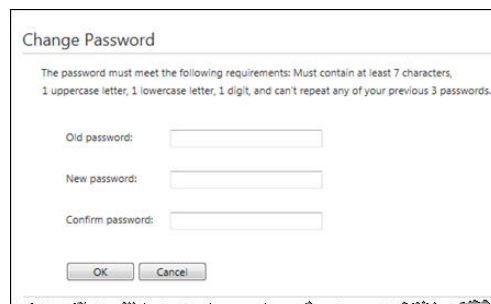
Citrix passwords must be changed every 90 days. This is a system security requirement. The system will prompt you to change your password 14 days before it expires. You can change your password at any time by logging into <https://www.Senior-Anywhere.com>.

1. Use your browser to navigate to <https://www.Senior-Anywhere.com>, and log in with your Citrix credentials.

2. Select  **Settings** from the menu at the top of your screen, then click the **CHANGE PASSWORD** button.



3. Enter your old and new passwords, confirm your new password, then click **OK**.

A screenshot of a 'Change Password' form. It contains instructions: 'The password must meet the following requirements: Must contain at least 7 characters, 1 uppercase letter, 1 lowercase letter, 1 digit, and can't repeat any of your previous 3 passwords.' Below this are three input fields labeled 'Old password:', 'New password:', and 'Confirm password:'. At the bottom are 'OK' and 'Cancel' buttons.

**Note:** When setting (or resetting) your password for Advantage applications, all passwords must:

- Be 7 or more characters long
- Include both upper and lower case characters
- Contain at least one number
- Not repeat any of the previous three passwords

You can also refer to on-screen text for details.

4. Click **SAVE** to return to the landing page.

## How To Print

1. Build or open your report. Click **PRINT**.
2. Select your local network printer from the list.

**Note:** You may need to navigate to the desired network printer the first time you print from an Advantage application.

3. Set up your printing options as desired and click **PRINT**.

**Best Practice:** The speed of your print job depends on the connection speed between your Advantage applications and your network printer(s), as well as the size of the resulting output. If you notice significant slowness, you may want to consider splitting print jobs into batches when possible.

## Paperless Printing Solution

Senior Systems provides a PDF printing tool, compatible with both PCs and Macs, that allows you to create PDF printouts quickly and easily. This tool is automatically available for all of your Advantage applications in the Cloud.

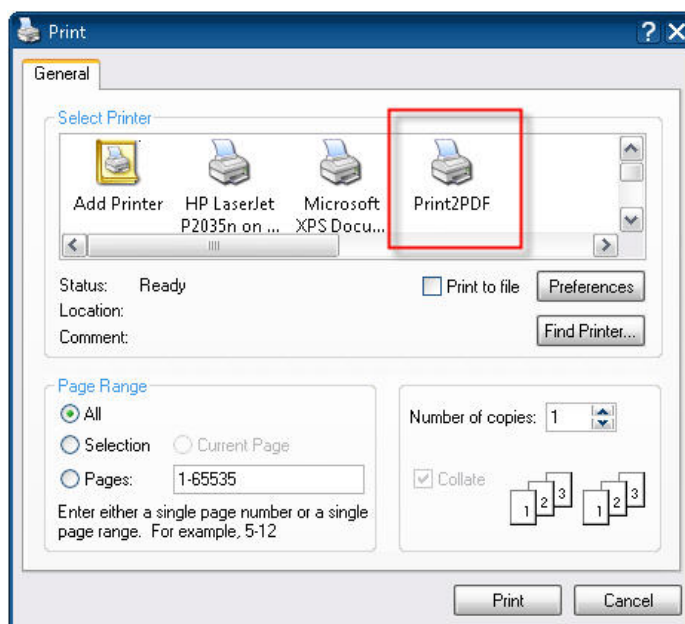
**Tip:** Go green! You can use the Print2PDF tool in all areas of the Advantage system, whether you use Mac or PC. You can save your files in digital format to maximize your ability to access and share your data, and minimize your use of paper.

## How To Use Print2PDF

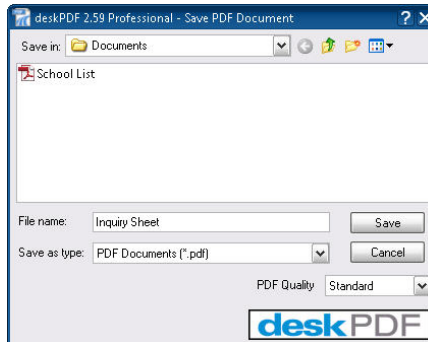
### CREATING PDF FILES:

No installation or setup is required by users to access the Print2PDF tool. When the print dialog opens, Print2PDF is available as a printer option, along with any other available printers.

1. Many types of print jobs are available in Advantage applications. From any screen, report, preview, etc., click **PRINT**.
2. In addition to your local and network printers, one of the printer options available to you will be named Print2PDF. Select **PRINT2PDF**. Specify any other print settings, if necessary.



3. The Save PDF Document screen appears. Some users will notice a deskPDF logo, which is the third party software behind the new Print2PDF tool.



**Note:** You may notice a checkbox on the Print2PDF screen to "Send via email". Even though this box is visible, the feature is not active.

4. By default, the system will save the new PDF file in the Data folder. Users can manually change the save location as needed.

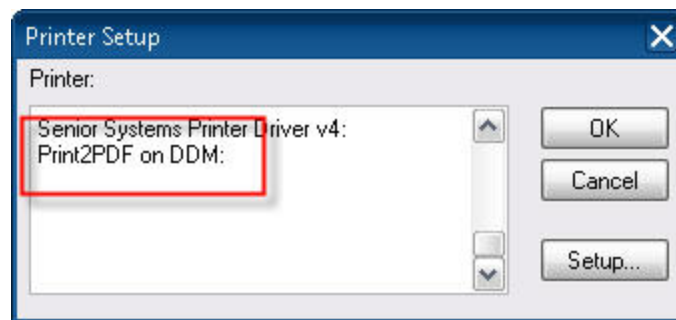
**Note:** You can contact Senior Systems to discuss changing the default save location, if desired.

5. Give the new file a name, then click **SAVE** to complete the process.

## SETTING UP PRINT2PDF AS YOUR DEFAULT PRINTER:

You can establish Print2PDF as your default printer in User Preferences.

1. In any Advantage application, navigate to **Maintenance > User Preferences**.
2. Then, navigate to **File > Printer Setup**. This opens the list of printers available to your machine (networked printers, local printers, etc.)
3. Select the option labeled **PRINT2PDF**.



4. Then click **OK** to save your printer preferences.

**Note:** Keep in mind that even if you set a default printer, because of the multiple types of print jobs the system is capable of performing, you may still be prompted to select a printer.

## How To Use Citrix At Home

To use your school's Advantage applications at home (or access the applications using a laptop that you take home), you must install the Citrix Receiver client on your computer. Remember that if you log into an Advantage application with the same username, but from two different computers, you use two Citrix licenses.

1. Install the Citrix Receiver client on the computer you intend to use. Select your operating system for installation details:

[Installing Citrix For Windows](#)

[Installing Citrix For Mac](#)

2. After installing the Citrix Receiver client, use your browser to navigate to <https://www.Senior-Anywhere.com>.
3. Log in with your Citrix credentials, then proceed as normal from your landing page.

If you have issues connecting to your Advantage applications from home, your ISP may have security settings in place that block your connection. Check with your local system administrator if you experience problems arising from local ISP policies and procedures.



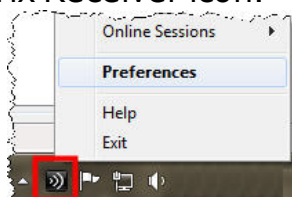
## Special Instructions: Windows 7

For Windows 7 users:

If you are using Windows 7 and the Citrix Receiver with your Advantage applications, you may experience a known issue, in which you are unable to start applications once logged into <https://www.Senior-Anywhere.com>. This issue impacts SOME (but not all) Windows 7 users.

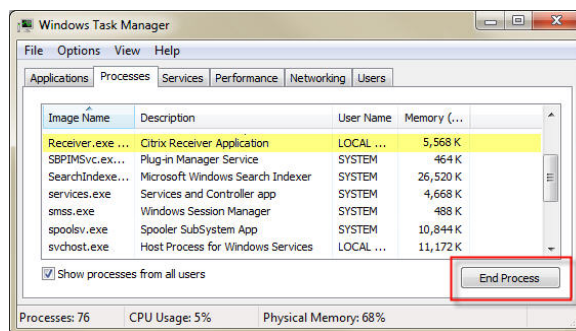
**Note:** Citrix Support is looking into this particular issue. This should be fixed in an upcoming release.

**If you think you are experiencing this issue**, right-click on the Citrix Receiver icon in your toolbar. If the context menu loads as usual, you are not experiencing this particular issue. You are experiencing this issue if you are unable to interact with the Citrix Receiver icon.



### Option 1: Restart Citrix Receiver

1. Open your task manager.
2. Locate the Citrix-related tasks in the list. Use the End Process button to end all Citrix tasks. You may see a system message asking you if you want to end the process. Confirm that you do by clicking 'End process' again.



Once you have ended all Citrix-related processes, the Receiver should start working again the next time you open an Advantage application.

## Option 2: Restart your computer

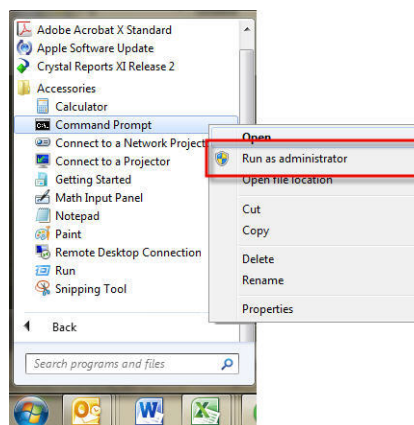
Once you have restarted your computer, the Receiver should start working again the next time you open an Advantage application.

## Option 3: Turn off DEP

**Caution:** Before attempting this option, make sure all Microsoft updates have been installed. If there are no outstanding updates, or if updates do not correct the problem, proceed with this fix.

To turn off DEP for Windows 7:

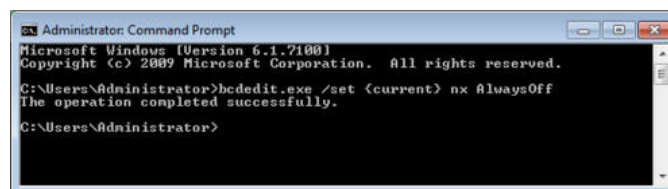
1. Click **Start > Accessories**.
2. Right-click **Command Prompt** and select 'Run As Administrator' from the context menu.



3. In the Command Prompt window, type the following:

```
bcdedit.exe /set {current} nx AlwaysOff
```

Then press 'Enter'.



4. You should see a message that "The operation completed successfully." You can then close the Command Prompt window.

**Note:** To enable DEP, follow the same procedure, but type the following in the Command Prompt window:

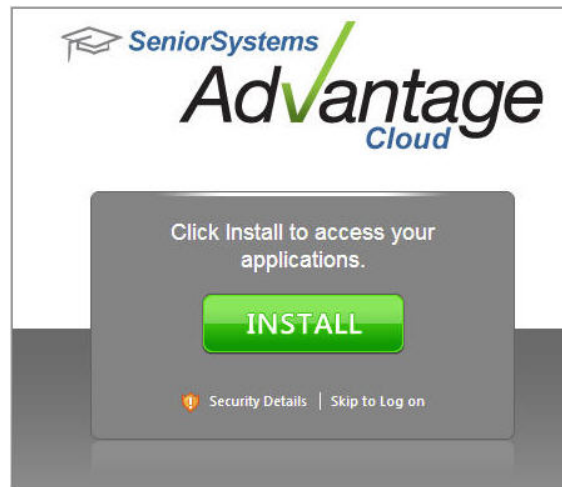
```
bcdedit.exe /set {current} nx AlwaysOn
```

Once you have disabled DEP, the Receiver should start working again the next time you open an Advantage application.

## Special Instructions: Google Chrome

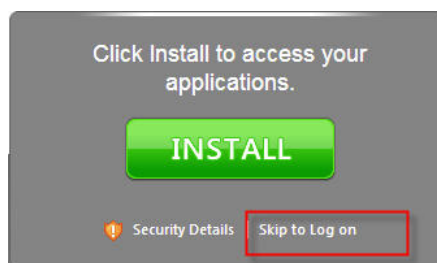
For Google Chrome users:

If you use Google Chrome to access the Cloud environment, you may see the green **INSTALL** button on your <https://www.Senior-Anywhere.com> login screen even though you already have the necessary Citrix client installed. This problem occurs because the Citrix detection plug-in does not always work correctly after you clear your browsing history.



Workaround:

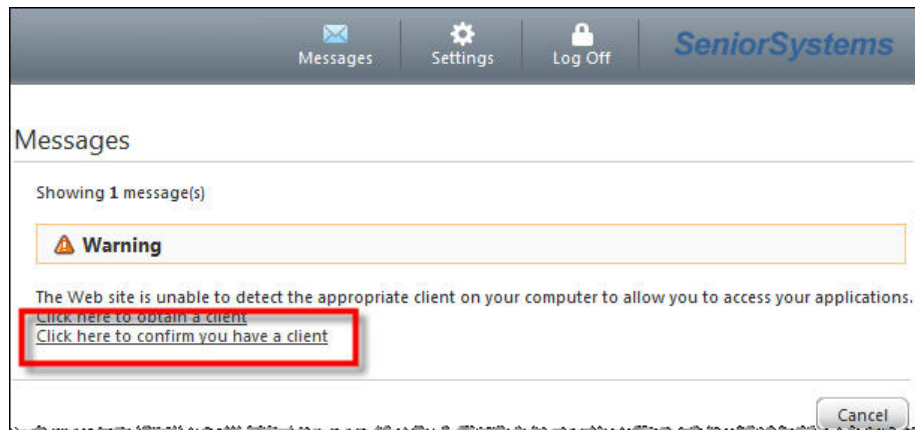
1. Click 'Skip to Log on', found just below the Install button.



2. Once you log in, click the  Messages button.

**Note:** The message button is found across the top of your screen, and only appears if you currently have messages from the system.

3. You will see a warning message, along with options to download a client or to confirm that you have already installed the required client. Click to confirm that you have already installed the required client.

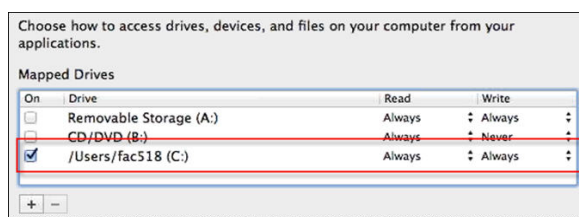


4. The system will then be able to detect that you have installed the client and you will be able to use your Advantage applications as usual.

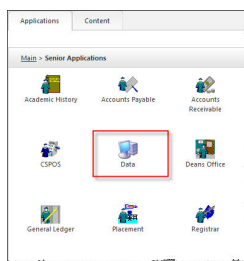
## Special Instructions: Mapped Drives (Mac)

If you are using a Mac, you may experience a known issue in which you cannot see one of your mapped drives. There is an easy way to correct this issue.

1. Log into a module.
2. Locate and select the Citrix Receiver tab in the top left corner of the screen.
3. A window with several tabs across the top appears. Click **DEVICES**.
4. You will see a list of mapped drives on the **Devices** tab. Make sure that the missing mapped drive's checkbox is "On", and that the **Read** and **Write** columns are set to "Always".



5. Close the Citrix Receiver window and log out of your Advantage Senior-Anywhere site completely.
6. Log back in. On your landing page, immediately open the Data app. You should be able to see the mapped drive, using the Data app's explorer tool.



You will then be able to access the mapped drive from any module.

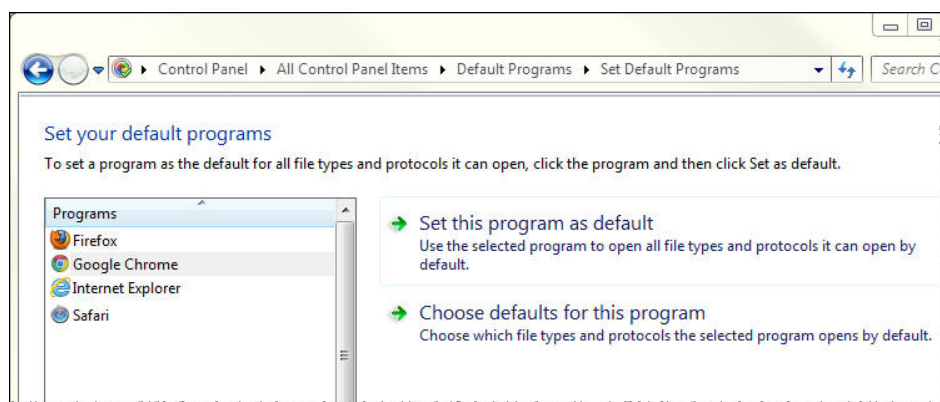
## Special Instructions: Email Links

Within your Advantage programs, you can view an address record and send an email to an individual by clicking an email address. This email hyperlink is designed to integrate seamlessly with your native email client.



In some cases, if you access <https://www.Senior-Anywhere.com> using a browser that is not set as your **preferred** browser, these email hyperlinks do not work properly. You may notice several issues, such as your email client does not open a new email, or that the system logs you out of your session.

In order to use email hyperlinks, you should use your preferred browser to access the Cloud. If you want to use a certain browser all of the time, you may need to change your local settings so that the browser you use is preferred. For Windows users, your default settings can be accessed through the Control Panel, depending on how your workstation is set up. Please contact your local system administrator for more information.



## How to Set Up iPad Access

For iPad users:

You can access your Advantage applications using an iPad. You should use the latest version of the Citrix Receiver app.

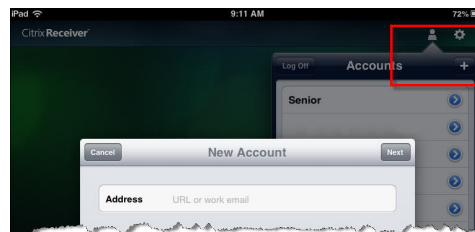
**Tip:** Once you set up your account, see iPad Tips for some suggestions about how to use the iPad with the Senior Systems Cloud.

To set up iPad Access:

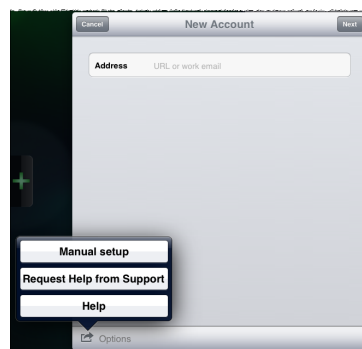
1. Download the Citrix app from the Apple store, then open the Citrix Receiver from your iPad.



2. Tap the **ACCOUNTS** icon, then choose **+** to add a new account.

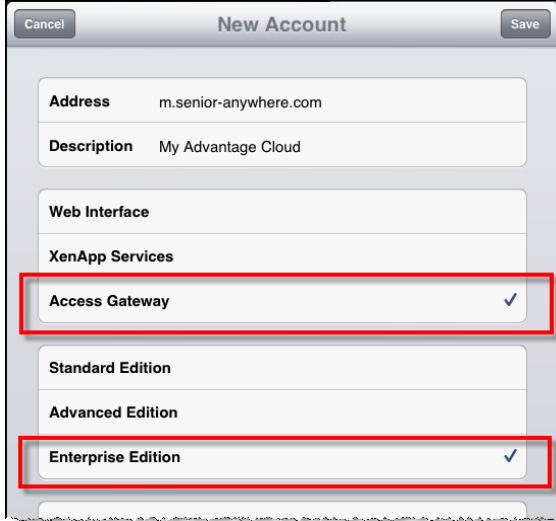
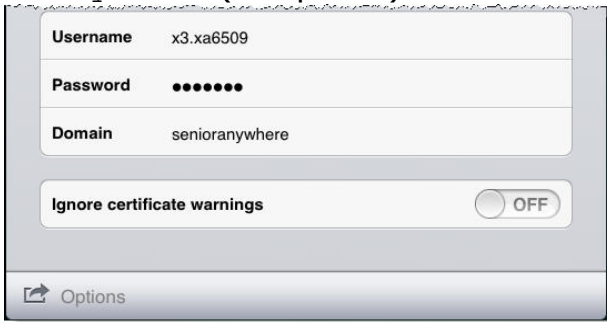


3. On the New Account screen, enter `m.senior-anywhere.com` in the Address field. Then tap **OPTIONS** at the bottom of the window.
4. Tap the **Manual setup** option.

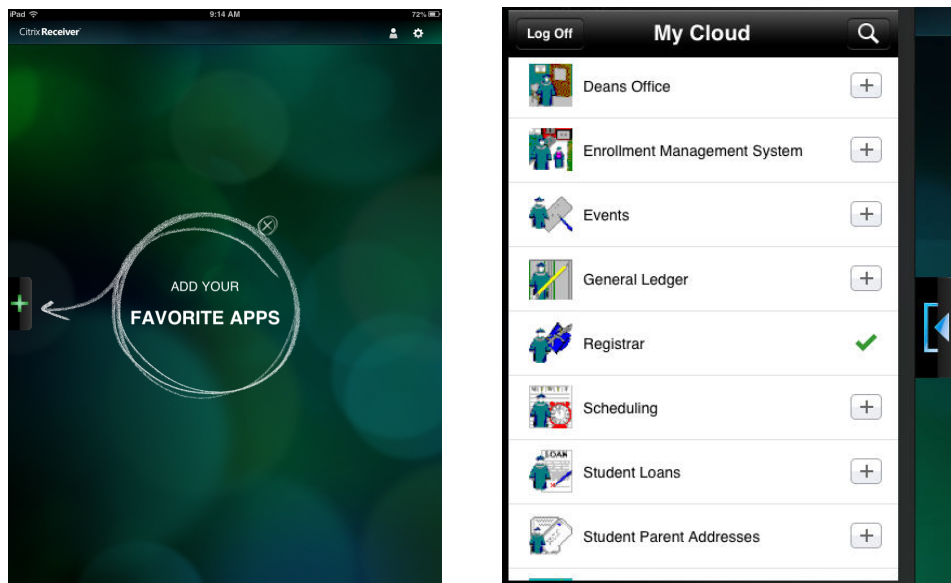




- On the setup screen, fill in the fields as described below, then tap **SAVE** (at the top-right).

<b>Address</b>	Enter <code>m.senior-anywhere.com/</code> . This field should already be populated when first setting up.
<b>Description</b>	Enter a short description (or name) for your account.
<b>Access Gateway</b>	<p>Tap the screen to select Access Gateway, Enterprise Edition.</p> 
<b>Username</b>	Enter your username (the same name you use to access your Citrix applications on your regular workstation).
<b>Password</b>	You do not need to enter your password here. You will enter your password when you log into the Cloud environment.
<b>Domain</b>	<p>Enter <code>senioranywhere</code> (no spaces)</p> 
<b>Certificate Warnings</b>	Set this option to 'Off'.

The Citrix Receiver will open, listing all of the Advantage applications available to you. Tap an application to launch.



When you open your Citrix Receiver app, you can select your account (if there are multiple accounts on the device) and log in with your Senior-Anywhere credentials.

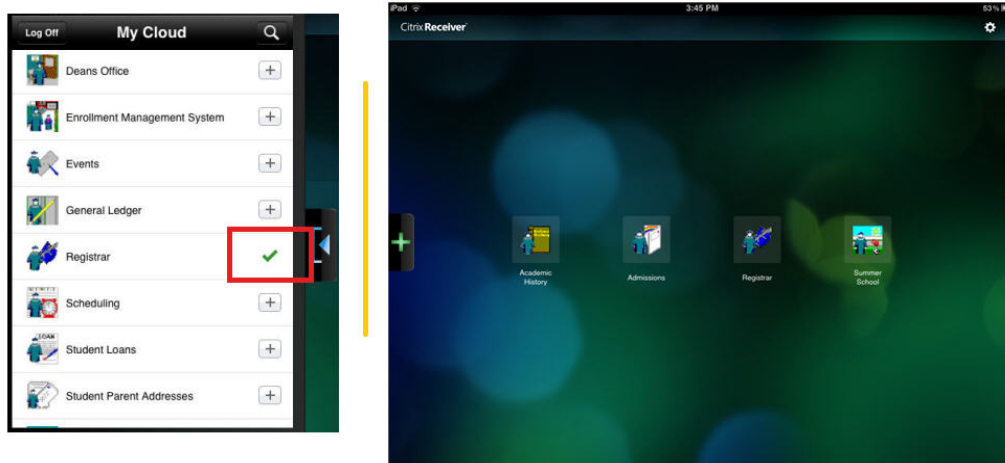


## Using iPad to Access the Cloud

For iPad users:

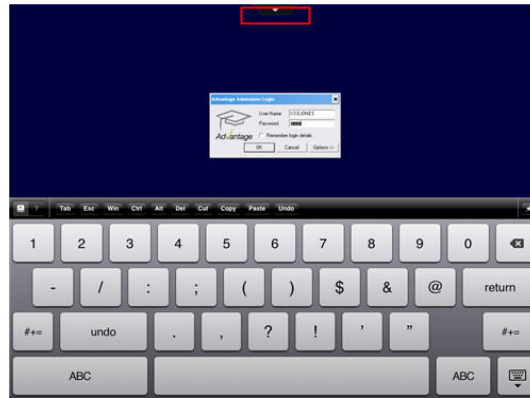
While it is not an optimal user experience, it is possible to access your Advantage applications using an iPad, via the Citrix Receiver. See [How to set up iPad access](#) for details about setting up your device. Below are some tips for working within the Cloud on your iPad.

- You can choose several 'favorite' applications to appear on the main screen for easy access whenever you open the Cloud. When you first log in, you will see a list of all the applications available to you. You can choose several 'preferred' applications from the list to appear on the main screen, so that you do not have to scroll through the full list. Simply tap the (+) button and a green check will appear, indicating that the application has been added to your main screen.

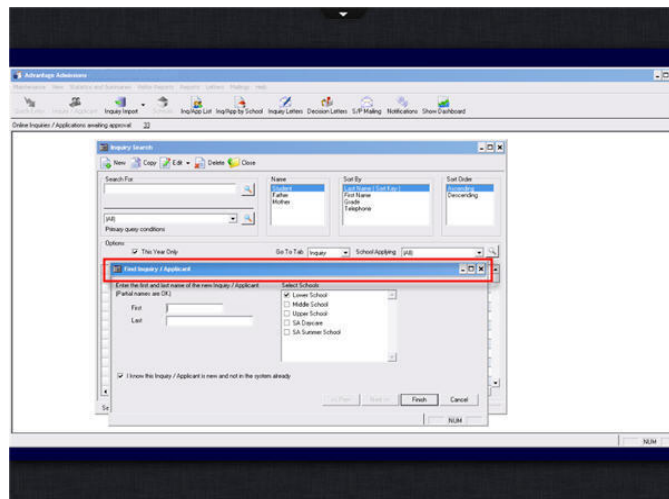


**Tip:** You can view the full list of your Advantage applications by tapping the green (+) plus to the left of your screen. When the applications list is open, you can hide it by tapping the blue (<) arrow to the right of the list.

- When you are working with your iPad in the Cloud environment, you may need to show or hide the keyboard. Simply tap the small arrow at the top of your screen. The dropdown that appears gives you options to show or hide the keyboard tool.



- When using your Advantage applications through the Citrix Receiver on your iPad, you can use your finger to move windows around the screen. Simply place your finger on the top bar of the window frame and drag it as needed.



**Caution:** Please keep in mind that accessing the Senior Systems Cloud environment via iPad is not officially supported, nor is it the optimal user experience. Check with your local system administrator if you have problems connecting to your Cloud from an iPad.

## How to Set Up Android Tablet Access

For Android Tablet users:

You can access your Advantage applications using an Android tablet. You should use the latest version of the Citrix Receiver app.

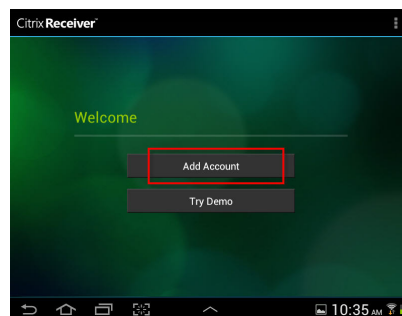
To set up iPad Access:

1. Download the Citrix app from Google Play, then open the Citrix Receiver from your tablet.

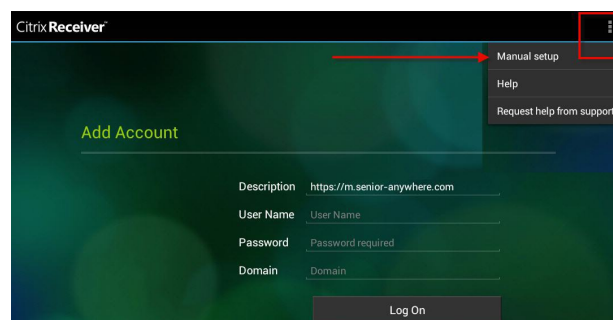
(The app can be downloaded here: <https://play.google.com/store/apps/details?id=com.citrix.Receiver>)



2. Tap **ADD ACCOUNT**.

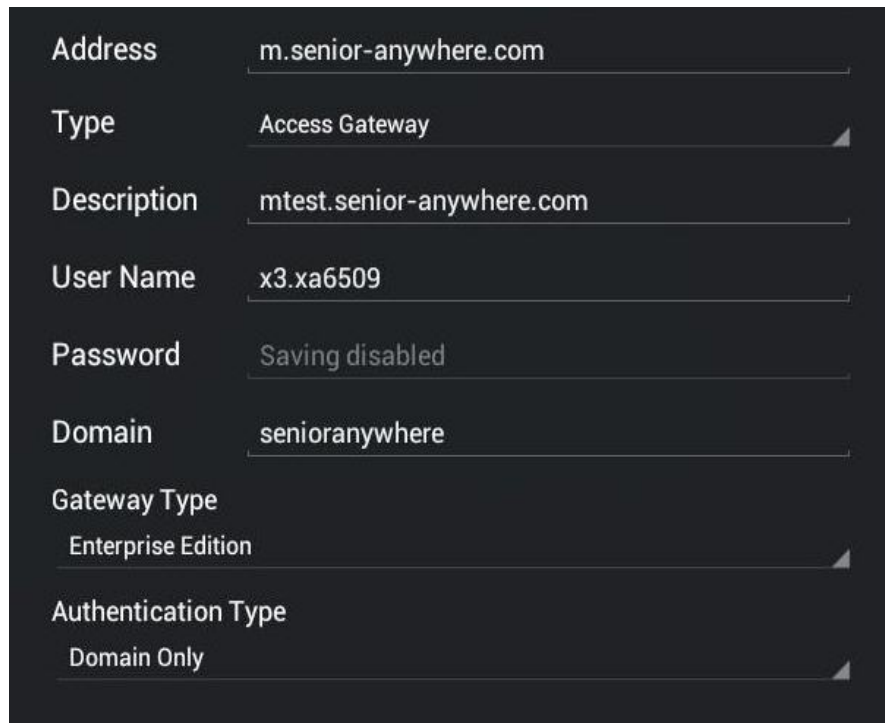


3. On the New Account screen, type a description for your account, then tap the menu icon at the top right of the screen. Tap the **Manual setup** option.



4. On the setup screen, fill in the fields as described below, then tap **SAVE**.

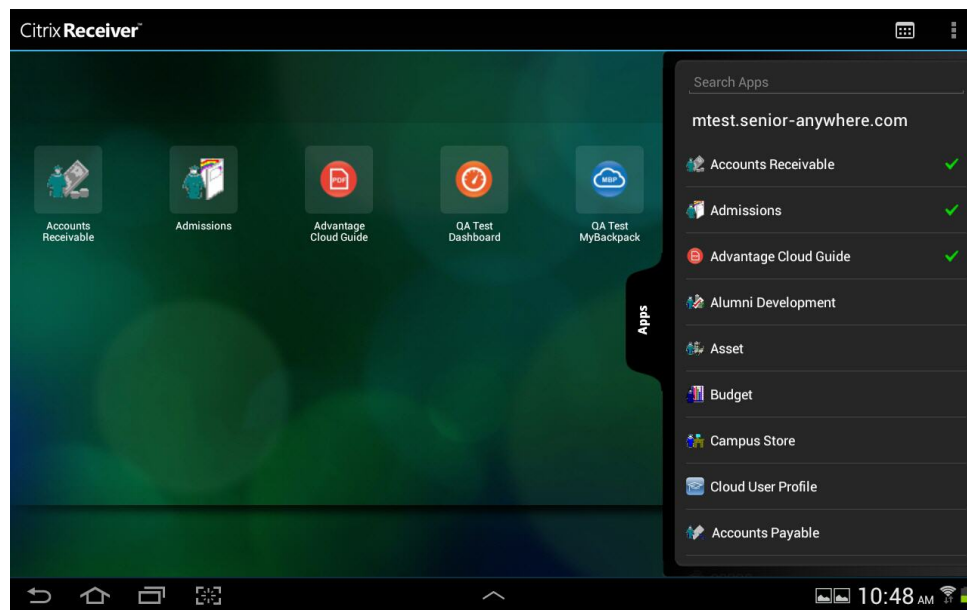
<b>Address</b>	Enter <code>m.senior-anywhere.com/</code> .
<b>Description</b>	Enter a short description (or name) for your account.
<b>Type</b>	Tap the screen to select Access Gateway.
<b>Username</b>	Enter your username (the same name you use to access your Citrix applications on your regular workstation).
<b>Password</b>	You do not need to enter your password here. You will enter your password when you log into the Cloud environment.
<b>Domain</b>	Enter <code>senioranywhere</code> (no spaces).
<b>Gateway Type</b>	This option is related to the Type selected above; should be set to "Enterprise Edition".
<b>Authentication Type</b>	This option should be set to "Domain Only"



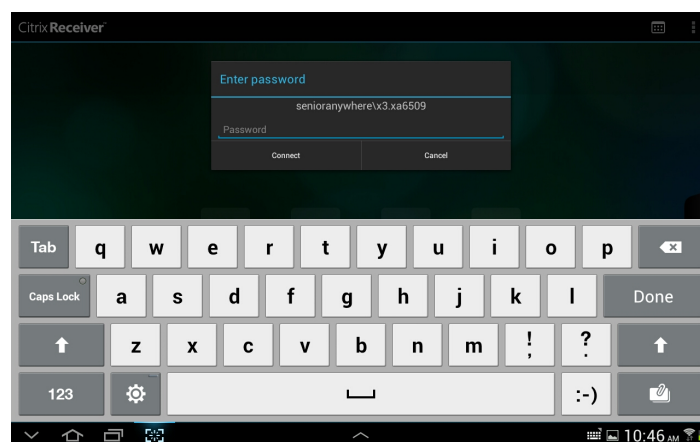
The screenshot shows a dark-themed setup screen with the following fields and values:

- Address:** `m.senior-anywhere.com`
- Type:** Access Gateway
- Description:** `mtest.senior-anywhere.com`
- User Name:** `x3.xa6509`
- Password:** Saving disabled
- Domain:** `senioranywhere`
- Gateway Type:** Enterprise Edition
- Authentication Type:** Domain Only

The Citrix Receiver will open, listing all of the Advantage applications available to you. Tap an application icon to launch.

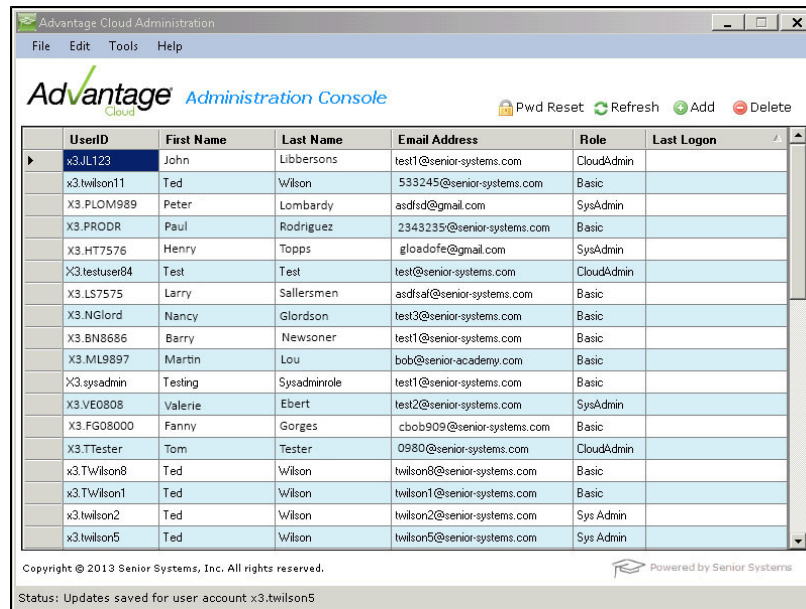


When you open your Citrix Receiver app, you can select your account (if there are multiple accounts on the device) and log in with your Senior-Anywhere credentials.



# Cloud Admin Tool





The Cloud Admin tool enables your school to manage user account settings, including creating new accounts, editing existing accounts, resetting passwords, and deleting accounts. You can also view all Roles assigned to users in the **Role** column, and sort each column by double-clicking the headers at the top of the grid. Only users with the Cloud Admin user role can access this tool.



The screenshot shows the 'Advantage Cloud Administration' window. It features a menu bar (File, Edit, Tools, Help) and a toolbar with icons for Pwd Reset, Refresh, Add, and Delete. Below the toolbar is a table with the following columns: UserID, First Name, Last Name, Email Address, Role, and Last Logon. The table contains 20 rows of user data. At the bottom, there is a copyright notice for 2013 Senior Systems, Inc. and a status bar indicating 'Updates saved for user account x3.twilson5'.

UserID	First Name	Last Name	Email Address	Role	Last Logon
x3.JL123	John	Libbersons	test1@senior-systems.com	CloudAdmin	
x3.twilson11	Ted	Wilson	533245@senior-systems.com	Basic	
X3.PLOM989	Peter	Lombardy	asdfs@gmail.com	SysAdmin	
X3.PRODR	Paul	Rodriguez	2343235@senior-systems.com	Basic	
X3.H7576	Henry	Topps	gloadofe@gmail.com	SysAdmin	
X3.testuser84	Test	Test	test@senior-systems.com	CloudAdmin	
X3.L57575	Larry	Sellersmen	asdfsaf@senior-systems.com	Basic	
X3.NGLord	Nancy	Glordonson	test3@senior-systems.com	Basic	
X3.BN8686	Barry	Newsoner	test1@senior-systems.com	Basic	
X3.ML9897	Martin	Lou	bob@senior-academy.com	Basic	
X3.sysadmin	Testing	Sysadminrole	test1@senior-systems.com	Basic	
X3.VE0808	Valerie	Ebert	test2@senior-systems.com	SysAdmin	
X3.FG08000	Fanny	Gorges	cbob909@senior-systems.com	Basic	
X3.TTester	Tom	Tester	0980@senior-systems.com	CloudAdmin	
x3.TWilson8	Ted	Wilson	twilson8@senior-systems.com	Basic	
x3.TWilson1	Ted	Wilson	twilson1@senior-systems.com	Basic	
x3.twilson2	Ted	Wilson	twilson2@senior-systems.com	Sys Admin	
x3.twilson5	Ted	Wilson	twilson5@senior-systems.com	Sys Admin	

**Note:** The Cloud Admin tool REPLACES the old password reset tool and Citrix license management tool. System administrators have the same capabilities with the new Cloud Admin tool, with an improved user experience.

 Add	Use this button to add a new user. See <a href="#">How To Create a New User Account</a> for detailed instructions.
 Delete	Use this button to delete an existing user account.
 Pwd Reset	Use this button to reset a user's password. See <a href="#">How To Reset User Passwords (Admin)</a> for details.
 Refresh	If you make changes to the grid, you may need to click <b>REFRESH</b> to see the new data.

You can double-click the grey column to the far left of the Cloud Administration table to display the **Edit Profile** screen.



UserID	First Name	Last Name	Email Address	Role	Last Logon
x3.twilson11	Ted	Wilson	test11@senior-systems.com	CloudAdmin	
x3.LCM989	Peter	Lombardy	asdfsdf@gmail.com	SysAdmin	
x3.PRM989	Paul	Rodriguez	2343235@senior-systems.com	Basic	
x3.HT7575	Henry	Topps	gloedofe@gmail.com	SysAdmin	
x3.testuse84	Test		test@senior-systems.com	CloudAdmin	
x3.LS7575	Larry	Sallersmen	asdfsdf@senior-systems.com	Basic	
x3.NGLord	Nancy	Glordon	test3@senior-systems.com	Basic	
x3.BN8686	Barry	Newsomer	test11@senior-systems.com	Basic	
x3.ML9897	Martin	Lou	bob@senior-academy.com	Basic	
x3.sysadmin	Testing	Sysadminrole	test11@senior-systems.com	Basic	
x3.VE0808	Valerie	Ebert	test2@senior-systems.com	SysAdmin	
x3.FG08000	Fanny	Gorges	cbo909@senior-systems.com	Basic	
x3.TTester	Tom	Tester	0980@senior-systems.com	CloudAdmin	
x3.TWilson8	Ted	Wilson	twilson8@senior-systems.com	Basic	
x3.TWilson1	Ted	Wilson	twilson1@senior-systems.com	Basic	
x3.twilson2	Ted	Wilson	twilson2@senior-systems.com	Sys Admin	
x3.twilson5	Ted	Wilson	twilson5@senior-systems.com	Sys Admin	

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Status: Updates saved for user account x3.twilson5

The **Edit Profile** screen enables you to view the user's **Username** and edit the user's **First Name**, **Last Name**, **Email Address** and **Phone** fields. You can also set the user's [Role](#) from the **User Role** drop-down. The **Account options** area gives you the ability to lock the user's account, **Enable Single-Sign On** (which the user can also control using the [Cloud Profile](#) tool) and **Force Password Change on Next Login** checkboxes.

**Edit User**

User account details:

User Name: x3.TWilson16

First Name (Required): Ted

Last Name (Required): Wilson

Email Address (Required): twilson16@senior-systems.com

Phone (Optional): (655) 666-7777

Account security:

User Role (Optional): CloudAdmin

Account options:

☒ Unlock Account (Optional) ☒ Enable Single Sign-on (Optional)

☒ Force password change on next login (Optional)

Ok Cancel


**Note:** The previous **Export** icon has been removed from the Cloud Admin tool, but you can still export Cloud Admin information by clicking **Tools > Export Users** and selecting your file-save location.

UserID	First Name	Last Name
x3.twilson5	Ted	Wilson
x3.twilson2	Ted	Wilson
x3.twilson11	Ted	Wilson

## How To Create a New User Account (Admin)

(For System Administrators)

Only users with the Cloud Admin [User Role](#) can access the Cloud Admin tool. The Cloud Admin tool enables users to edit existing user accounts, create new user accounts and set User Roles on user accounts. For security reasons, users with the Cloud Admin role will not appear in the grid or export file and are not available for editing.

1. Open the Cloud Admin tool and click  **ADD** (or click **Edit > Add user**). The **Create New User** screen appears.
2. In the **Create New User** screen, fill in the appropriate information for each field. Select the appropriate [User Role](#) for the user that you are creating.



The image shows a 'Create New User' dialog box with a title bar containing a green checkmark icon and the text 'Create New User'. The dialog is divided into two main sections: 'User account details:' and 'Account Security:'. The 'User account details:' section contains five text input fields: 'User Name (Required)' with the value 'X3.TWilson30', 'First Name (Required)' with 'Ted', 'Last Name (Required)' with 'Wilson', 'Phone (Optional)' with '(555) 666-7777', and 'Email Address (Required)' with 'twilson30@senior-systems.com'. The 'Account Security:' section contains a 'User Role (Optional)' dropdown menu currently set to 'Basic'. Below these sections are two lines of explanatory text: '\* Passwords are auto generated and emailed to the user' and '\*\* User account must be assigned to a Senior Systems database account using the alternate/ID field in the Systems Admin module.' At the bottom right are two buttons: 'Ok' with a green checkmark icon and 'Cancel' with a red X icon.

User account details:	
User Name (Required)	X3.TWilson30
First Name (Required)	Ted
Last Name (Required)	Wilson
Phone (Optional)	(555) 666-7777
Email Address (Required)	twilson30@senior-systems.com


  

Account Security:	
User Role (Optional)	Basic

\* Passwords are auto generated and emailed to the user  
\*\* User account must be assigned to a Senior Systems database account using the alternate/ID field in the Systems Admin module.

Ok Cancel

Field	Special Instructions
<b>User Name</b>	This field must contain at least 6 characters. The first three characters are your school code and a period (example: "SS."). Note that all user names MUST follow this convention. User names must be unique.
<b>First Name</b>	Field is required and only accepts alphabetical characters.
<b>Last Name</b>	Field is required and only accepts alphabetical characters.
<b>Phone</b>	Field is optional.
<b>Email</b>	Field is required and must be a valid email address.
<b>User Role</b>	Field is optional and defaults to the Basic role. See the <a href="#">Cloud User Role</a> topic for more information about User Roles.

- Click  **OK** once you have entered all of the necessary information for the new user that you are creating. The user receives a system-generated email notification containing a URL link and a temporary password.

Your Advantage Cloud password has been reset to Ahm#w51. Click [here](#) or copy the following URL into your browser to get started: <https://www.senior-anywhere.com>

-----

Questions? View the [Advantage Cloud webhelp](#), your detailed guide for working with your applications and the cloud environment.

The user must navigate to [www.Senior-Anywhere.com](https://www.Senior-Anywhere.com). They would then use the temporary password to log in. The system immediately prompts the new user to change the password to gain access to [www.Senior-Anywhere.com](https://www.Senior-Anywhere.com).

## Change Password

Advantage password guidelines:

- Be at least 7 characters long
- Include both upper and lower case characters
- Contain at least one number
- Not repeat any of your previous three passwords

Old password:

New Password:

Confirm password:

**Note:** To edit an existing user account in the Cloud Admin tool, simply double-click the grey box to the left of the **UserID** column. Alternatively, you can click **Edit > Edit User** in the Cloud Admin menu.

Advantage Cloud Administration

File Edit Tools Help

**Advantage** Administration Console

Pwd Reset Refresh Add Delete

	UserID	First Name	Last Name	Email Address	Role	Last Logon
▶	x3.JL123	John	Libbersons	test1@senior-systems.com	CloudAdmin	
	x3.twilson11	Ted	Wilson	533245@senior-systems.com	Basic	
	X3.LOM989	Peter	Lombardy	asdfs@gmail.com	SysAdmin	
	X3.PR123	Paul	Rodriguez	2343235@senior-systems.com	Basic	
	X3.HT7575	Henry	Toppis	gloadofe@gmail.com	SysAdmin	
	X3.testuser64	Test	Test	test@senior-systems.com	CloudAdmin	
	X3.LS7575	Larry	Sallersmen	asdfs@senior-systems.com	Basic	
	X3.NGLord	Nancy	Glordson	test3@senior-systems.com	Basic	
	X3.BN8686	Barry	Newsoner	test1@senior-systems.com	Basic	
	X3.ML9897	Martin	Lou	bob@senior-academy.com	Basic	
	X3.sysadmin	Testing	Sysadminrole	test1@senior-systems.com	Basic	
	X3.VE0808	Valerie	Ebert	test2@senior-systems.com	SysAdmin	
	X3.FG08000	Fanny	Gorges	cbob909@senior-systems.com	Basic	
	X3.TTester	Tom	Tester	0980@senior-systems.com	CloudAdmin	
	x3.TWilson8	Ted	Wilson	twilson8@senior-systems.com	Basic	
	x3.TWilson1	Ted	Wilson	twilson1@senior-systems.com	Basic	
	x3.twilson2	Ted	Wilson	twilson2@senior-systems.com	Sys Admin	
	x3.twilson5	Ted	Wilson	twilson5@senior-systems.com	Sys Admin	

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Status: Updates saved for user account x3.twilson5

The **Edit User** screen appears. The **Edit User** screen contains the same fields as the **Create New User** screen, with an additional option to **Unlock Account**, **Enable Single Sign-on**, and **Force password change on next login**.

**Edit User**

**User account details:**

User Name: X3.TWilson16

First Name (Required): Ted

Last Name (Required): Wilson

Email Address (Required): twilson16@senior-systems.com

Phone (Optional): (555) 666-7777

**Account security:**

User Role (Optional): CloudAdmin

**Account options:**

☒ Unlock Account (Optional) ☒ Enable Single Sign-on (Optional)

☒ Force password change on next login (Optional)

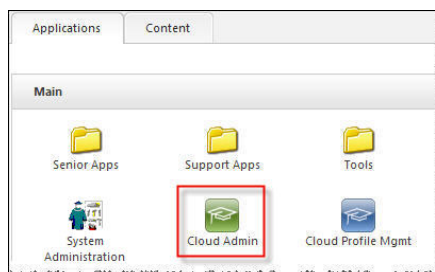
Ok Cancel




## How To Reset User Passwords (Admin)

(For System Administrators)

You can reset a user's password via the [Cloud Admin Tool](#). When you reset a user's password, the user receives a system-generated email notification that his or her password has been reset, and that the password should be updated when the user next logs in.

1. From your landing page, click to open the Cloud Admin tool.



2. Click to select the user whose password you want to reset, then click the  Pwd Reset **RESET** button.
3. The **Reset Password** confirmation window appears. Check to make sure that the information is correct, then click  **OK** to confirm. Click  **CANCEL** to exit without saving changes.



4. The user then receives an email that contains a temporary password and a link to [www.Senior-Anywhere.com](http://www.Senior-Anywhere.com), where the user is prompted to set up their new password.

Your Advantage Cloud password has been reset to Ahm#w51. Click [here](#) or copy the following URL into your browser to get started: <https://www.senior-anywhere.com>

-----  
Questions? View the [Advantage Cloud webhelp](#), your detailed guide for working with your applications and the cloud environment.

### Change Password

Advantage password guidelines:

- Be at least 7 characters long
- Include both upper and lower case characters
- Contain at least one number
- Not repeat any of your previous three passwords

Old password:

New Password:

Confirm password:

## How to Export User List (Admin)

(For System Administrators)

Using the [Cloud Admin Tool](#), your school's local system administrator can export a list of the school's Cloud users. The list includes the following data for each user:

- User ID
- First Name
- Last Name
- Email Address
- Role
- Last Logon Date
- Created On

1. Open the Cloud Admin tool and click **Tools > Export Users**.



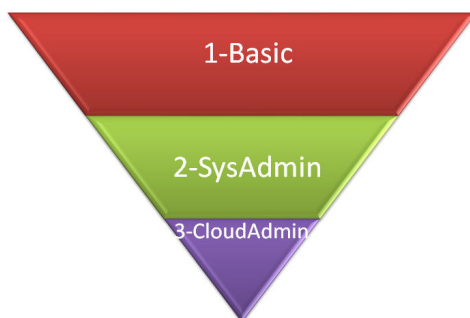
2. You will be prompted to save the file. Be sure to save to the correct location, and NOT on the server. See [How to Save Files](#) for details.
3. You can then view your file using MS Excel (or a similar spreadsheet program).

	A	B	C	D	E	F	G
1	UserID	First Name	Last Name	Email Address	Role	Last Logon	Created On
2	X3.EJones	Ethel	Jones	EJones@senior-academy.com	master	8/2/2012 15:50	6/29/2012 10:26
3	X3.Jsmith	Jane	Smith	JSmith@senior-academy.com	master	8/2/2012 12:58	6/29/2012 10:26

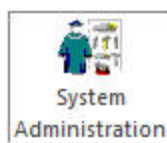


## Cloud User Roles

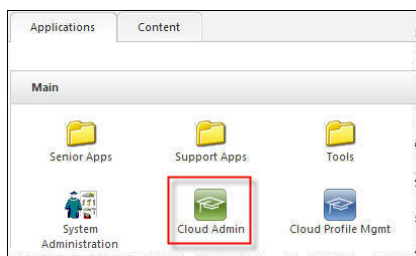
There are three basic user account 'roles' within the Cloud environment. These roles relate exclusively to the applications users can access within the Cloud, **and do NOT relate to Advantage application permissions.**



- **1-Basic User Role:** Users with the Basic role have access to all Advantage applications on their landing page except System Administration, and the [Cloud Profile Management Tool](#).
- **2-SysAdmin User Role:** In addition to all of the functions and tools available to users with the Basic role, the SysAdmin role gives access to Advantage System Administration.



- **3-CloudAdmin User Role:** In addition to the functions and tools available to users with the SysAdmin role, the CloudAdmin role gives users access to the [Cloud Admin Tool](#).



# Senior Systems Cloud Setup

(For System Administrators)

Moving into the Senior Systems hosted environment consists of five basic steps:

1. Ensure that the correct ports are open. See [Technical Requirements](#) for details.
2. Senior Systems will work with you to set up the proper authentication for your users to access the new hosting environment. See [Senior Systems Cloud Authentication](#) for details.

**Note:** If your school uses (or plans to use) Crystal Reports, you may need to set up additional user accounts for users who create and/or edit Crystal Reports. You do NOT need to set up additional accounts for users simply to run Crystal Reports. See [Setting Up Crystal Reports Users](#) for details.

3. Install the Citrix Receiver client on each work station from which you plan to run Advantage applications. The Receiver allows you to launch hosted applications through your system's web browser. Choose your operating system to begin your installation process.

[Installing Citrix for Windows](#)  
[Installing Citrix for Mac](#)

4. Make sure your users know how to use Advantage applications in the hosted environment.

<https://www.senior-systems.com/support/hosting/default.htm>

5. If you already use Advantage applications, use the Data tool to copy your existing Media files into your new hosted environment.

[How To Use Data Tool](#)

## Technical Requirements

(For System Administrators)

### Citrix Port and IP Listing

Client Firewalls must have Citrix port 443 opened for IP 74.201.32.126.

**Note:** All traffic must go through a single ISP.

### Supported Platforms and Browsers

#### PC Client: Citrix Receiver 3.3.0.17207

<http://www.citrix.com/downloads/citrix-receiver/legacy-client-software/receiver-for-windows-33.html>

**Note:** Newer releases for the Citrix Receiver have been known to cause problems with printing and exporting and should be avoided.

#### Supported Windows Operating Systems:

- Windows 8 (in Desktop mode)
- Windows 7, 32-bit and 64-bit editions (including Embedded Edition)
- Windows XP Professional, 32-bit and 64-bit editions
- Windows XP Embedded
- Windows Vista, 32-bit and 64-bit editions
- Windows Thin PC

#### Supported Browsers:

- Internet Explorer Version 6.0 through 10.0
- Mozilla Firefox Version 3.x through 5.x
- Chrome Version 10.x

## Mac Client: Citrix Receiver 11.5

<http://www.citrix.com/downloads/citrix-receiver/legacy-client-software/receiver-for-for-mac-115.html>

**Note:** Newer releases for the Citrix Receiver have been known to cause problems with printing and exporting and should be avoided.

### Supported Devices:

- Mac OS X 10.6x 32-bit or 64-bit
- Mac OS X 10.7x 32-bit or 64-bit

### Supported Browsers:

- Safari Version 5.x or later
- Mozilla Firefox Versions 3.x through 5.x
- Chrome Version 10.x

## Senior Systems Cloud Authentication

Senior Systems Cloud Authentication allows your school's users to log into Senior-Anywhere, Advantage applications, My BackPack, Web Services, and any other integrated portals with the same set of secure credentials. Cloud Authentication also allows your Cloud users to take advantage of the system's Single Sign-On capabilities.

**Tip:** Once Cloud Authentication is enabled, users should sign into Senior-Anywhere, Advantage applications, and My BackPack using their Senior-Anywhere user name and password.

## Senior-Anywhere Authentication

Cloud Authentication uses the LDAP settings in the Advantage System Administration application. As you consider how you want to set up your Cloud, Senior Systems will work with you to determine the best solution for your needs. Once you determine how best to set up your user accounts, you can use Advantage System Administration to enable LDAP authentication for your users.

**Note:** Your school will not be able to use Cloud Authentication to integrate with Google apps. Google apps are not supported by Senior Systems.

## Setup

Setting up Cloud Authentication consists of two basic tasks:

1. [Enabling Cloud Authentication](#)
2. [Setting Up User Accounts](#)

**Note:** In order to use the Senior Systems Cloud, you must use LDAP Authentication.

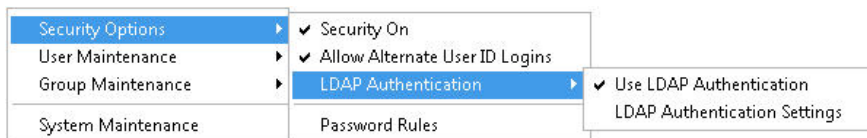
## How To Enable Cloud Authentication

The following steps describe how to enable Cloud Authentication for your school. Keep in mind that once authentication is enabled, you need to set up individual user accounts separately. See [How To Set Up User Accounts With Cloud Authentication](#) for details.

1. Log into Advantage System Administration. Navigate to **File > Security Options > LDAP Authentication**.
2. Your LDAP Authentication settings are unique. Senior Systems will set this up for you.

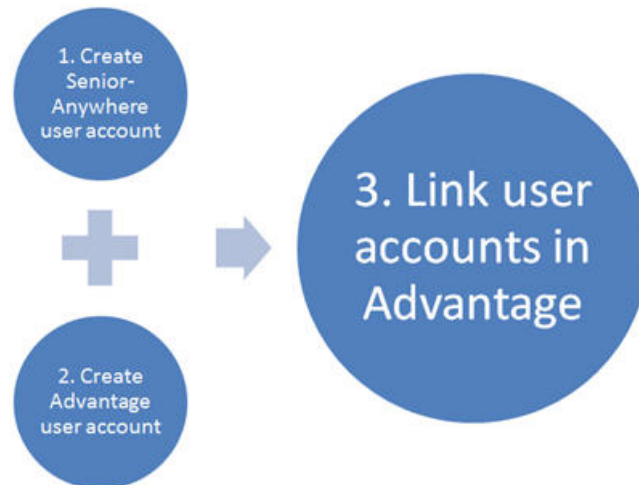
**Caution:** These settings should not be modified without first consulting with Senior Systems.

3. Make sure that the option to 'Use LDAP Authentication' is checked.



## How To Set Up User Accounts With Cloud Authentication

An individual will need both a Senior-Anywhere (Citrix) user account and an Advantage user account to enable LDAP Authentication. The setup process essentially associates the two accounts, so that the individual can access both Senior-Anywhere (Citrix) and Advantage with a single set of credentials.



For more information about creating accounts, see [How To Create a New User Account \(Admin\)](#) and the Advantage System Administration user guide.

### Linking Accounts:

1. Log into Advantage System Administration. Navigate to **File > User Maintenance**. You can choose to create a new user, or edit an existing user if you want to enable Cloud Authentication for someone who already has a user account in Advantage.

2. On the Create or Edit User screen, enter a User Name (only seen within Advantage applications) and a Domain/Alt. ID. The Domain/Alt. ID field should be set to the individual's Citrix ID.

Advantage User Name → User Name JSMITH

Senior-Anywhere User Name → Domain/Alt. ID x3.jsmith

**Create New User**

**User Information**

User Name JSMITH

Domain/Alt. ID x3.jsmith

**Authentication**

☒ Allow LDAP login for this user

☐ Allow Single sign-on for this user

Password (30 chars. max.)

Retype Password

Full Name John Smith

Job Title Dean of Students

3. Check the box in the Authentication section of the screen to 'Allow LDAP login for this user'.
4. The system will then associate the Citrix user with the Advantage user name. The system automatically fills in the Password fields, which are not editable on this screen.
5. Now the individual's Advantage account and Citrix account are linked. The user should now use his or her Citrix credentials to log into <https://www.Senior-Anywhere.com>, Advantage applications, and My BackPack.
6. Save your changes.

**Tip:** Once Cloud Authentication is enabled, users should sign into Senior-Anywhere, Advantage applications, and My BackPack using their Senior-Anywhere user name and password.



## Installing Citrix For Windows

### Preparing Your System

1. Ensure that no local drives are assigned the letters R:, M:, or X:. These drive names will be used to save files within your hosting environment. See [How To Save Files](#) for details.
2. Log into your system using an administrator account.
3. Add `https://www.senior-anywhere.com` to your Trusted Sites list in Internet Explorer:
  - a. From the Tools menu, select **INTERNET OPTIONS**.
  - b. Select the Security tab.
  - c. Select the Trusted Sites zone, then click **SITES** to view/add/edit sites on your trusted sites list.

**IMPORTANT:** This step is necessary even if you plan to use a different browser, such as Firefox or Netscape.

4. Make sure that an older version of the Citrix web client is NOT already installed. If you have an outdated Citrix client already installed, you must uninstall it before installing the Citrix Receiver.

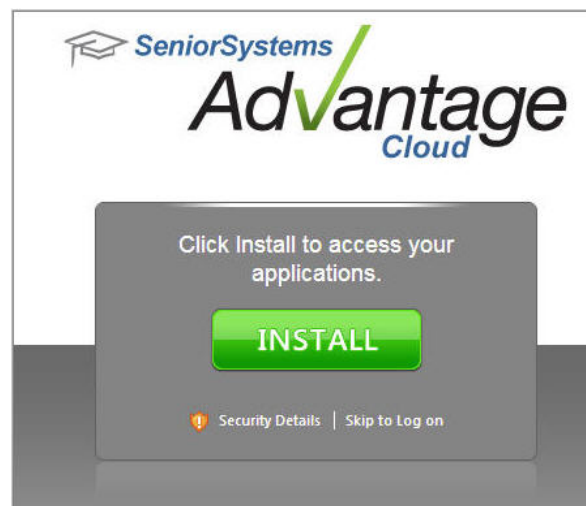
To uninstall:

- a. From your Control Panel, open the Add/Remove Programs or Uninstall or Change a Program tool.
- b. Look for the outdated Citrix client program in the list.
- c. If an outdated client is not in your list, you can close the window and proceed to installation. Otherwise, click to select it for removal.
- d. If prompted, click **REMOVE** and proceed with the uninstall process.
- e. Restart your computer.
- f. Before proceeding with installation, check your program list to confirm that the program is no longer installed.

## Installation

You can download and install the latest version of the Citrix Receiver client directly from <https://www.Senior-Anywhere.com>. When you navigate to the site, you will be prompted to install the Citrix client if it is not already present on your computer.

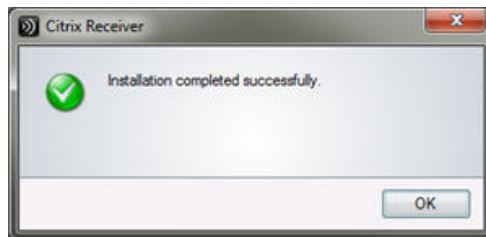
1. Make sure you are still logged into your system using an administrator account and that you have disabled any pop-up blockers and anti-virus software.
2. Navigate to <https://www.Senior-Anywhere.com>. If the Citrix Receiver client is not already installed on your computer, you will see a green **INSTALL** button. Click the checkbox beside 'I agree with the Citrix license agreement', then click **INSTALL**.



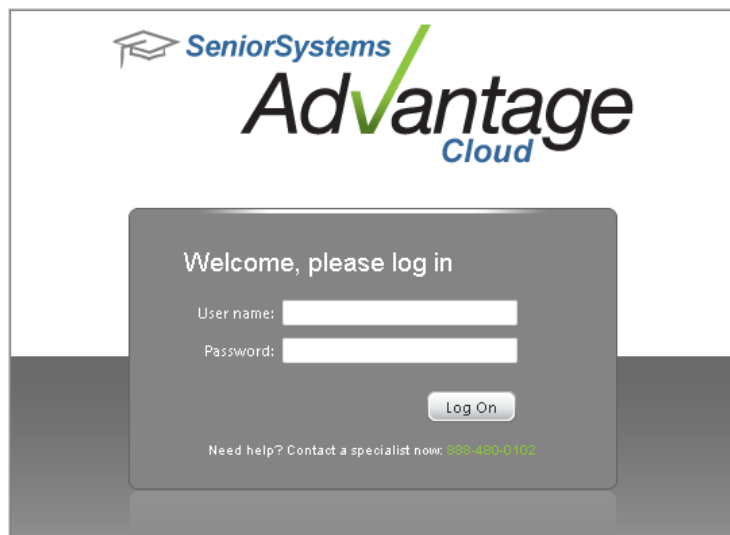
3. Your browser will prompt you to 'Run' or 'Save' the installation file. In most cases, click **RUN**.

**Note:** If your security settings prevent the site from opening or block the Citrix client detection software from running, you may need to add <https://www.senior-anywhere.com> to your browser's Trusted Sites or Security Exceptions list.

4. You will see a pop-up when installation is complete:



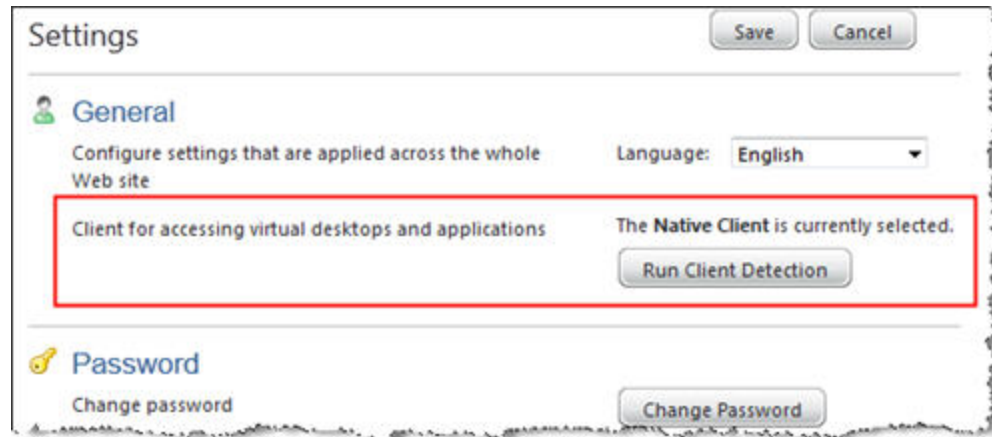
5. You will then be able to log into <https://www.Senior-Anywhere.com> with your Citrix credentials, and access your school's Advantage applications.



6. Verify that the default web browser is set to Native Client:



- From the landing page, click **Settings**.
- Verify that 'Client for accessing virtual desktops and applications' is set to **Native Client**.
- If not, click **RUN CLIENT DETECTION** and follow the system prompts to select/install the native client.
- Click **SAVE** if you make any changes. Otherwise click **CANCEL** to return to the landing page.



**IMPORTANT:** DO NOT FORGET to re-set any anti-virus or other security software that you may have disabled, after installation is complete.

## Installing Citrix For Mac

### Preparing Your System

1. Ensure that no local drives are assigned the letters R:, M:, or X:. These drive names will be used to save files within your hosting environment. See [How To Save Files](#) for details.
2. Log into your system using an administrator account.
3. Make sure that the Citrix web client is NOT installed. If you have outdated Citrix clients already installed, you should uninstall them and restart your computer before installing the Citrix Receiver.

### Downloading and Installing the Citrix Receiver

1. Make sure you are logged into your system using an administrator account and that you have disabled any pop-up blockers and anti-virus software.
2. Go to [www.Citrix.com/Downloads](http://www.Citrix.com/Downloads) and download the latest version of the Citrix Receiver for Mac.
3. Your download will begin. Once complete, open the Citrix Receiver .DMG file from your Downloads folder (a .DMG file is the Mac equivalent of an executable file).

**Note:** You may need to specify how your system opens the installer, or your security settings may block access to the file.

- To specify how your system opens the installer, double-click the .DMG file and select the 'Install' icon.




- To run the .DMG file (if it is being blocked), right-click the .DMG icon in the installer for options to bypass security settings.

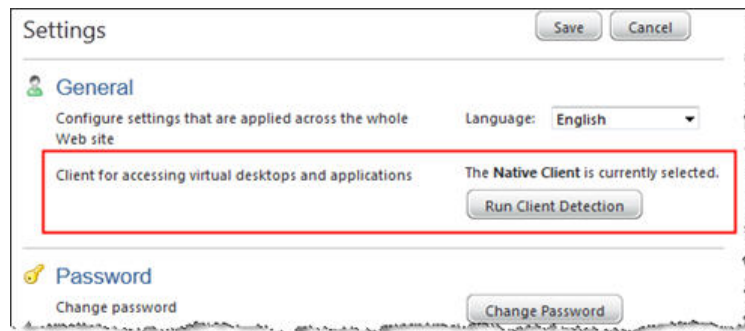


4. The Receiver Installer wizard will open and walk you through the installation process. You will be prompted to accept licenses, enter your credentials, and allow installation.



5. Once installation is complete, use your browser to navigate to <https://www.Senior-Anywhere.com>. Log in with your Citrix credentials.
6. Verify that the default web browser is set to Native Client.

- a. From the landing page, click  **Settings**.
- b. Verify that 'Client for accessing virtual desktops and applications' is set to **Native Client**.
- c. If not, click **RUN CLIENT DETECTION** and follow the system prompts to select/install the native client.
- d. Click **SAVE** if you make any changes. Otherwise click **CANCEL** to return to the landing page.



## Citrix License Usage

A license is in use from the moment when a user logs into any Advantage application to the moment when the user logs out of all Advantage applications he or she opened (NOT when a user merely logs into their Senior-Anywhere site and views available applications).

- When a user launches an application, a license is checked out to that user.
- Using the same credentials to log into multiple applications on a single computer uses only one license.
- Using the same credentials at different computers uses multiple licenses.

When the user closes the application(s), ending the database connection, the license is released and available for others. Senior Systems only offers concurrent user licenses for Citrix.

<b>Note:</b> After two hours of inactivity, you will automatically be logged out of the Citrix site.
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# Moving To The Cloud Environment

If you already use Senior Systems applications but are new to the Cloud environment, there are several major changes for all users to be aware of:

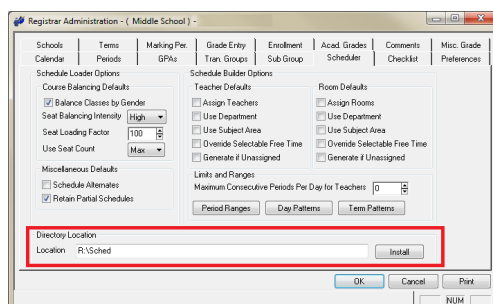
**Direct links to your Senior Systems site(s)** will change.

- If your school uses **My BackPack**, the link to your landing page will change.
- If your school uses **My BackPack for Online Admissions**, the link to your Admissions landing page will change.
- If your school uses **My BackPack for Online Summer School Registration**, the link to your Summer School landing page will change.
- Any **Dashboard** links, including embedded links, will change.
- Any **Web Services** links, including embedded links, will change.

**Users should be aware of new file-saving procedures.** Users logged into a server in the Cloud environment must understand that the 'My Documents' and 'Desktop' folders listed are NOT their local 'My Documents' and 'Desktop' folders. See [How To Save Files](#) for details.

**Applications will launch MS Word in the Cloud, in conjunction with Mail Merge** once you move to Senior Systems hosting. Advantage applications will launch MS Word from the Cloud, not from the user's local machine, to create and save merge files. Users should be careful to save files in the correct location.

**If your school uses the scheduling module**, on the Scheduler tab in Administration Maintenance, change Directory Location to R: \Sched and click **INSTALL**.



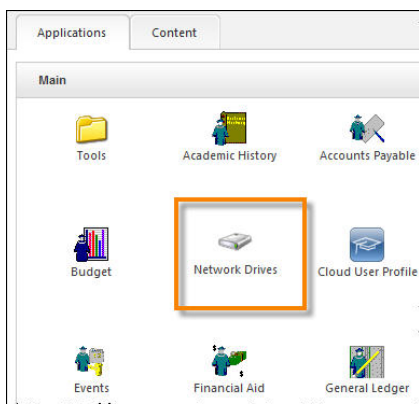
## How To Use Network Drives

(For System Administrators)

Most data problems are the result of saving to the remote server instead of your local computer. You can use the Data application to navigate through your folders and move the misplaced file(s) to the correct location if necessary. It can also be used to copy media files into your new environment as part of your move to the Senior Systems Cloud.

**Note:** Files accidentally saved to the My Documents folder on the server will likely not be retrievable.

1. Click to open the Network Drives App.



**Note:** The first time you try to save or access a file on your local machine, you may receive a security warning asking for permission to access your local files. You should select 'Permit all access' and 'Do not ask me again for this site' to properly set these permissions so that you can save files to your local machine, and avoid having to constantly respond to this message.

2. The Network Drives app opens, giving you an explorer-type tool.
3. Use the tool to find and move files between different locations on both the server and your local machine. In general, the following drives are mapped for your use:

<b>Drive Letter</b>	<b>Mapped To...</b>
<b>R:</b>	A shared data drive set up for your school on the Senior Systems remote server (host); only used for files that are intended to be shared by ALL users
<b>M:</b>	A media drive on the remote server containing all the database media folders for your school (host)
<b>C:</b>	The Local C: drive (root folder) on your local computer; where you will normally save files
<b>Other</b>	Other options may be network drives, secondary hard drive (such as D:) and/or CD and DVD drives on your local computer (client)

See [How To Save Files](#) for details regarding drive mapping and general usage guidelines.

# Setting Up Crystal Reports Users

(For System Administrators)

For schools using Crystal Reports:

When you create accounts for users who will need access to Crystal Reports, you must follow specific guidelines for creating user accounts and establishing those users' database connections. **Note that these accounts need only be created for those users who need access to CREATE and/or MODIFY Crystal Reports.** Users can run, print, and save Crystal Reports with normal user accounts, depending on security keys. See [Crystal Reports User Setup](#) for details.

## Crystal Reports User Setup

Setting up a Crystal Reports user is a two-step process:

1. Create the account
2. Establish a Crystal Reports database connection

This two-part process must be completed for each user individually before he/she can create or modify Crystal Reports. Once the user account has been created and the database connection is established, the user will be able to log in and select the correct database connection under **My Connections**.

## Account Creation

Hosted schools should follow the standard naming convention to create user names for accounts with access to create and edit Crystal Reports. Names should begin with "CRSTL", followed by your school ID and a numeral:

CRSTL + <School ID> + <0-9>

Your school ID is used as the last two letters of your SENIORXX (system administrator) account. For example, if your system administrator account is SENIORSS, your school ID is SS. Your Crystal Reports user names would be:

CRSTL + SS + <0-9>

For example:

CRSTLSS1  
CRSTLSS2  
CRSTLSS3

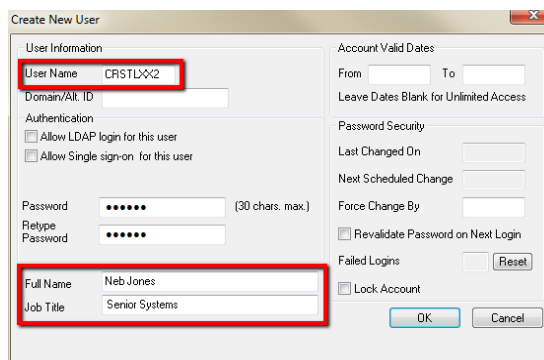
**Note:** Users cannot edit or create Crystal Reports with standard Advantage or Citrix accounts, or the SENIORXX account assigned to your school. **You must set up specific accounts for users to perform these tasks.**

## Procedure

1. In System Administration, navigate to **File > User Maintenance > Creating New User Accounts**.
2. Create a new user name according to the user name standards:

CRSTL + <School ID> + <0-9>

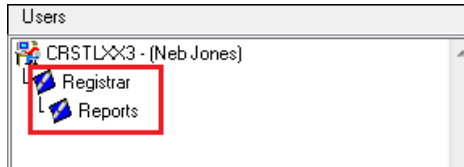
- You can use the Full Name and Job Title fields to indicate the individual assigned to the Crystal Reports user.
- Passwords can be up to 50 characters in length and MUST begin with a letter.



3. Once you have finished adding users, navigate to **File > User Maintenance > Edit User Profiles**.

4. Add the necessary permissions to your Crystal Reports user(s).

In most cases, giving the user the Reports security key for the application (s) the user needs to access will be sufficient. Users will only need this account to create or make changes to Crystal Reports. Users can run reports with their normal credentials.



5. Save your changes.

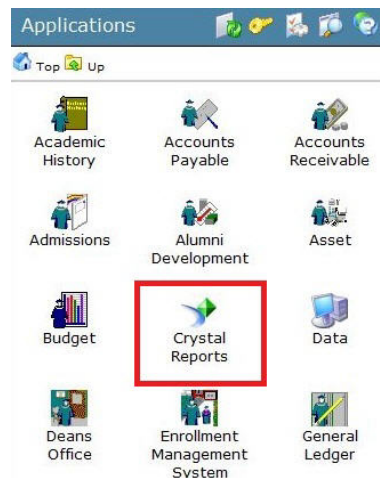
Repeat as needed. For a more detailed explanation of how to create a new user, see Section 10-7, *Create a New User*, in the *System Administration Reference Guide*.

## Database Connection

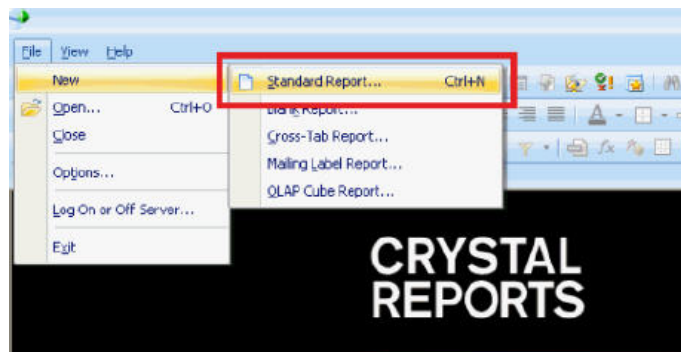
You must establish a database connection for each Crystal Reports user individually as part of their initial setup before he/she can use Crystal Reports. You only need to set up their connection once. The user will then be able to select the correct database connection under **My Connections**.


## Procedure

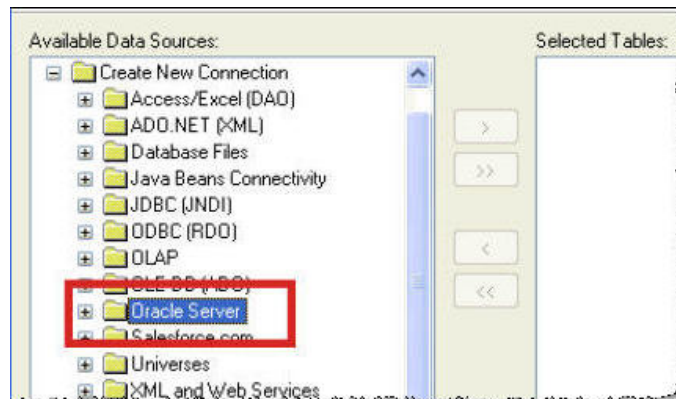
1. From the Citrix Senior Applications menu, click the Crystal Reports icon.



2. From the Crystal Reports Start Page, select **File > New > Standard Report**.



3. From the **Available Data Sources** list (left pane), click the expand button (  ) beside the Create New Connection folder. Then right-click the Oracle Server item and select **OPTIONS**.

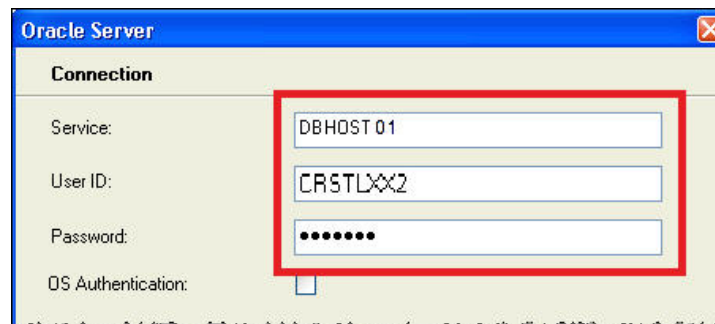


4. Within the Options window, enter your schema name in the **Owner Like:** field (i.e. SENIORXX; please [contact Product Support](#) if you are unsure what to enter here). Click **OK**.



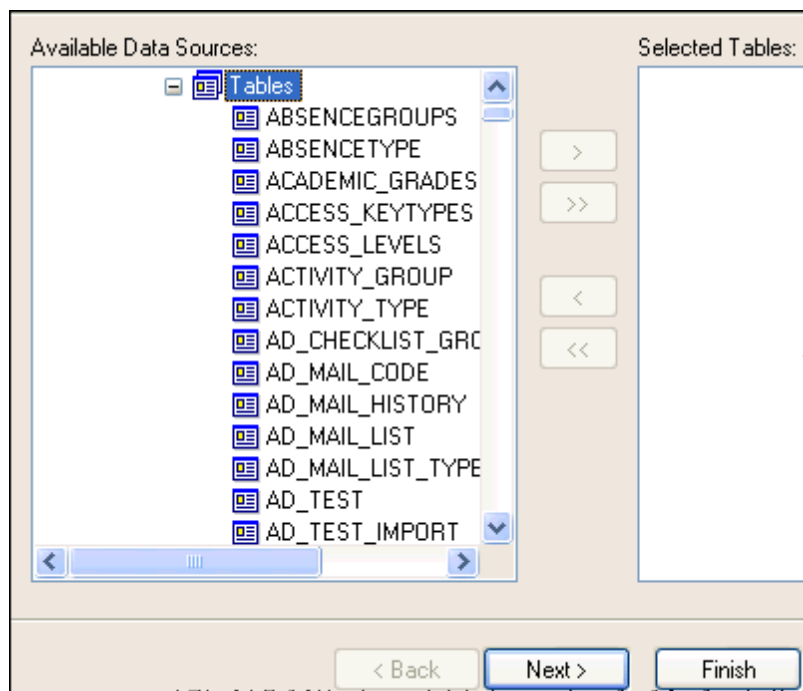


- Next, double-click **ORACLE SERVER** from the **Available Data Sources** list. Enter service name (provided by Senior Systems; please [contact Product Support](#) if you are unsure what to enter here) and the desired user ID and password for the new Crystal Reports user. Click **FINISH**.



The screenshot shows the 'Oracle Server' dialog box with the 'Connection' tab selected. A red rectangle highlights the 'Service', 'User ID', and 'Password' fields. The 'Service' field contains 'DBHOST01', the 'User ID' field contains 'CRSTLXX2', and the 'Password' field is masked with dots. The 'OS Authentication' checkbox is unchecked.

- Once setup is complete, the data connection is established and the data tables are available. In future, the connection will be available to the user under **My Connections**.



The screenshot shows the 'Available Data Sources' dialog box. The 'Tables' folder is expanded, showing a list of tables: ABSENCEGROUPS, ABSENCE TYPE, ACADEMIC\_GRADES, ACCESS\_KEYTYPES, ACCESS\_LEVELS, ACTIVITY\_GROUP, ACTIVITY\_TYPE, AD\_CHECKLIST\_GRC, AD\_MAIL\_CODE, AD\_MAIL\_HISTORY, AD\_MAIL\_LIST, AD\_MAIL\_LIST\_TYPE, AD\_TEST, and AD\_TEST\_IMPORT. The 'Selected Tables' list is empty. Navigation buttons include '< Back', 'Next >', and 'Finish'.