



Academics/Admissions Release Bulletin

August 2010

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About Release 91_8

In this release are significant changes and enhancements to Online Enrollment to improve the user payment interface, handling of check payments, management and formatting of templates in the Contract Editor, and approval and access to additional documents, and to add automated confirmation emails to users. There are additional enhancements to expand selection criteria for the Grade Entry Sheet Report, to provide the ability to select by division which students should appear in the Student/Parent directory of My BackPack, and to enable payment posting by division for Online Admissions and Online Enrollment.

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

Enhancements To Online Enrollment

There are several significant enhancements to Online Enrollment, affecting both My BackPack and the Enrollment Management application. Below is a brief summary of the major changes; details for most of these topics are contained in subsequent sections.

Online User Payment Interface - Several changes have been made to facilitate a smoother payment process for parents. In the Online Payment Setup, the option to redirect parents immediately to the payment page after contract submission has been changed, so that parents with multiple children are not redirected until all of their published enrollment contracts have been submitted. There is also a new option to only accept payments if the contract has been submitted.

On the online payment page, parents will now see, for each child, whether or not the contract has been submitted, and which payment items (if any) have already been paid, with logic to prevent accidental double-payment. Paying by check (if you allow it) is also more clear, with a 'Paying By Check' button that leads to the detailed check payment instructions and the opportunity to print a payment voucher on a separate screen, in a similar fashion to the other My BackPack online payment functions (though it will not show to the parent as 'Paid' until you have marked the payment received in Enrollment Management).

New Confirmation Emails and Broadcast Email Selection Criteria - There are two new automated confirmation emails for online enrollment which are sent whenever a parent submits an enrollment contract, and whenever an online payment is made. The templates for these emails are set up on the Confirmation tab of Email Template Maintenance in the Admin Community of My BackPack.

New selection criteria have also been added to the student/parent broadcast email creation screens which allow you to send only to addresses designated as 'Send Enrollment Contract', and for advanced recipient selection, you can designate whether or not the query should use 'Next Year' information.

Date and Number Formatting in the HTML Contract Editor - You now have more detailed control over the format of dates and individual numbers/amounts that are included in the contract or additional document templates via merge fields or formulas. There is also a new rounding function to give you more options for calculations.

Note that the default format for formula results and merge fields that display amounts has been changed slightly, so you will want to be sure to review the output for any existing templates that you intend to reuse, and adjust the formatting as needed.

Deleting/Managing Contract and Additional Document Templates - There is now a Manage Templates option on the Contract Editor menu (**File > Manage Templates**) which allows you to delete, copy, and rename templates, making it easier to create multiple versions of a template or to delete contract and additional document templates that you no longer need. Please note that you can only delete a contract template if all published contracts associated with it have been submitted or deleted. You can delete additional document templates at any time, however, you will want to make sure that the Additional Documents web page for parents does not contain a hyperlink to the document, as any links will no longer work.

Display of Payment Data/Handling of Check Payments - The Payment Type is now displayed on the Enrollment Contract Search screen as well as the Enrollment Document tab for approval, and more detailed data for all payments (including checks that are to be mailed in) is now displayed on the Payments tab. For pending payments by check, this makes you aware that the parent intends to pay by check, showing the amount and allowing you to follow up easily. Note that in the event of multiple payments, this field displays the most recent payment method.

Additional Document Approval Process and Document Access - The approval and retrieval process for additional documents has been significantly enhanced. The Enrollment Contract Search screen has been expanded to include information about additional documents (including links to view), and they are now subject to their own approval process. If additional documents are submitted after an enrollment contract has been approved, they generate a new listing on the search screen and allow you to access the screens for approval. You can easily view all contracts and additional documents right from links on the search screen without having to open the approval window, and at any time, all contracts and documents can be listed, sorted, viewed and saved/printed using a new View Submitted Documents function.

Online Enrollment User Payment Interface

Several changes have been made to Online Payment Setup for Online Enrollment, and to the screens that the users see when making enrollment deposit and other payments, to help minimize confusion and ensure that parents complete the process properly.

Online Payment Setup

The 'Redirect to payment page after submitting contract' option on the Online Payment Setup page has been changed to 'Redirect to payment page after submitting all published contracts'. For parents with multiple children, this option will wait until all of their published contracts have been submitted before automatically bring them to the payment page.

A second option has also been added to 'Only allow payment if contract has been submitted' so that parents cannot inadvertently make payment but forget to submit the contract.

Online Enrollment Setup

Documents Options Online Payment

Web Page Instructions

Name	Action
General Payment Instructions	
Check Payment Instructions	
Check Payment Voucher	

Options

Merchant Account:

☒ Allow credit card payments

Allow: ☒ American Express ☒ Discover ☒ MasterCard ☒ Visa

☒ Add convenience fee ☐ Percentage: 3.00 %
☒ Amount: \$ 5.00

☒ Allow payment by check

☒ Allow eCheck payments

☐ Add convenience fee ☒ Percentage: %
☐ Amount: \$

Comment Fields Setup:

☒ Redirect to payment page after submitting all published contracts

☒ Only allow payment if contract has been submitted

☒ Use the deposit amount from Enrollment Management

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Online Payment Pages

More detail has been added to the Online Payment page to indicate (for each child) whether or not the contract has been submitted, and which item(s) have already been paid. Parents will NOT be able to select for payment any of the already paid items. For parents with multiple children and schools with multiple payment items, it will be easier for parents to see what has been done already, and to avoid accidental double-payments.

In addition, the pay by check functionality (if allowed by your school) has been changed to match other online payment functions in My BackPack, where selecting the check payment method

displays a separate screen with the Check Payment Instructions and a button to optionally print a voucher to be included with the mailed-in check. In the case of Online Enrollment, the indication that a parent is mailing in a check and the applicable check amount is also submitted and displayed during the approval process in Enrollment Management, making it easier to follow up and track incoming checks.

Enrollment / Re-enrollment Online Payment Logged in as: Dr. Rosalind Albert

[Back to Enrollment Home](#)

We accept online payments using Visa or Mastercard. If you wish to pay by check, please print the check voucher, and mail with your check to Senior Academy.

The enrollment deposit for this year is \$500 for lower school and \$1000 for upper school, and this amount is non-refundable.

Please contact our office if you have any questions.

Adam Albert ✓ Contract Submitted	Sarah Albert ✓ Contract Submitted
<input type="checkbox"/> Enrollment Deposit - \$100.00 PAID	<input type="checkbox"/> Enrollment Deposit - \$490.00
Total Payment Amount: \$0.00	

Paying By Credit Card:

[Paying by Credit Card](#)

Paying By eCheck:

[Paying by eCheck](#)

Paying By Check:

[Paying By Check](#)

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Online Enrollment Confirmation and Broadcast Emails


There are now automatically generated confirmation emails (which can be personalized with merge fields) sent to parents whenever they submit an enrollment contract and whenever they make a payment. There are also some new selection criteria on the Student/Parent tabs for the Broadcast Email function to better support online enrollment-related broadcast emails.

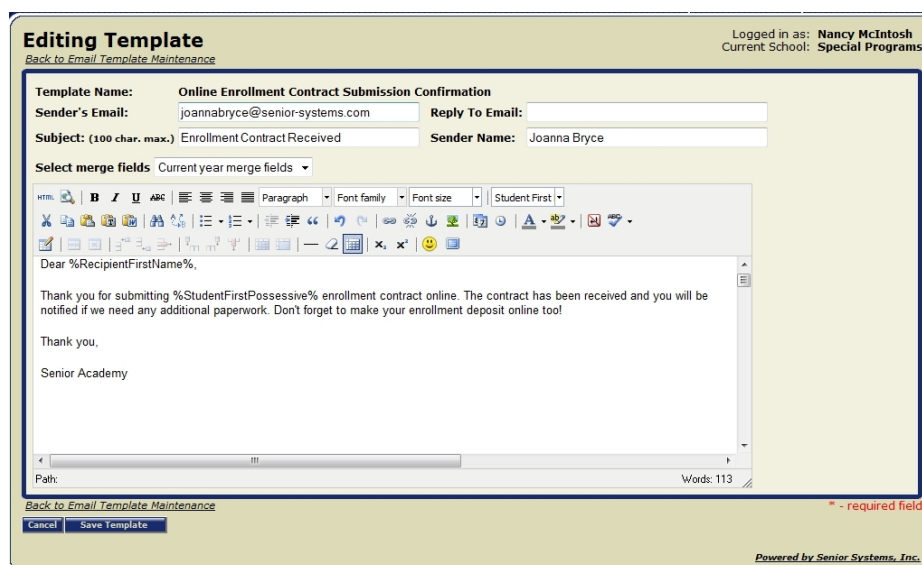
Confirmation Email Templates for Online Enrollment

To utilize the confirmation emails for Online Enrollment, you must set up templates to set the text and appearance for them. As with the other types of email templates in My BackPack, these can be customized with any text or graphics that you choose, using a word-processing type interface, and can be personalized with relevant merge fields such as Student Name, Grade, Payment Amount, etc.

For each template you must also specify the header information including the Sender's (From) Name and Email Address, an optional Reply To Email Address, and a Subject Line that will display in the recipient's inbox.

To create or edit the Online Enrollment email templates:

1. Select **Email > Template Maintenance** from the Admin Community of My BackPack. Then select the **Confirmation** tab.
2. Click the  Edit icon in the Action column next to the email template you want to work with.



The screenshot shows the 'Editing Template' window for an 'Online Enrollment Contract Submission Confirmation' email template. The interface includes a header with the user's login information (Nancy McIntosh, Special Programs) and a 'Back to Email Template Maintenance' link. The main form contains fields for 'Template Name', 'Sender's Email' (joannabryce@senior-systems.com), 'Reply To Email', 'Subject' (Enrollment Contract Received), and 'Sender Name' (Joanna Bryce). Below these is a 'Select merge fields' dropdown set to 'Current year merge fields'. A rich text editor follows, showing a draft email body with merge fields like '%RecipientFirstName%', '%StudentFirstPossessive%', and '%StudentFirst'. The editor includes a toolbar with various formatting options. At the bottom, there are 'Cancel' and 'Save Template' buttons, a word count of 113, and a 'Powered by Senior Systems, Inc.' footer.

3. Enter or change the header fields as required, and then enter or change the text or other content for the email using the Visual Editor. Use the Merge field dropdown as needed to personalize the email.

Note: You can refer to the related 91_8 Release Bulletin for more details about how to use the new Visual Editor.

4. When the template looks the way you want, click **SAVE TEMPLATE** to save changes.

It is recommended that you process a sample case as part of your pre-enrollment testing to make sure the emails look the way you want.

Changes to Student/Parent Broadcast Email Screens

A new option has been added to the Recipient Selection section of the Student/Parent tab for broadcast emails to enable the selection of just those addresses designated as 'Send Contract'.

Recipient Selection Options

* Select email recipients

☐ Students ☐ Primary Parents ☐ Secondary Parents ☐ Additional Contacts

Please note that the following options are not applicable to student recipients.

☐ Only include addresses marked as 'Send Contract'

Select email type: Home else Work

Select parent type: Both Father and Mother

For families with multiple children, generate: One email per family

☐ Check this box to override the 'Send Household Email' option on addresses

Also, on the Advanced criteria tab, there is now a checkbox where you can select to 'Use Next Year Information' when running the query, which is typically what you want to use when working with for enrollment-related data.

* Please select an existing query from the list below

Note: Any options selected on the 'Basic Tab' will be ignored. If you need

☒ Use Next year Information

The query you selected is: 9th graders


Queries

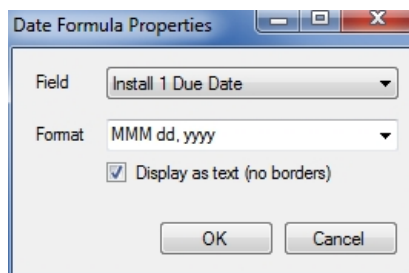
Enhancements to the Online Enrollment Contract Editor

Some new features have been added to the Contract Editor to give you greater control over templates and formatting.

Date Formatting

If you are inserting merge fields that contain dates into a template, there is a new Date Formula function that you can use to more precisely control the output format for the date.

To insert a date formula, position your cursor in the document and click the  Date Formula icon. Select the merge field and desired format from the dropdowns. You can optionally click to select the 'Display as text (no borders)' checkbox if you want the date to display as normal text rather than in a box, which is the default appearance. Then click **OK**.



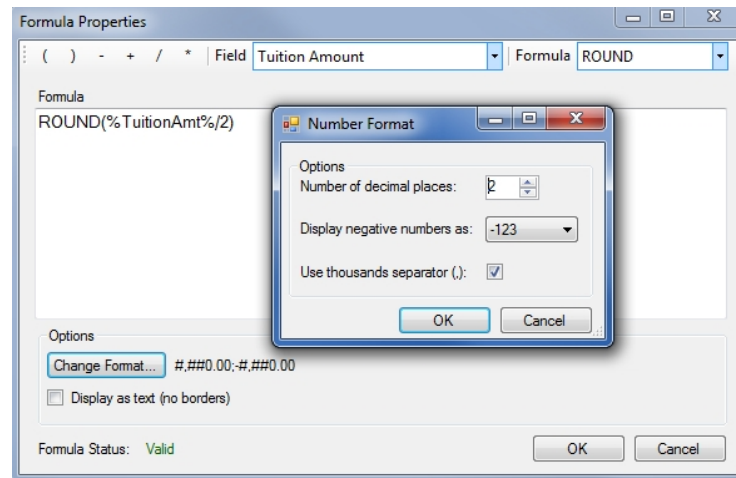
If you later need to edit the format for this field, click on it to select it, then right-click and select **Input Properties** to re-display the format dialog window.

Number Formatting and Round Function

You can now more precisely control number formats resulting from formulas or from merge fields that represent amounts (however, the merge field must be inserted as a formula or used in a formula calculation to access the formatting options). There is also a new Round function available as one of the formula calculations.

Note: The default format for formula results and merge fields that display amounts has been changed slightly. Previously, two decimal places would be displayed only if they were not equal to '00', in which case no decimal places would be displayed. The new default is to always show two decimal places. You will want to review the results for any existing contract templates to make sure this information appears the way you would like, and change the format of individual fields if necessary.

Whenever you enter or edit a formula, you can access the formatting choices by clicking **CHANGE FORMAT** in the formula window. You can then select the number of decimal places, the format for negative numbers, and whether or not to use a thousands separator, and then click **OK** to save your selections. You can also click to select the 'Display as text (no borders)' checkbox if you want the number to display as normal text rather than in a box, which is the default appearance.

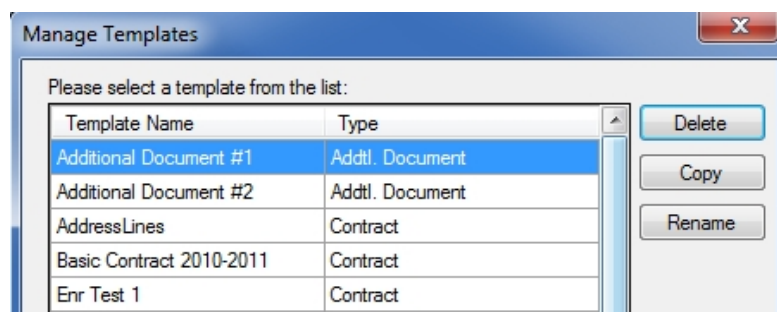


If you later need to edit the format for this field, click on it to select it, then right-click and select **Input Properties** to re-display the formula window and proceed as described above.

Managing Contract and Additional Document Templates

It is now easier to manage your template files, and to delete contract and additional document templates that you no longer need, with the Manage Templates option on the File menu in the Contract Editor. To use this new feature:

1. Access the Contract Editor if it is not already open (**Enrollment Contracts > Contract Editor** from the main menu in the Enrollment Management application).
2. Select **File > Manage Templates** from the main menu in the Contract Editor.



3. Click on a template name to select it, and then click to perform your selected operation:
 - **To remove the template file**, click **DELETE**, then click **YES** to confirm.
 - **To make a copy of the template**, click **COPY**. Enter a new (unique) name for the copy and click **OK**.
 - **To change the name of the template**, click **RENAME**. Enter a new name and click **OK**.
4. When you are finished, click **CLOSE**.

Viewing and Approving Online Enrollment Documents

The Enrollment Contract Search screen has been expanded with links to enable quick viewing of both enrollment contracts and additional documents, and to include information about the submission and approval status of all of these items.

Student Name	ID	Grade	City	State	Enrollment Contract				Other Documents				
					Published	Submitted	Deposit Paid	Payment Type	Approved	View	Submitted	Approved	View
Alex Abbott	4580	10	Marlborough	TX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Giovanni David Abbott, Esq. CPA	5987	8	Marlborough	TX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Credit Card	<input checked="" type="checkbox"/>	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Dwayne Abreu Sampaio Adams	0027060	11	Sunnyvale	TX	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input type="checkbox"/>	<input type="checkbox"/>	
William Harrison Adams	4640	2	Marlborough	TX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input type="checkbox"/>	<input type="checkbox"/>	
Lottie Lucia Adkins	0026966	5	Lewisville	TX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input type="checkbox"/>	<input type="checkbox"/>	
Penelope Albert	1061	9	Marlborough	TX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check	<input type="checkbox"/>	View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View
Amie Bernard	0027471	6	Marlborough	TX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input type="checkbox"/>	<input type="checkbox"/>	
Rolando Sanchez	00104	2			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	View	<input type="checkbox"/>	<input type="checkbox"/>	

You can click on a 'View' link to view, save, and/or print a PDF version of a contract or additional document. If there is more than one additional document for a student, clicking on the 'View' link brings up a sub-menu listing all of the recently submitted documents from which you can select the one you want to view. Once the contract and any additional documents have been approved, the student will no longer be listed on this screen; however, if additional documents are later submitted after the initial approval, the student will again show up on this screen to alert you to these additional document submissions.

New 'View Submitted Documents' Function

There is also a completely new function on the Enrollment Management menu (**View > Submitted Documents**) that helps you to view and manage all of the enrollment contracts and additional documents that have been submitted, both before and after approval. You can filter this list by Year, Document Type, and Document Name, and you can also define and use a query to limit the students for whom documents are displayed.

Grade Entry Sheet Report Grade Selection

The Grade Entry Sheet Report in My BackPack now allows you to select the specific grades/columns within each marking period that you want to display, which can include Conduct, Effort, and Other grades, where applicable.

Grade Entry Sheet Report Logged in as: Mrs. Lilly Abbott
Current School: Upper School

☐ Report by student
 Student: ☒ ALL All Students ☐ Selected

☒ Report by section
 Section: (2220-2) AP Statistics [T1,T2,T3] [06]

Marking Period and Grades to Report:

MidT1 ☐ MT1 **T1** ☒ T1 ☐ Exam
☒ Effort ☒ Cond. ☐ Other

MidT2 ☐ MT2 **T2** ☒ T2 ☐ Exam
☒ Effort ☒ Cond.

MidT3 ☐ MT3 **T3** ☒ T3 ☐ Exam
☒ Effort ☒ Cond.

Show: ☐ Section Comments ☐ Grade Comments
☒ School Name ☒ Advisor
 The Senior Academy

Faculty Name Format: Title First Middle(Init) Last, Suffix
 Student Name Format: Full Name ☒ Include Preferred Name
 View Report In: Report Preview

Grade Entry Sheet for (2220-2) AP Statistics [T1,T2,T3] [06]

Instructor: Mrs. Lilly Abbott

Room No:

Student ID / Name	Advisor	T1			T2			T3		
		T1	Effort	Cond.	T2	Effort	Cond.	T3	Effort	Cond.
4488 Christopher Jaehoon Allison	Mr. Gustafson Worthington									
2023 Elise Bagwell	Mrs. Elisha L. Cheung									
1808 Kristine Celeste Balderas	Mr. Flint Ceja									
3925 Marta Kathleen Barela	Dr. Dane V. Bass									
1684 Stacie Marie Barr	Mrs. Claudine Lynn Batista									
1599 Shelby Elizabeth Battles	Mr. Flint Ceja									

Include in Student Parent Directory By Division

You can now include/exclude students and parents from the Student/Parent directory on a division-by-division basis. This is helpful, for example, when you use Online Summer School Registration and need to make that division 'Active in the Student/Parent Community', but do not necessarily want to include those students in your online Student/Parent Directory. There is now a separate checkbox on the Schools Maintenance screen in System Administration to 'Display in Directory'.

The screenshot shows a window titled "Schools Maintenance - (Middle School)". It contains various fields for school information. The "Display in Directory" checkbox is highlighted with a red box.

Name	Security				
School I.D.	Middle	Sort	8	Abbrev	M
School Name	Middle School				
Address Line 1					
Address Line 2					
Address Line 3					
City/State/Zip					
Tel No.			Fax No.		
Grade/ Form	Grade				
Online Application Grade	Other Name 1				
S/P Community Name	Middle (Grades 5-8)			<input checked="" type="checkbox"/> Active in the S/P Community	
				<input checked="" type="checkbox"/> Display in Directory	
School Type	Academic				
Valid in Admissions, Business Office and Academic Products Not valid in Summer School and Extended Programs					
OK Cancel					

Initially upon upgrading, this box will be checked for any schools (divisions) that are currently active in the Student Parent Community. You may want to review all of your divisions, and change this setting where appropriate.

Payment Posting By Division For Online Admissions and Enrollment

If you have the Accounts Receivable application installed and you use Online Admissions and/or Online Enrollment, you can now set the general ledger accounts for online payments separately by division (as is already the case for Online Summer School Registration), giving you finer control over the account mapping for these payments. The G/L accounts are set via the Administration Maintenance function in the Accounts Receivable application (Online Payments button). For the Online Admissions and Online Enrollment tabs, there is now a School dropdown at the top of the screen to select the school/division that you want to work with.

Initially upon upgrading, these accounts will all be set to the current value for each division. You can use Administration Maintenance to review and revise any of these as necessary:

1. In the Accounts Receivable application, select **Maintenance > Administration Maintenance > Accounts Receivable** and click **ONLINE PAYMENTS SETUP**. Then select either the **Admissions** tab or the **Enrollment** tab, and use the drop down at the top of the screen to select the school or division that you want to work with.

Online Payment Posting Options

Admissions | Enrollment | Summer School | Accounts Receivables

School: Lower School ☒ Post Online Admissions Payments

Batch Description: A/R Online Admissions Receipts

Cash Account: 11102
Checking Chase

Revenue Account: 1448270000 Subledger:
Miscellaneous Income

Convenience Fee Account: Subledger:

Posting Reference:

OK Cancel

Online Payment Posting Options

Admissions | Enrollment | Summer School | Accounts Receivables |

School: Middle School ☒ Post Online Enrollment Payments

Batch Description: A/R Cash Receipts Posting

Cash Account: 1441470000 Non Return Deposit

Convenience Fee Account: 1520577088 Subledger: Convenience Fees - DiamondMind

Posting Reference: Convenience Fee

OK Cancel

2. Check the box next to the dropdown to enable posting for this payment type and division if it is not already checked. Then enter or change any of the G/L accounts or other fields as necessary. You can click the Search icon to use the search feature for any of the account fields.
3. Repeat this process for all divisions to make sure that each is set properly.
4. Click **OK** to save changes when all settings are complete.