



Business Office Release Bulletin

April 2012

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About Release 92_2 Business Office Features

This Release Bulletin describes the 92_2 Release changes and enhancements to the Advantage Business Office products. The major new features involve the enhancement of the Media tabs for Faculty and Vendor records, including the ability to associate media items with specific invoices, and to publish faculty-specific documents to My BackPack. There are also a few other miscellaneous changes and enhancements to existing features, including a fix to the Campus Store inventory logic that synchronizes on hand quantity with inventory quantity by inserting a one-time adjustment if needed.

Please contact Support@senior-systems.com if you have any questions about any of these new features.

Business Office Enhancements

Vendor Media - The new Media tab in Vendor Maintenance and the new vendor media import function give you the ability to import, access, and manage vendor-specific and invoice-specific media files easily and efficiently. See [Vendor Media Tab Enhancements](#) for details.

Faculty Media - Any media stored on the Faculty Media tab can now be published to a faculty member's My BackPack account. There are several new fields for faculty media associated with this enhancement, as well as changes to media security. See [Faculty Media Tab Enhancements](#) for details.

Fixed Assets - You can now search and sort assets based on Disposal Status. On the Asset Maintenance screen in the Fixed Assets application, click the **OPTIONS** button, then use the checkboxes to set the 'Disposed' column to visible and/or searchable.

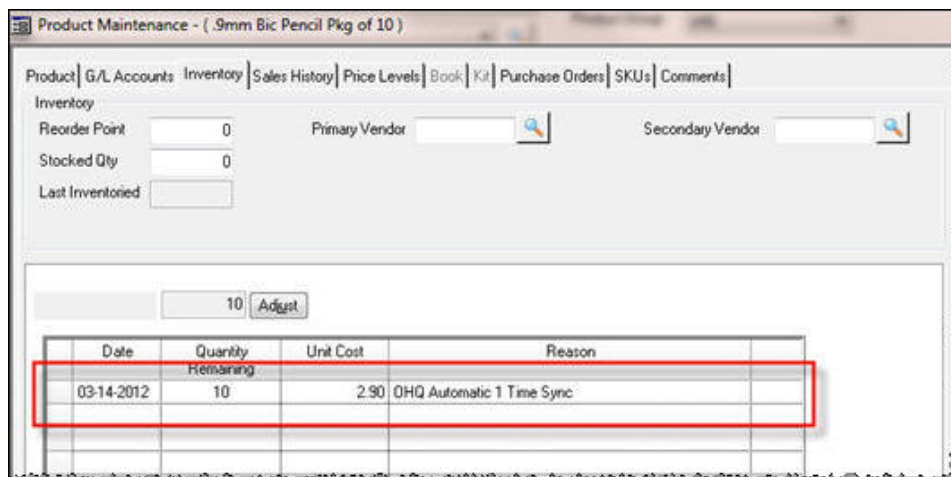
Code Maintenance Change - Citizenship to Country - Previously, some schools could use a field titled 'Country' in code maintenance, while for others, the same field was titled 'Citizenship'. In order to synchronize data structure, that field is now titled 'Country' for ALL schools.

Editing Work Addresses - Now, when My BackPack users edit their 'Other' and 'Work' addresses in My BackPack, the system does NOT change the value of that address's bill code by default. Previously, when a My BackPack user edited Work or Other addresses in My BackPack, in some cases the system would automatically set the newly edited address to receive the 'Original' bill, and change the bill code in the Accounts Receivable application.

Cash Receipts Batch Print Order - In the Accounts Receivable application, the behavior of the 'Print' function for saved batches has been set so that 'Preview' and 'Print' will list items in the order in which they were entered, by default. This makes it easier for multiple people editing or reviewing the same saved batch to keep track of cash receipt postings.

Campus Store - Fix to Synchronize On Hand Quantity With Inventory Quantity - Over the past several years we have received sporadic reports from customers indicating a discrepancy between the On Hand Quantity (Product Maintenance – Inventory tab) and the inventory quantity calculated from receipts and sales of products. The 92_2 Release update will correct this On Hand Quantity number to now match inventory.

The update will first determine if there was a discrepancy between your On Hand Quantity and your inventory. If a discrepancy is discovered then an adjustment line like the one shown below will appear indicating **"OHQ Automatic 1 Time Sync"** in either the Receipt and/or Inventory tab in Product Maintenance. Please note that any adjustments made to the On Hand Quantity will not have an impact on your actual inventory or General Ledger.



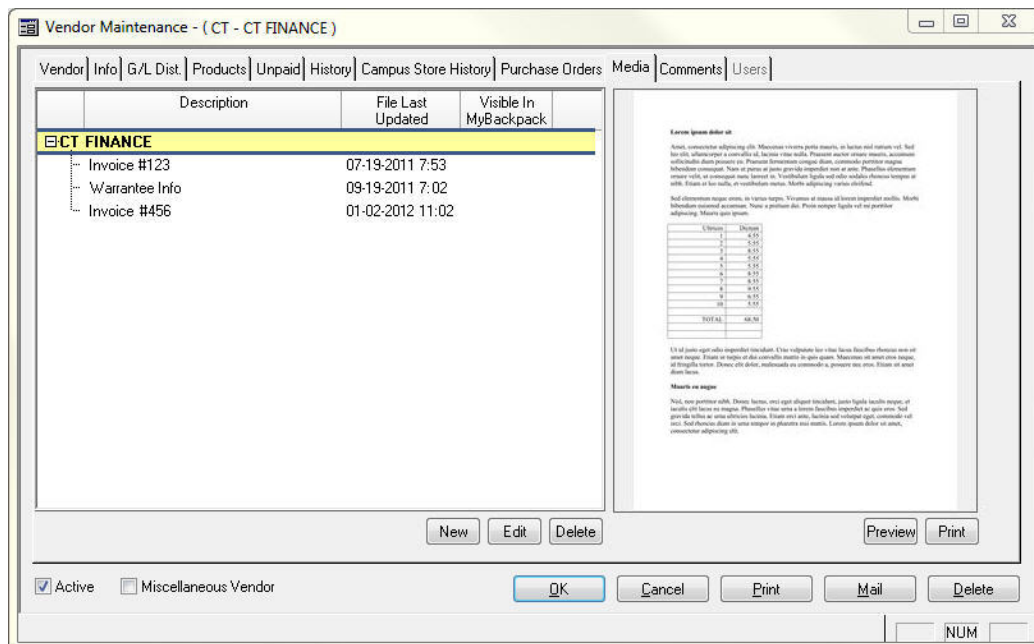
Vendor Media Tab Enhancements

Similar to the recent redesign and enhancements for Student and Inquiry/Applicant Media tabs, the Vendor Media tab has been re-designed. Images or documents can be uploaded and stored to a vendor's record, and even to a specific invoice. The detail screen for a media item now has some new fields, including optional new security controls for specific documents. See below for more details about how to use all of the new features associated with this enhancement.

Vendor Media Tab


The Vendor Maintenance Media tab displays all files relating specifically to the vendor, whether to the vendor record in general or to a specific invoice. For each media item, you can see the Description and File Last Updated Date. No vendor media files will be visible in My BackPack. Clicking on a media item in the list displays a thumbnail preview in the right pane (for some file types), and for PDF thumbnails, you can actually scroll through the pages, and/or you can adjust the zoom by right-clicking on the image, selecting 'Zoom', and then selecting an action. There are also buttons below the thumbnail to bring up a full-size preview or to print the item (for appropriate file types).

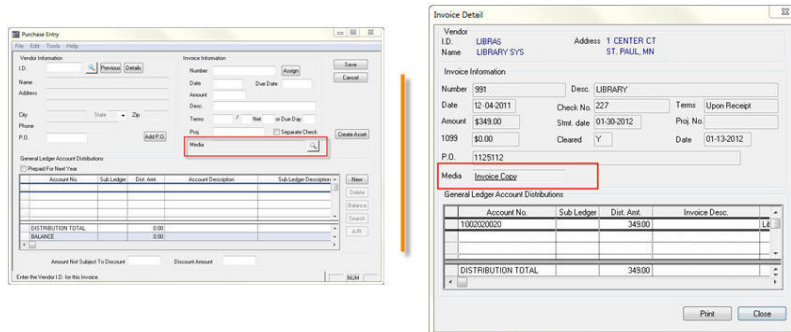
Media files associated with a specific invoice can also be found directly on the invoice, or can be viewed from the new Media Archive column on the invoice grid of the vendor's History or Unpaid tabs.



Adding Vendor Media

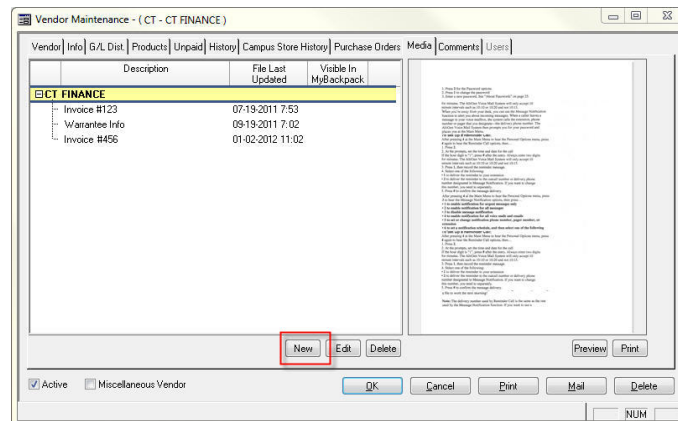
These enhancements allow for several ways for you to enter and use vendor media files.

- **As part of the Purchase Entry process**, click the  Search icon on the Purchase Entry screen to browse to the file you wish to upload and associate with that specific purchase. Once the file is uploaded, you can set up your options on the Media Entry details screen. This file will be available on the invoice record, as a smart link on the vendor's transaction history grid, and from the Vendor Maintenance Media tab.



The left screenshot shows the 'Purchase Entry' window. The 'Media' field is highlighted in red. The right screenshot shows the 'Invoice Detail' window. The 'Media' field is highlighted in red.

- **Directly from a Vendor's media tab**, click **NEW** and browse to the file you wish to upload. Once the file is uploaded, you can set up your options on the Media Entry details screen.



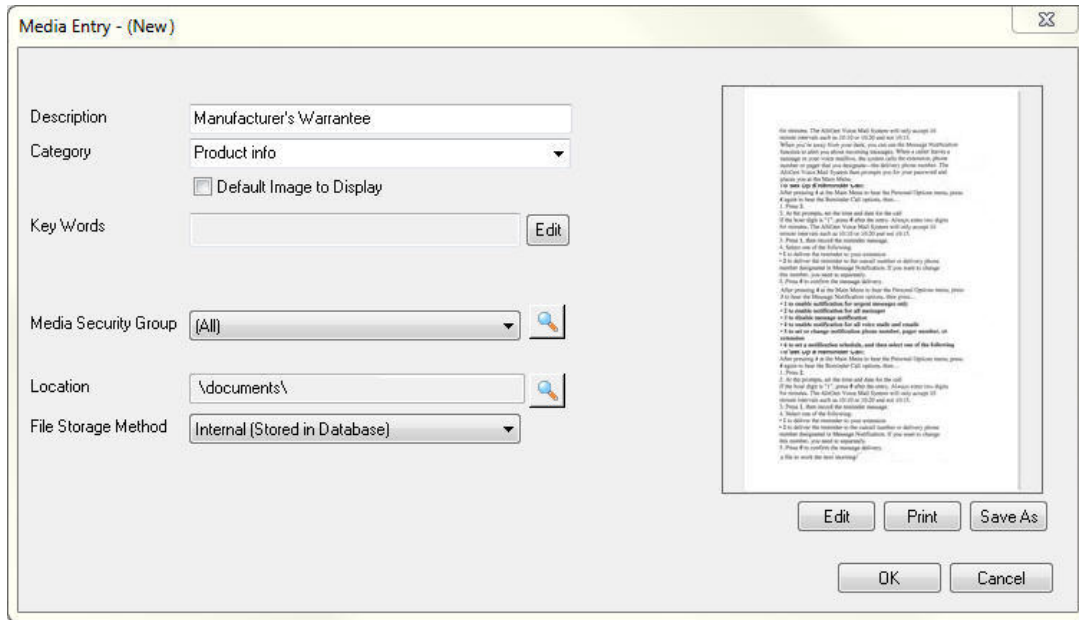
The screenshot shows the 'Vendor Maintenance - (CT - CT FINANCE)' window. The 'Media' tab is selected, and the 'New' button is highlighted in red.

Description	File Last Updated	Visible In MyBackpack
CT FINANCE		
Invoice #123	07-19-2011 7:53	
Warranty Info	09-19-2011 7:02	
Invoice #456	01-02-2012 11:02	



- **Using the media import tool** in the System Administration application, you can upload multiple media files to vendor records at once. The import tool gives you a way to associate files with specific invoices after invoices are entered. The file upload tool in the Accounts Payable application can only be used to add media to an invoice when the invoice is initially created. (The **NEW** button on a vendor's media tab can be used to upload files at any time, but does not give you a way to associate the file with a specific invoice.) This feature is described in detail in a following section.

Vendor Media Entry Details

The Media Entry details screen, displayed when you add a new media item or edit an existing media item for a vendor or invoice, has several options as well as a right pane thumbnail preview. These fields relate to the file itself and how it is controlled within the database.



Field	Usage/Remarks
Description	Your name for this item (displayed on both Media tab and invoice record, if applicable)
Category	You can select from the list of media categories defined for your school, if any. This list of categories can be maintained via Code Maintenance in the System Administration application.
Default Image to Display	Not applicable in Accounts Payable.
Key Words	If you wish to list keywords for media items, click EDIT to the right of the field, enter or edit the list of keywords, and then click OK .

Field	Usage/Remarks
Media Security Group	You can assign one or more media security groups to limit internal access to this item to specific user groups. You can select a single group or 'All' from the dropdown, OR select 'Some' or click the  Search icon to select multiple items from the list. See the discussion about media security in the next section for more details about media security setup.
Location	This displays the location from which the file was uploaded. Click the  Search icon to browse and navigate to a new file for upload and then click OPEN . If you upload a new file for an existing media item, the prior version will automatically be replaced with the new upload.
File Storage Method	The storage method indicates whether or not the media file itself is stored as part of the database or externally on your network. (Previously, all image files were stored internally, and all other media files were stored externally.) You can change this field at any time to change the storage method (and effectively copy the file to the database or to the network media location).


The right pane preview includes buttons that allow you to edit the actual media item (if possible, based on the file type and the programs available on your system--e.g. you can edit a Microsoft Word document with the MS Word program), print (where applicable), or download a copy to your computer or network using 'Save As'.



Editing Vendor Media

Once a media file has been saved to a vendor record, via purchase entry, direct upload to the media tab, or media import, it is possible for a database user to edit the media file on two conditions: the user must have the appropriate security permissions, and the user must have access to the appropriate program to edit the desired file type.

IMPORTANT: Before opening a file for editing, you may need to close all other instances of the program you plan to use if you are already running that program. Otherwise, due to the behavior of some external applications, you may encounter difficulty saving changes to media files stored within your database. For example, if you plan to edit a MS Word file and you already have MS Word open on your computer, you should close all MS Word windows before opening the media file for editing.

To edit a file stored within the database, open the Media Entry screen (from the Vendor media tab). If you are able to edit the file based on your security permissions and the programs available on your local machine, the **EDIT** button will be available below the file preview pane. The **EDIT** button automatically launches the appropriate program (as long as it is available on your computer) and allows you to edit the file. To save your changes, click the program's  Save icon or click **File > Save**. You may also encounter a dialog asking if you wish to update the document archive. Click **YES** to save changes to the file within your database.

IMPORTANT: DO NOT use Save As or attempt to save in a different location or file folder! If you do so, your changes will NOT be saved in your database.

Changes to Media-Related Security Keys for Database Users

Media security keys - Previously, there was a 'Media' security key below **Accounts Payable > Maintenance > Vendors**. A user had to have this security key in order to add, remove, or change properties for media items. There are now two additional security keys, beneath the Media key, that control database users' ability to view and edit media.

Media - Allows the user to add media to a vendor's record. Users with only the Media key (with none of the media sub-keys) will have read-only access to media files.

Edit Media Information - Allows the user to edit a media item's settings. Users with this key will be able to edit media file settings on the Media Entry and Publishing tabs.

Modify Saved Media Document - Allows the user to edit the media item itself (for example, to edit the text of a MS Word document).

Upon database update, this new security key is automatically added for users and groups who previously had the 'Media' security key, so no changes are required unless you want to remove this capability from selected users or groups.



New Feature - Media Security Groups

You can optionally limit access (for internal database users) to specific media items using the new Media Security Groups feature. Media security groups are set up via a new function (Media Security Group Maintenance) on the new Documents menu in the System Administration application. Each media security group can include one or more user groups (from User Maintenance). You can then assign one or more media security group(s) to a specific media item on the Media Entry Details Media tab. Any user in any of the included groups will then have access to the media item.

For example, if you have separate database user security groups for 'Purchasing Coordinator', 'Coaching Staff', and 'Middle School Faculty', you could set up a media security group called 'School Sports' that includes just the 'Purchasing Coordinator' and 'Coaching Staff' user groups. Any media items that are assigned a Media Security Group of 'School Sports' would be viewable to database users in the 'Purchasing Coordinator' and 'Coaching Staff' groups, but not to database users only in the 'Middle School Faculty' group. Depending on your current setup for database user security groups, you may find it easiest to create some new database user groups just to facilitate the setup for your media security groups.

Vendor Media Import

The Media import function, found in Senior System Administration, is almost identical to the existing Student, Faculty, and Constituent media import functions. You can use the Media Details screen to set up your media file options, you can control these options via your import mapping file, or you can use a combination of the two. When creating your import mapping file, the field order is as follows:

```
"<vendor ID>","<file name>","<category>","<keywords>","<invoice number>","<media description>"
```

Vendor ID and File Name are required fields; other values are optional, and can be set using the Vendor Media Import manager, or as part of the import mapping file. If you want to skip certain fields in your import mapping file (for example, if you want to use the Media Details screen to name your files, but want to use the import mapping file to associate files with specific invoices), be sure to use placeholders for unspecified values. For example, to map only a vendor, file, and invoice number, your entry would use the following format:

```
"<vendor ID>","<file>","","","<invoice number>"
```

Note that vendor IDs are case sensitive. See the System Administration Reference Guide for further details about the media import function.

Note: In order to access the vendor media import function in the System Administration application, users will need the associated security key. Be sure to add this key to any users or user groups who need to access this tool.





Faculty Media Tab Enhancements

Similar to the recent redesign and enhancements for Student and Inquiry/Applicant Media tabs, the Faculty Media tab has been re-designed. As with student media, any images or documents attached to faculty records in the Accounts Receivable, Summer School, or Registrar applications can optionally be "published" to faculty in My BackPack on the My Documents page, and the media tab shows the publishing status of each item. In addition, the detail screen for a media item has some new fields (including optional new security controls), and there is a separate tab for publishing data. See below for more details about how to use all of the new features associated with this enhancement.

Note: If you intend to publish Faculty community-related documents in My BackPack, keep in mind that faculty members must have a web account to access them. This will not likely be an issue, but it will affect those who may not have used My BackPack previously. You can assign web accounts during new faculty processing, or you can create My BackPack accounts for existing faculty in Faculty Maintenance. See the My BackPack Administrator's Guide (or online help for the Admin Community) for more details about how to create web accounts.

Faculty Media Tab

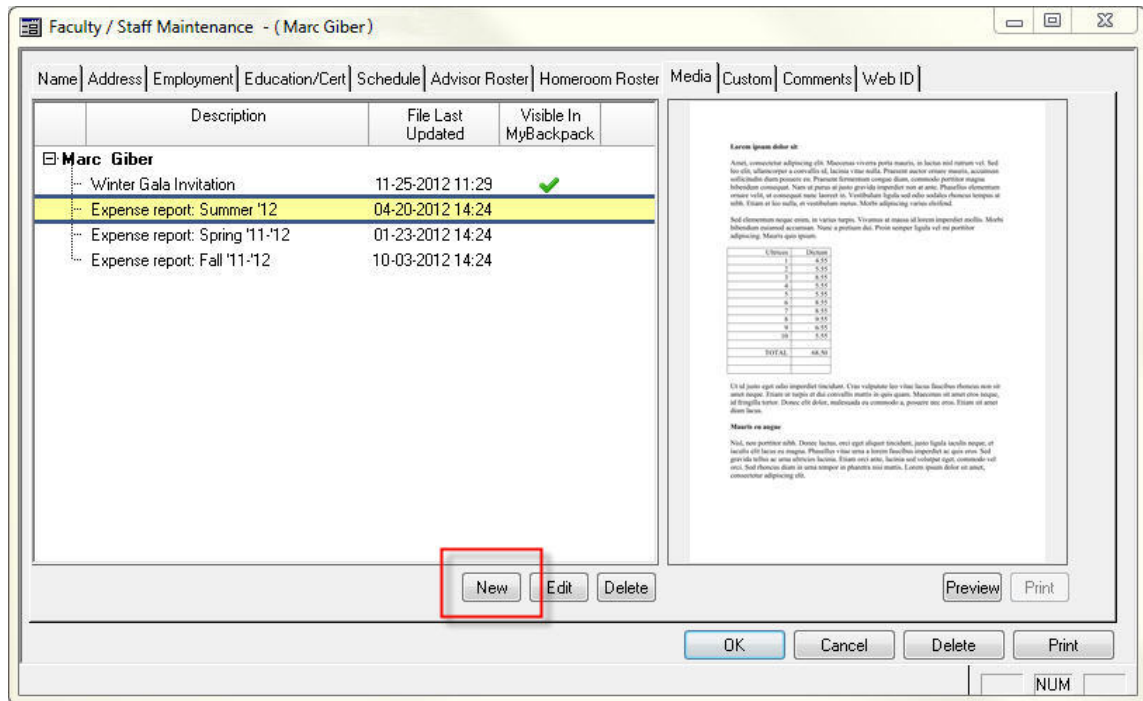
The Faculty Maintenance Media tab displays all files relating specifically to the faculty member. Clicking on a media item in the list displays a thumbnail preview in the right pane (for some file types), and for PDF thumbnails, you can actually scroll through the pages, and/or you can adjust the zoom by right-clicking on the image, selecting 'Zoom', and then selecting an action. There are also buttons below the thumbnail to bring up a full-size preview and/or to print the item (for appropriate file types).

For each media item, you can see the Description, File Last Updated Date, and whether or not it is currently visible in My BackPack on the individual's My Documents page. A  green check indicates that the item is published and the individual can view it in My BackPack, meaning that the document is published (for a past or current date/time) and has been made visible for the user, AND the user has a My BackPack account (note that you CAN publish to a user who does not yet have a My BackPack user account and he/she will automatically have access when the web account is later created). A  warning icon indicates that the item is published, but is not visible to the individual for some reason (because he/she is not a web user, or the item is published for a future date--hover over the icon to see the reason(s)). To change publishing or access for a media item, click on the row to select it and then click **EDIT** (or just double-click) to access the Media Entry Details screen.

Adding Faculty Media

These enhancements give you several ways to enter and use faculty media files.

- **On the faculty member's record**, you can now upload a file directly to the Media tab. Click **NEW** to browse and navigate to a new file for upload.





- **Using the media import tool** in the System Administration application, you can upload multiple media files to faculty records at once. See the System Administration Reference Guide for further details about the media import function.

Faculty Media Entry Details

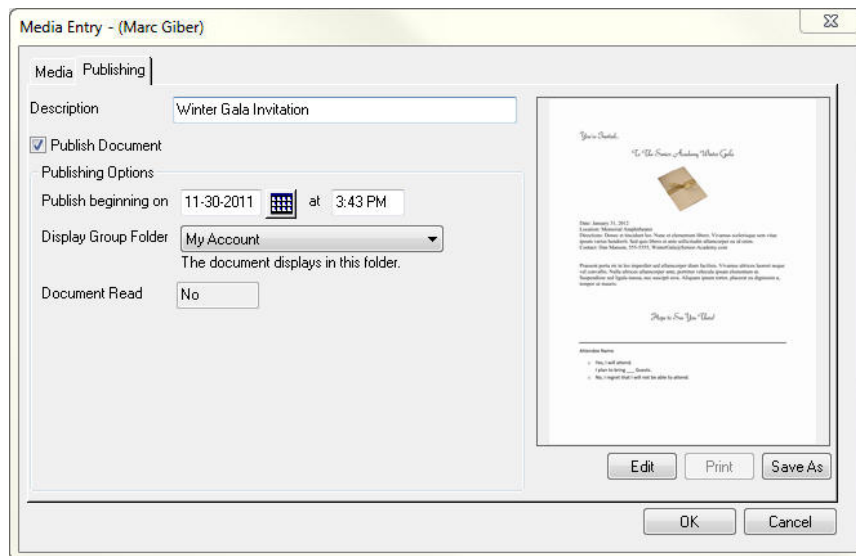
The Media Entry details screen, displayed when you add a new media item or edit an existing media item for a faculty member, has two tabs of information as well as a right pane thumbnail preview:

- The **Media tab** includes all of the previously existing fields for media items, with a couple of new additions, as explained in more detail below. These fields relate to the file itself and how it is controlled within the database.

Field	Usage/Remarks
Description	Your name for this item (displayed on both Media Entry tabs); keep in mind that if this item is published in My BackPack, this is the Document Name that web users see.
Category	You can select from the list of media categories defined for your school, if any. This list of categories can be maintained via Code Maintenance in the System Administration application.
Default Image to Display	Use this checkbox to indicate that you want the media file to appear as the individual's default image.
Key Words	If you wish to list key words for media items, click EDIT to the right of the field, enter or edit the list of key words, and then click OK .

Field	Usage/Remarks
Available In	Indicates whether this item is available in Accounts Receivable, Registrar/Summer School, or both.
Media Security Group	You can assign one or more media security groups to limit internal access to this item to specific user groups. You can select a single group or 'All' from the dropdown, OR select 'Some' or click the  Search icon to select multiple groups from the list. See the discussion about media security in the next section for more details about setting up groups.
Location	This displays the location from which the file was uploaded. Click the  Search icon to browse and navigate to a new file for upload and then click OPEN . If you upload a new file for an existing media item, the prior version will automatically be replaced with the new upload.
File Storage Method	The storage method indicates whether or not the media file itself is stored as part of the database or externally on your network. (Previously, all image files were stored internally, and all other media files were stored externally.) If you plan to publish this file to My BackPack, you will need to select the 'Internal' option. You can change this field at any time to change the storage method (and effectively copy the file to the database or to the network media location).

- The **Publishing** tab is all new, and contains fields related only to publishing the item in My Backpack. If you do not publish any media items to My Backpack, you do not need to use this tab.



Field	Usage/Remarks
Description	Your name for this item (displayed on both Media Entry tabs); keep in mind that if this item is published in My Backpack, this is the Document Name that web users see.
Publish Document	Check this box to "publish" this document to My Backpack, or un-check it to "un-publish" the document. Published documents are displayed in My Backpack on the My Documents page for each user.
Publish Beginning On	If you want to control when the document becomes available in My Backpack, you can enter a future start date and time; otherwise, this field defaults to the current date and time for immediate availability.
Display Group Folder	On the My Documents page in My Backpack, you can optionally group documents into folders for better organization. See the discussion about how to control publishing to My Backpack in a following section for more details about document folder setup and maintenance. If you do not specify a Display Group Folder, you will receive a warning message when you click OK to save the media entry, indicating that the document will be listed at the root level for the user.


- The **right pane preview** includes buttons that allow you to edit the actual media item (if possible, based on the file type and the programs available on your system--e.g. you can edit a Microsoft Word document with the MS Word program), print (where applicable), or download a copy to your computer or network using 'Save As'.



Editing Faculty Media

Once a media file has been saved to a faculty member's record, it is possible for a database user to edit the media file on two conditions: the user must have the appropriate security permissions, and the user must have access to the appropriate program to edit the desired file type.

IMPORTANT: Before opening a file for editing, you may need to close all other instances of the program you plan to use if you are already running that program. Otherwise, due to the behavior of some external applications, you may encounter difficulty saving changes to media files stored within your database. For example, if you plan to edit a MS Word file and you already have MS Word open on your computer, you should close all MS Word windows before opening the media file for editing.

To edit a file stored within the database, open the Media Entry screen (from the Faculty Media tab). If you are able to edit the file based on your security permissions and the programs available on your local machine, the **EDIT** button will appear below the file preview pane. The **EDIT** button automatically launches the appropriate program and allows you to edit the file. To save your changes, click the program's  Save icon or click **FILE > SAVE**. You may also encounter a dialog asking if you wish to update the document archive. Click **YES** to save changes to the file within your database.

IMPORTANT: DO NOT use Save As or attempt to save in a different location or file folder! If you do so, your changes will NOT be saved in your database.

Media-Related Security for Database Users

Media security for database users can be controlled by a combination of security keys managed in the System Administration application, per user or per user group, and media security groups.

- **Media security keys** - Three faculty media security keys control database users' ability to view and edit media.

Media - Allows the user to add media to a constituent's record. Users with only the Media key (with none of the media sub-keys) will have read-only access to media files.

Edit Media Information - Allows the user to edit a media item's settings. Users with this key will be able to edit media file settings on the Media Entry and Publishing tabs.

Modify Saved Media Document- Allows the user to edit the media item itself (for example, to edit the text of a MS Word document).

Upon database update, any user (or user group) with the Media key and Edit sub-key automatically receives the two new media security keys. Users (or user groups) with only the Media key before database update will not receive the new media security keys.



- **Media security groups** - You can optionally limit access (for internal database users) to specific media items using the new Media Security Groups feature. Media security groups are set up within the System Administration application, under **Documents > Media Security Group Maintenance**. Each media security group can include one or more user groups (from User Maintenance). You can then assign one or more media security group(s) to a specific media item on the Media Entry Details Media tab. Only the user(s) in the included group(s) will have access to the media item.

For example, if you have separate database user security groups for 'Advisors', 'Guidance Counselors', and 'Middle School Faculty', you could set up a media security group called 'Placement Testing' that includes just the 'Advisors' and 'Guidance Counselors' database users. Any media that are assigned the Media Security Group 'Placement Testing' would be viewable by database users in the 'Advisors' and 'Guidance Counselors' groups, but would not be viewable by database users who were only in the 'Middle School Faculty' group. Depending on your current setup for database user security groups, you may find it easiest to create some new database user groups just to facilitate the setup for your media security groups.

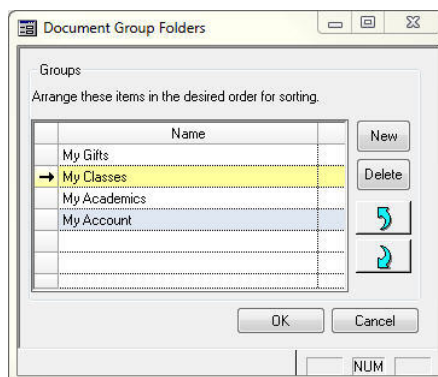
Publishing Faculty Documents to My Backpack



Step 1 - [Optional] Setup for Document Folders for Publishing:

If you want to organize documents into folders in My Backpack for ease of presentation and user navigation, you will need to set up those document group folders ahead of time. Then, at the time of document publishing, you can determine in which folder the document should appear. Keep in mind that you can add new folders later, so you don't have to decide on the entire list in advance.

To set up or maintain document group folders for My Backpack:

1. Select **Documents > Group Folder Maintenance** from the main menu in the System Administration application.



2. **To add or edit document group folders**, create or select the document group folder to work with:
 - **To add a new document group folder**, click **NEW**. Type the Name into the new blank row in the table.
 - **To edit a document group folder**, click on the row to select it. You can then edit the Name field, or use the  Up and  Down buttons to move it to a different location in the display sequence.
 - Click **OK** to save changes.
3. **To remove a document group folder**, click on the row to select it and click **DELETE**. Then click **YES** to confirm.

Note: If there are any documents currently published to that folder, you will receive a warning that those documents will be moved to the root level for all affected users. You can then choose to continue with the operation or cancel.

Step 2 - Make Specific Documents Available in My Backpack:

All publishing and user access controls for a media file are found on the Publishing tab of the Media Entry Details screen. To publish a document (or modify a document's publishing settings), open the Faculty Media tab, select to edit an existing item from the list, and change the settings as needed on the Publishing tab of the Media Entry Details screen (at least to check the 'Published' box for the item). Unless you selected to publish for a future date and time, the document(s) will then be available to the faculty member in My Backpack.

Viewing Documents in My Backpack

My Backpack users can access their published documents via the My Documents link on their My Backpack landing page. There is a table for web user documents that is always visible on the My Documents screen. The user can toggle the display for this table between list and folder view. Any "unread" documents will display in bold (and the number of unread documents will appear in parentheses on the landing page next to the My Documents menu item, so users know to check the page when new documents are available). Clicking on a document name opens the document in a separate tab/window where possible; users can download a document using the right-click context menu for Windows or Mac. Some users who are members of other My Backpack communities (such as parents) may already be familiar with using the My Documents page and may also have other types of documents available.

List View:

Display: List View Only Show Documents For: (All)

Document	Name	Folder	Published Date
Fall '12 Advisee Roster	Marc Giber	My Classes	Feb 16, 2012
Winter Gala Invitation	Marc Giber	My Classes	Nov 13, 2012

Folder View:

Display: Folder View Only Show Documents For: (All)

My Classes

- Fall '12 Advisee Roster Marc Giber Feb 16, 2012
- Winter Gala Invitation Marc Giber Nov 13, 2012