

My BackPack Profile Changes for Alumni/Development and Student/Parent Applications

My Backpack Profile Feature

Significant changes have been made to the way profile changes are approved for registered **My Backpack** users. Please read this walk-through before approving any profile changes.

Composing a Note

Users of **Student/Parent Addresses** and **Alumni Development** can now compose a note to the school by clicking **Enter a note to the school** on the upper right corner of **View/Manage My Profile** window.

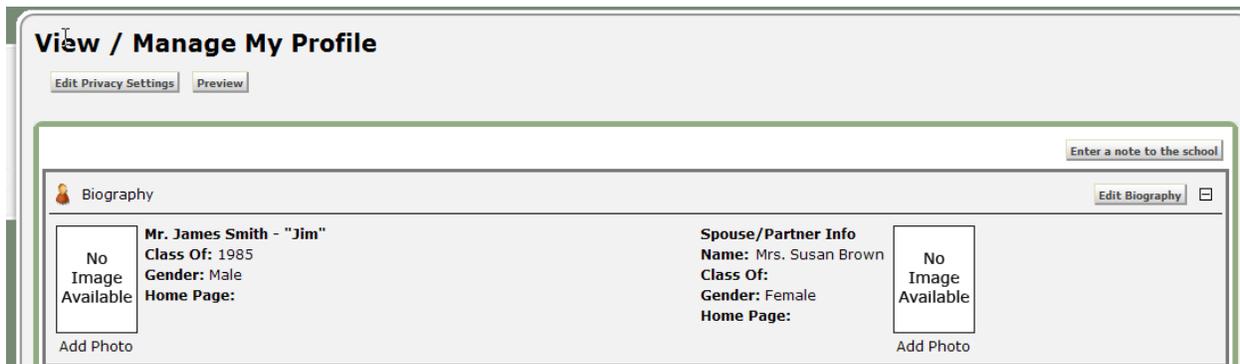


Figure 1. A new button in the upper right hand corner allows the user to send a note to the school.

The **Add Note** window appears allowing you to compose a note back to the school.

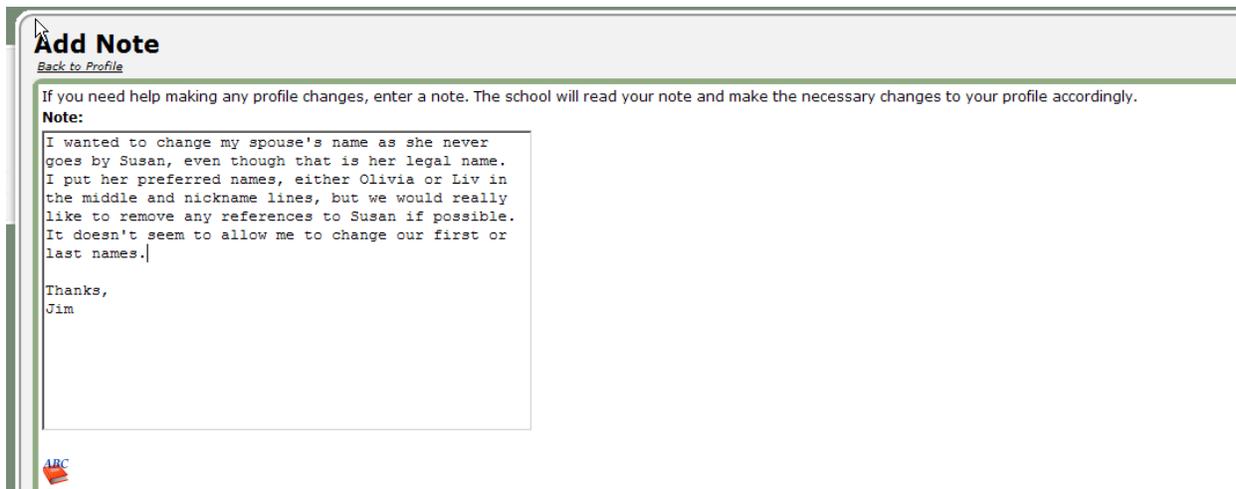


Figure 2. Composing a Note to the School

This note then appears in the profile approval window.

Editing Biographic Information

Users can no longer indicate a divorce by editing their own biography, nor can they alter their first or last name or that of their spouse. This ability was removed to avoid the confusion caused when a user had changed his/her spouse's name.

In this scenario, Mr. James Smith has logged on to edit his profile. After adding some name information for both himself and his spouse, he also changes his address. Up until this point in the school's part of the process, nothing has changed.

The screenshot displays a web form titled "Edit Biographic Information" with three buttons: "Submit", "Reset", and "Cancel". The form is divided into two columns. The left column contains fields for the user's personal information: Title (Mr.), First Name (James), Middle Name (empty), Last Name (Smith), Maiden Name (empty), Suffix (empty), Nickname (Jim), and Relation (empty). Below these are Date Of Birth, Gender (radio buttons for Male and Female, with Male selected), and Home page. The right column is titled "Spouse/Partner Information:" and contains fields for the spouse's information: Title (Mrs.), First Name (Susan), Middle Name (empty), Last Name (Brown), Maiden Name (empty), Suffix (empty), Nickname (empty), and Relation (empty). Below these are Date Of Birth, Gender (radio buttons for Male and Female, with Female selected), and Home page.

Figure 3. Editing Biographic Information

After he submits his changes, we can review them by clicking on **My Backpack** in both **Student/Parent Addresses** and **Alumni/Development**.

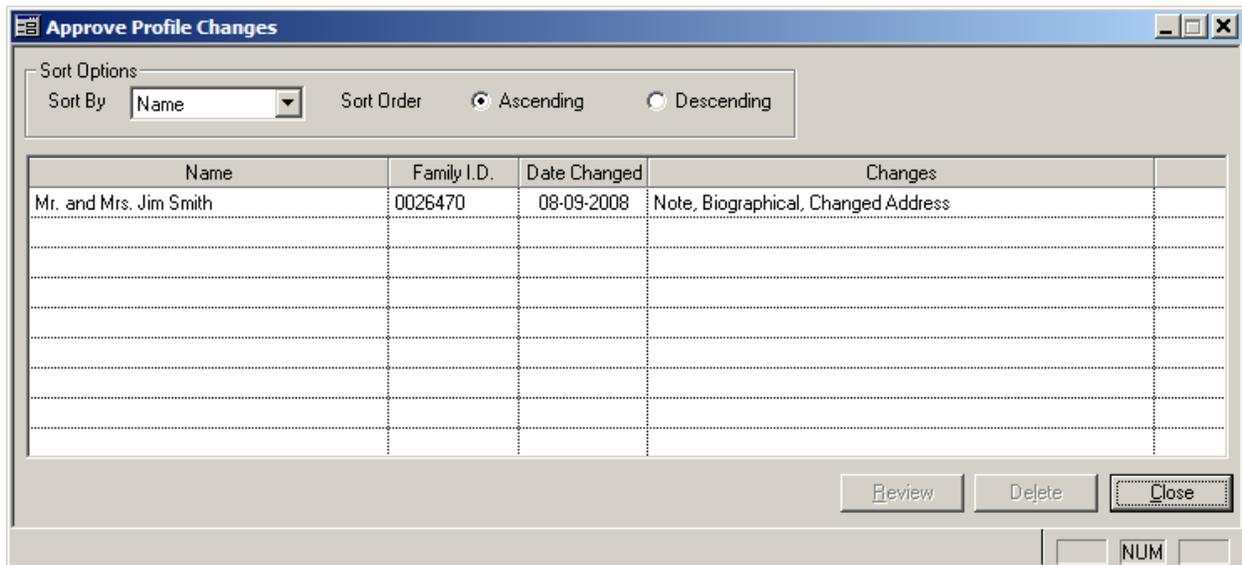


Figure 4. Approving Profile Changes

Changes can still be reviewed by double-clicking the desired row or selecting the row and clicking **Review**.

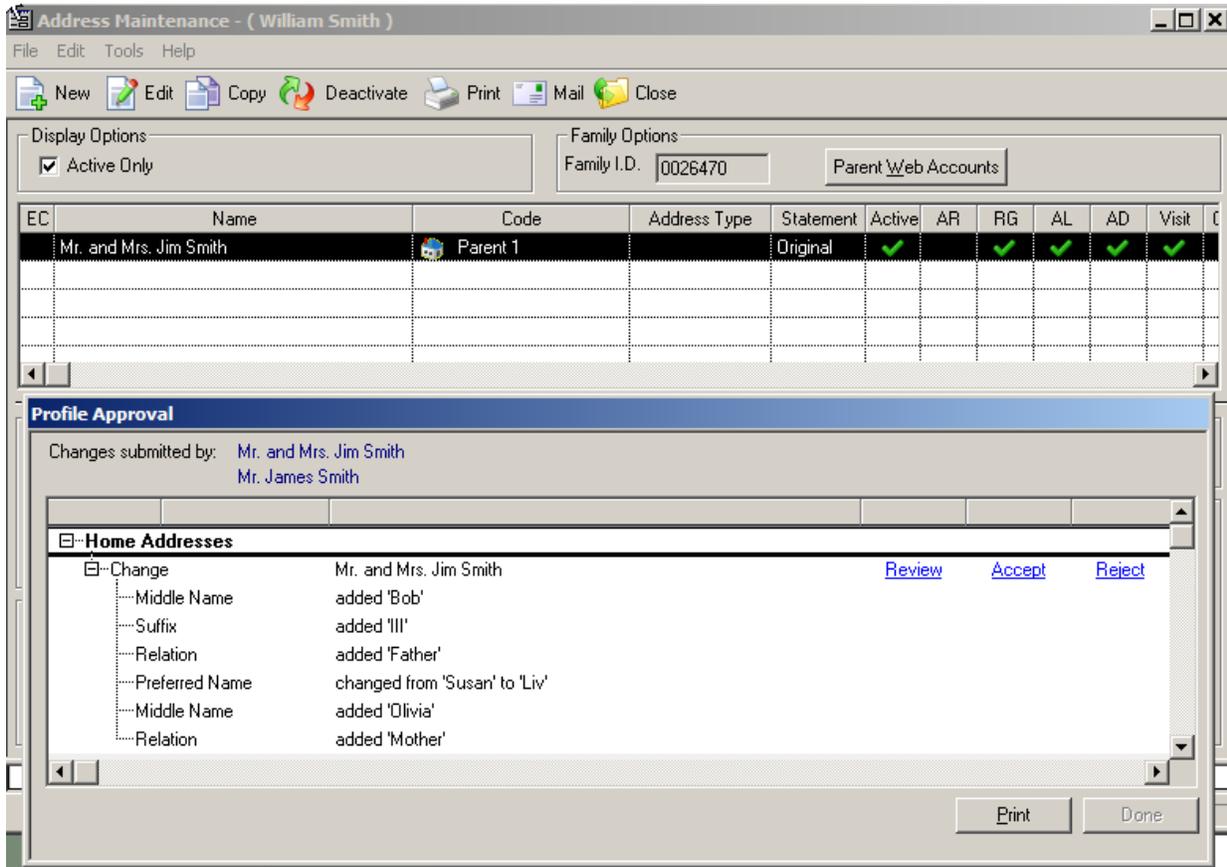


Figure 5. Student/Parent version of the new Profile Approval window

The **Profile Approval** window opens within the **Address Maintenance** screen for this parent in **Student/Parent Addresses** and can be moved around the desktop and resized to fit your needs.

Constituent Maintenance - (Mr. and Mrs. James and Susan Smith)

Prospects | Giv. Summary | Giv. Detail | Track | Events | Media | Custom | Comments | Web ID

Name | Salutations | Address | Info | Attributes | Relation | Activity | Education | Solicitor | Mailings

Constituent

I.D. 23074 Assign

Title Mr.

First James Pref. Jim

Middle

Last Smith Suffix

Maiden Gender M

Spouse

I.D. 23075 Assign

Title Mrs.

First Susan Pref. Susan

Middle

Last Brown Suffix

Maiden Gender F

Profile Approval

Changes submitted by: Mr. James Smith

Mr. James Smith

Biographical

Middle Name	added 'Bob'	Review	Accept	Reject
Suffix	added 'III'	Review	Accept	Reject
Birth Date	added 04-23-1968	Review	Accept	Reject
Homepage	added 'www.senior-systems.com'	Review	Accept	Reject

Note

Note	I wanted to change my spouse's name as she never goes by Susan, even thc	Review	Accept	
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Mrs. Susan Brown

Biographical

Preferred Name	changed from 'Susan' to 'Liv'	Review	Accept	Reject
Middle Name	added 'Olivia'	Review	Accept	Reject
Maiden Name	added 'Simpson'	Review	Accept	Reject
Birth Date	added 05-18-1969	Review	Accept	Reject

Print Done

Printable version

Figure 6. Alumni/Development version of new Profile Approval window.

Within the **Constituent Maintenance** screen in Alumni/Development, you can now view the current address/constituent record before approving or rejecting changes. Each change is listed in a separate row, categorized by the type of change and can be expanded or collapsed using the box beside the text

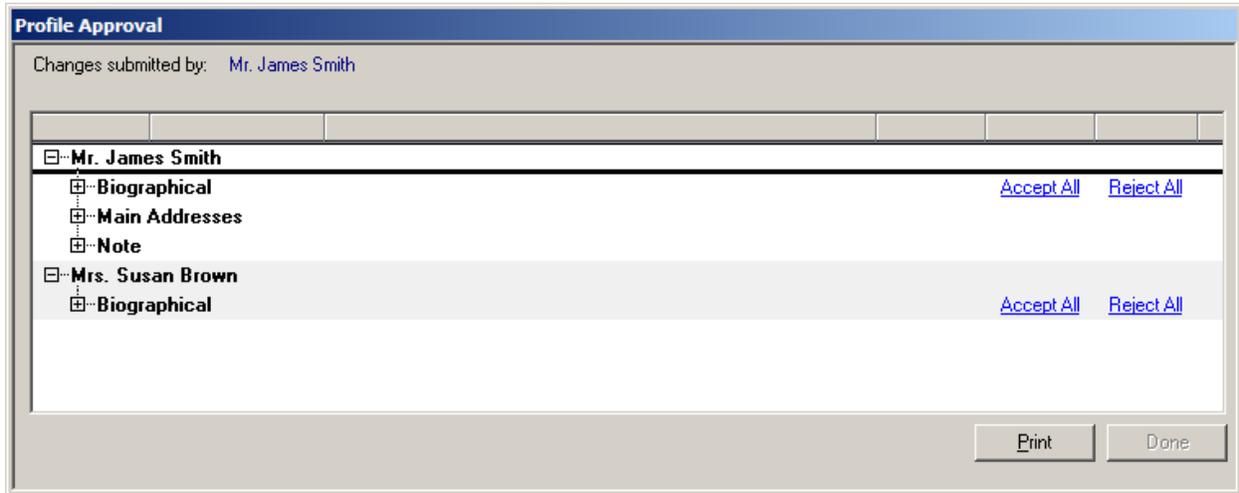


Figure 7. Profile Approval window with rows collapsed

In this example, the **Alumni/Development** user is the first to notice the profile change. Clicking the [Review](#) link next to the Middle Name that was added brings up the **Name** tab for Mr. James Smith.

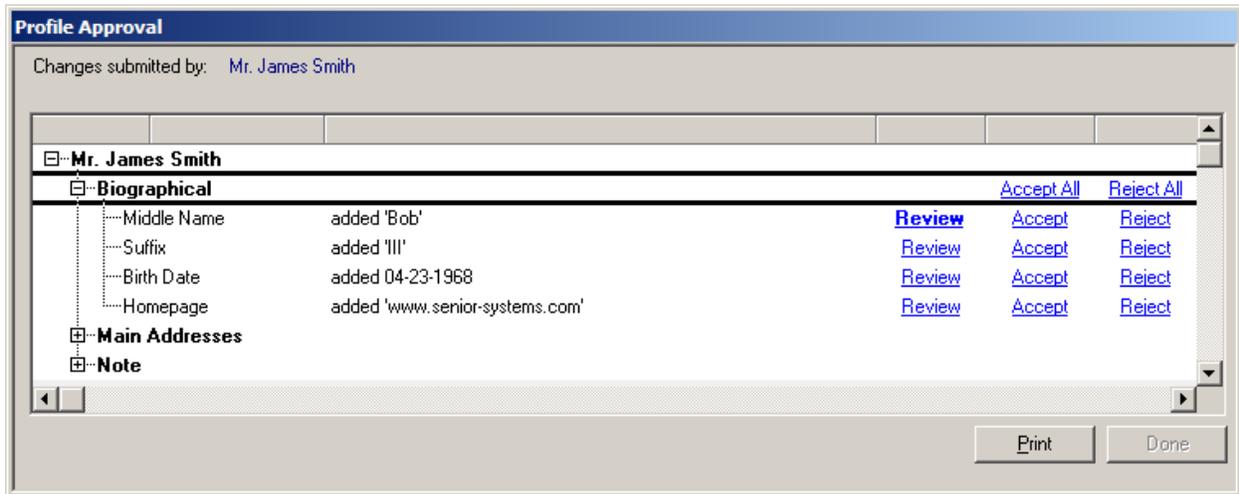


Figure 8. Profile Approval window

Here, we can view the original values for each field on the tab. Clicking on the [Accept](#) link will overwrite any fields that have changed with the values Jim submitted.

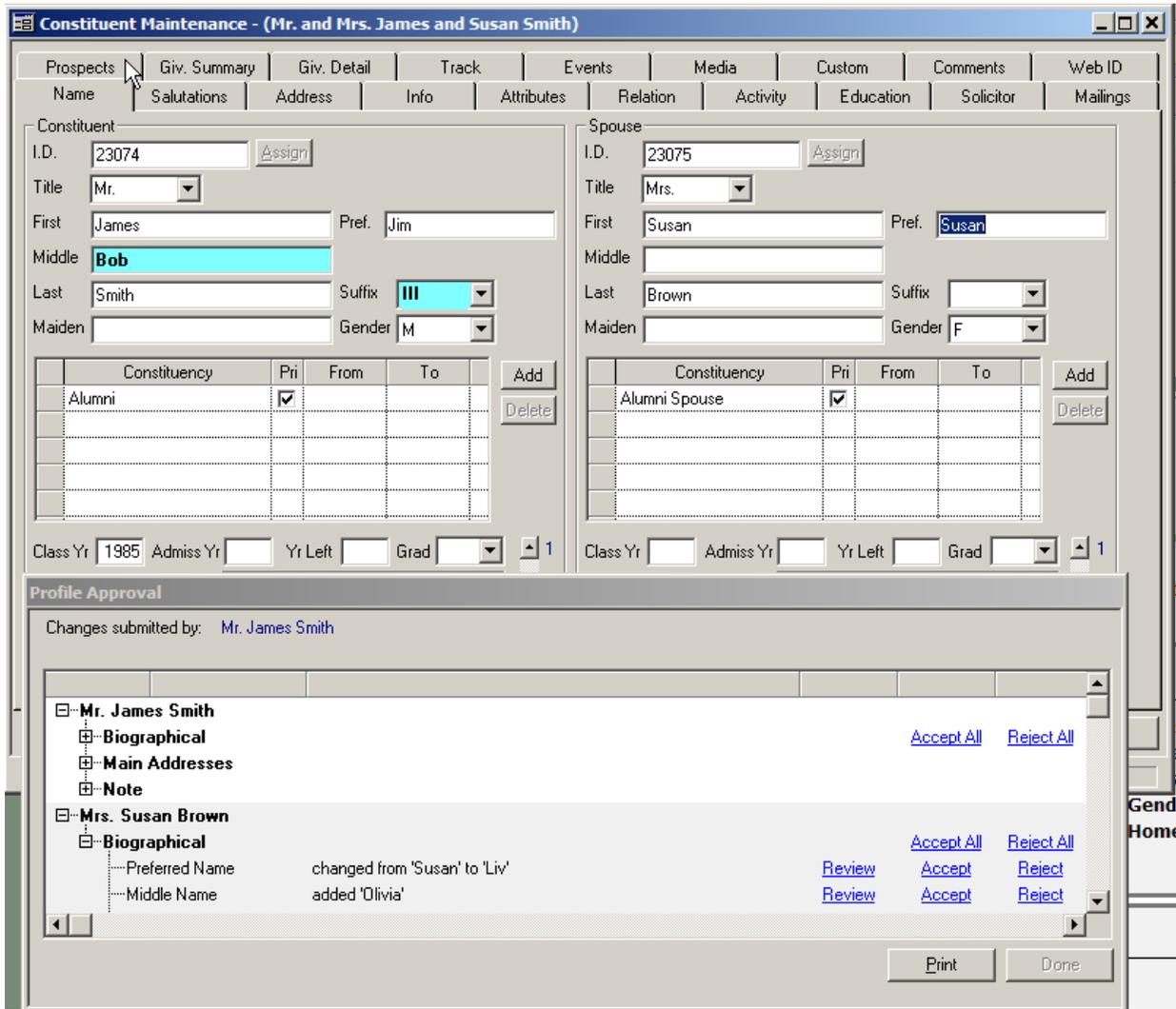


Figure 9. Profile Approval window

So far we are comfortable with all of the changes, but when we click [Accept](#) on the Notes row, we see that Jim is unclear how to change his spouse's first name. This is because he is not allowed to do so.

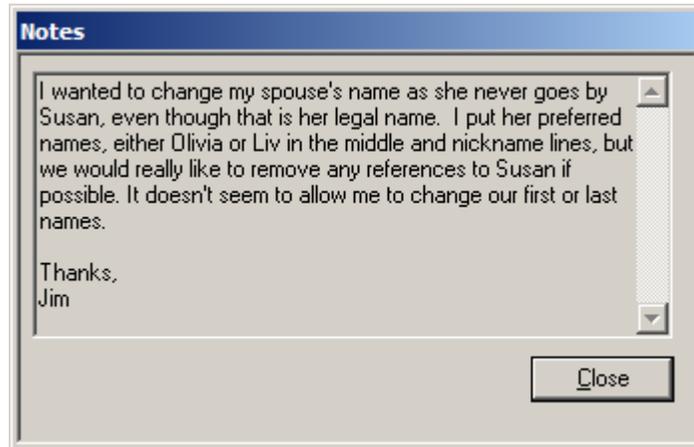


Figure 10. Notes window

We can change Susan's name by navigating back to the **Name** tab and overwriting the changes we had just accepted moments ago.

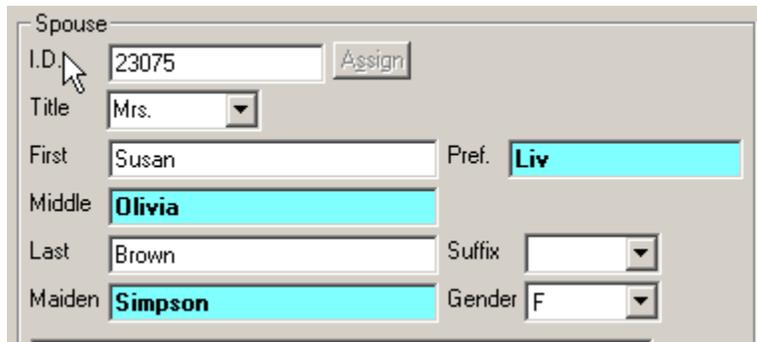


Figure 11. Changing the Name tab

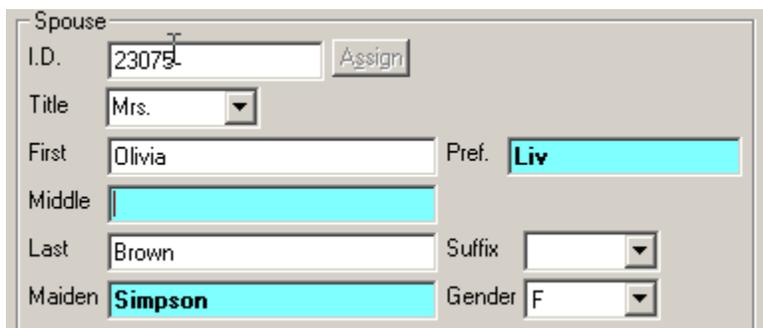


Figure 12. Overwriting Changes in the Name tab

As for the address changes, by comparing the original address to what Jim submitted, it seems he's just trying to fill in some blanks and correct a few mistakes we had. We can click [Accept](#) to approve his changes.

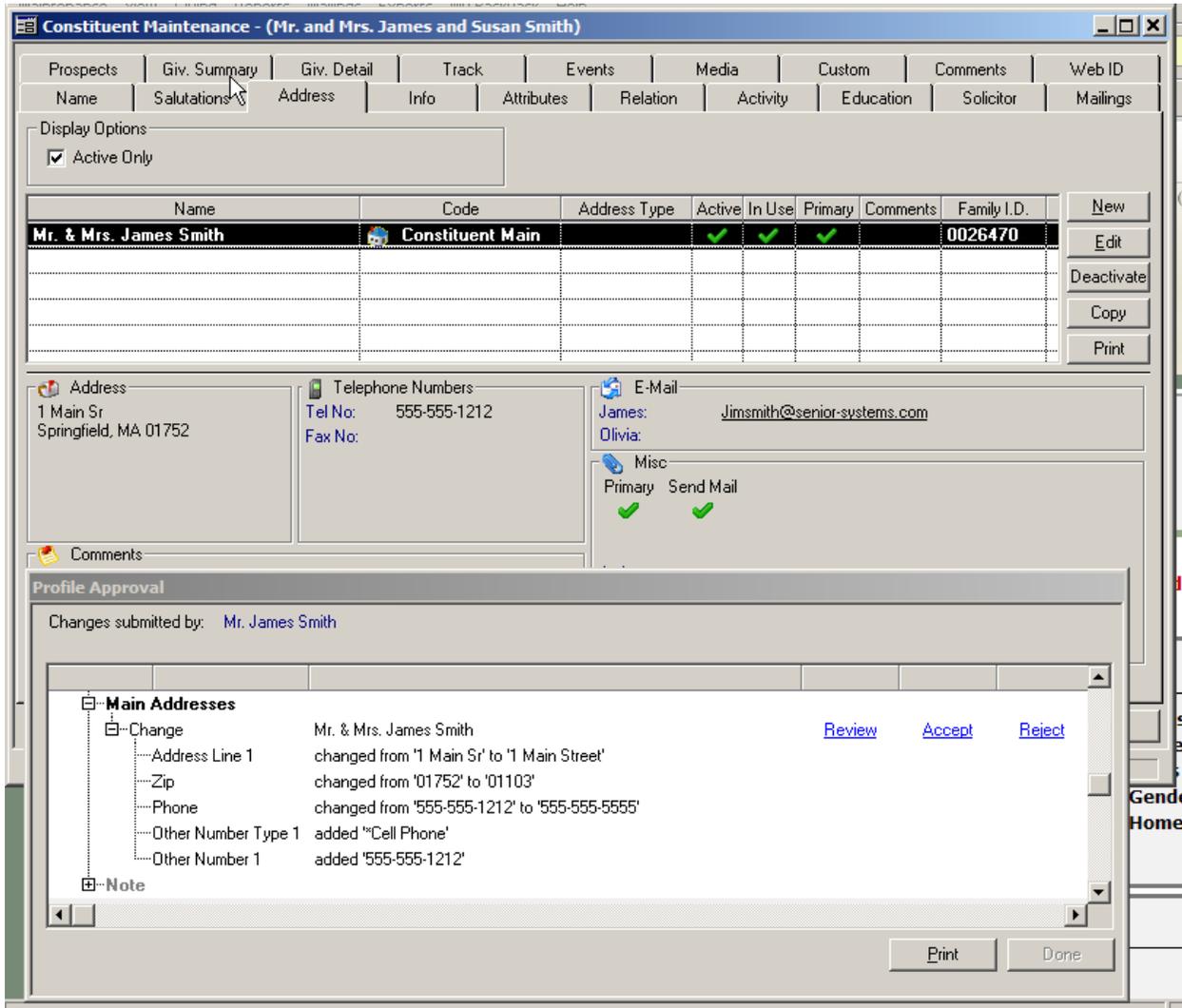


Figure 13. Profile Approval window

Development is now complete with its review of Jim's changes. By clicking on **Done**, the profile window is dismissed.

Address Maintenance - (Mr. & Mrs. James Smith)

Address | General | Attributes | Comments

Mailing Address

Name: Mr. & Mrs. James B. Smith, III [DNP]

Line 1: 1 Main Street [DNP]

Line 2: [DNP]

Line 3: [DNP]

City/St/Zip: Springfield MA 01103 [DNP]

Country: [DNP] Region: [DNP]

Sort Key: SMITH, JAMES B.

Reporting City/Town: Springfield

Telephone Numbers

Tel. No.: 555-555-5555 [DNP]

Fax No.: [DNP]

*Cell Phone: 555-555-1212 [DNP]

E-Mails

James: Jsmith@senior-systems.com [DNP]
 Send Household E-Mails Swap E-Mails

Olivia: [DNP]
 Send Household E-Mails

Do Not Publish this Address record Do Not Display in My BackPack

Constituent Main Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files. [OK] [Cancel] [Delete]

Figure 14. Address Maintenance window

Click **OK** to save the constituent record.

However, if Jim were to log in now, he would see that the approval is still not complete. **Student/Parent** still needs to give its approval for certain fields.

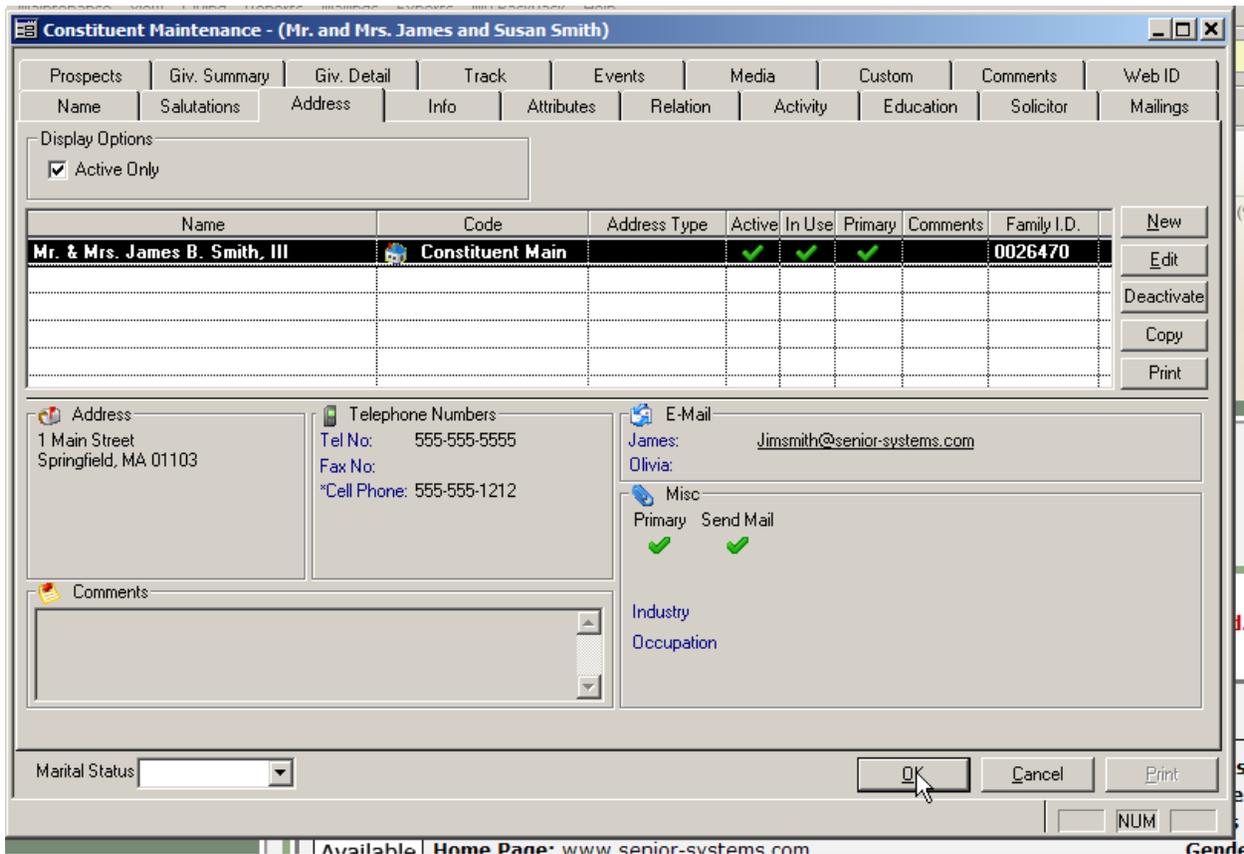


Figure 15. Constituent Maintenance window



Figure 16. What Jim sees when he logs in while the approval is still in process

When **Student/Parent** reviews the profile change, we don't see any address change information because Jim's address is linked between the applications and approval of an address change by one department applies to all departments. However, since other biographical data is stored separately, both **Alumni/Development** and **Student/Parent Addresses** must approve these changes (and can make different decisions about the data if they so choose).

In **Student/Parent Addresses**, Jim's **Birthdate** or **Homepage** is not visible, but we do see **Middle Name**, **Preferred Name**, **Suffix**, and **Relation** to the Student. We also see the note he submitted.

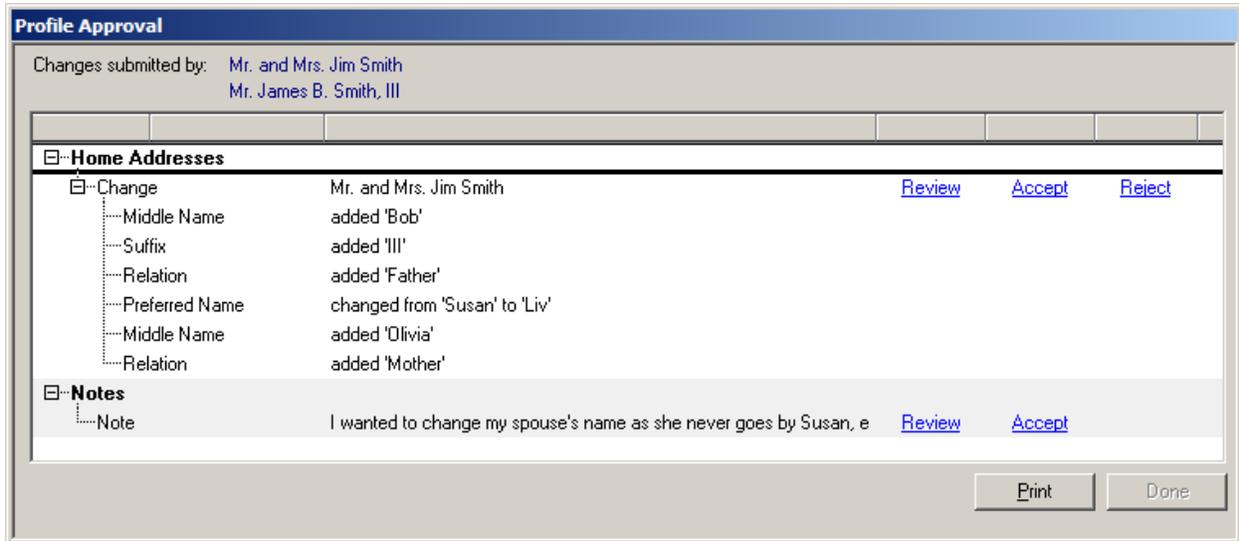


Figure 17. Profile Approval window

By clicking [Accept](#), we see what has been changed by Jim, not by **Alumni/Development**.

Address Maintenance - (Mr. and Mrs. Jim Smith)

Parent/Guardian | Address | General | Comments

Father / Name 1

Title: Mr.

First: James

Middle: Bob

Last: Smith

Suffix: III

Preferred: Jim

Relation: Father

SSN:

Mother / Name 2

Title: Mrs.

First: Susan

Middle: Olivia

Last: Brown

Suffix:

Preferred: Liv

Relation: Mother

SSN:

Web I.D. JSMITH01

Full Name: Mr. and Mrs. Jim Smith, III

Custody

Parent 1

OK Cancel Delete

Figure 18. Address Maintenance window

Names have been changed, yet the address fields appear to be unchanged because **Alumni/Development** has already approved the address changes and there is no opportunity for these fields to be different between applications since the address record is shared.

Address Maintenance - (Mr. and Mrs. Jim Smith)

Parent/Guardian | **Address** | General | Comments

Mailing Address

Name: Mr. and Mrs. Jim Smith, III [DNP]

Line 1: 1 Main Street [DNP]

Line 2: [DNP]

Line 3: [DNP]

City/St/Zip: Springfield MA 01103 [DNP]

Country: [DNP] Region: [DNP]

Sort Key: SMITH, JAMES BOB

Reporting City/Town: Springfield

Telephone Numbers

Tel. No.: 555-555-5555 [DNP]

Fax No.: [DNP]

*Cell Phone: 555-555-1212 [DNP]

E-Mails

Father / Name 1 E-Mail: Jimsmith@senior-systems.com [DNP]

Send Household E-Mails [Swap E-Mails]

Mother / Name 2 E-Mail: [DNP]

Send Household E-Mails

Do Not Publish this Address record Do Not Display in My Backpack Paper Statement Electronic Statement

Parent 1: Mr. and Mrs. Jim Smith, III Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files. [OK] [Cancel] [Delete]

We should remember, because of Jim's note, to change the name information for Liv, but if school policy dictates that the **Registrar** and **Business Offices** require the parents' legal names to be on file, we can keep the record as it stands and just make sure to adjust Jim and Liv's salutations appropriately. (Remember that **Student/Parent Addresses** and **Alumni/Development** store separate name and salutation fields even when the parent record is linked to a constituent record via the address record.)

Finish the approval by clicking **Done**.

Profile Approval

Changes submitted by: Mr. and Mrs. Jim Smith
Mr. James B. Smith, III

[-] Home Addresses

[-] Notes

[Print] [Done]

Figure 19. Profile Approval window

This profile approval is now complete and Jim can begin to make more changes if he likes. If Jim and Liv were to move, we would follow the same steps as before, unless we wanted to archive a copy of their old address. Generally this is an **Alumni/Development** practice, not typical for schools only using **Student/Parent** applications.

Before approving an address change, to keep a copy of the original address, we can simply click **Copy** on the **Address** tab. We are still going to change the original address, but by making a copy, we not only preserve the linking of the original address to the **Student/Parent** address, but also have an **Alumni/Development**-only copy in case we ever lose touch with the family after graduation.

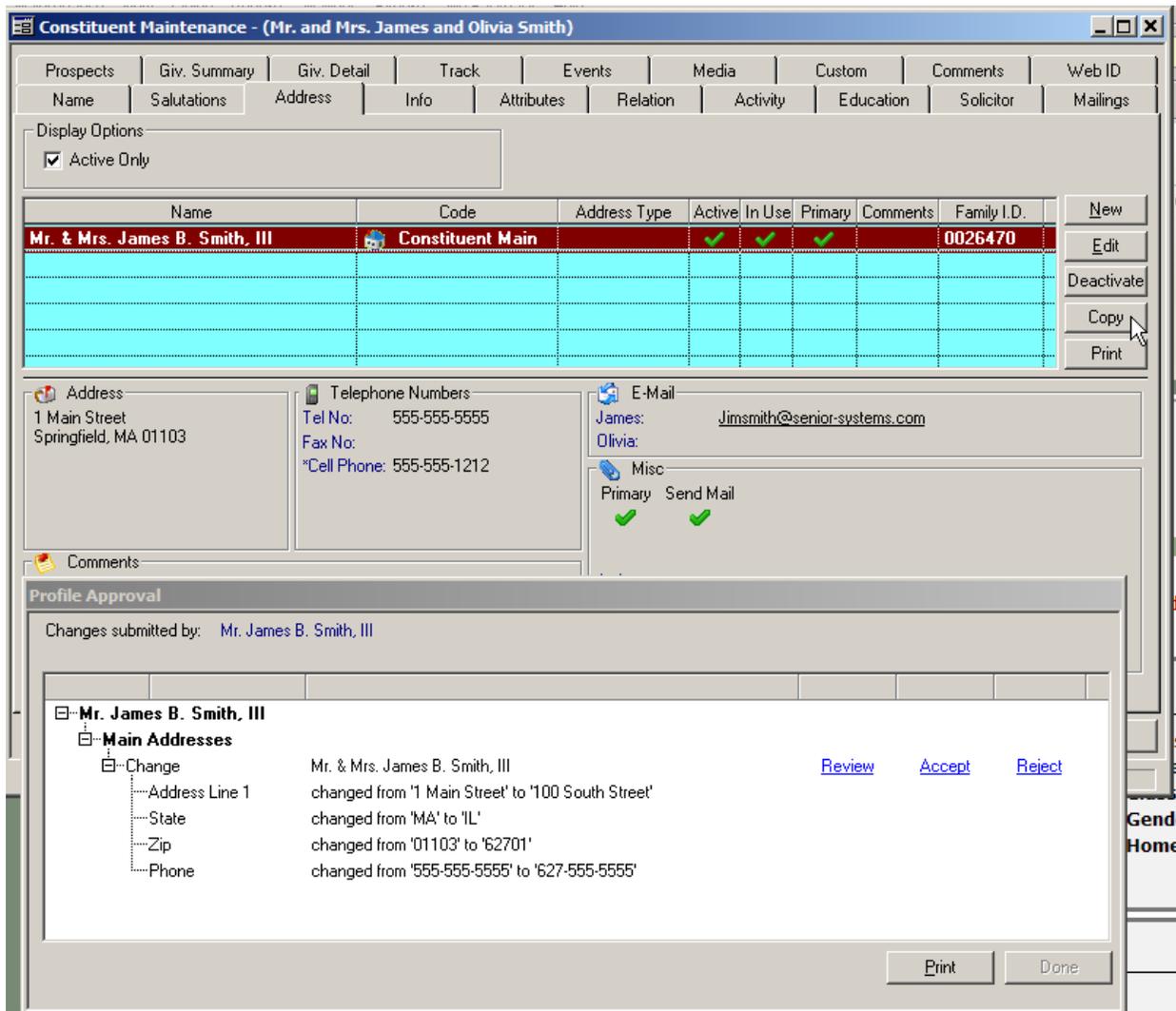


Figure 20. Profile Approval window

After clicking **Copy**, we are prompted to pick an **Address Code** to use when storing the new copy. "Other" is generally used for this purpose, though "Constituent Main" is valid.

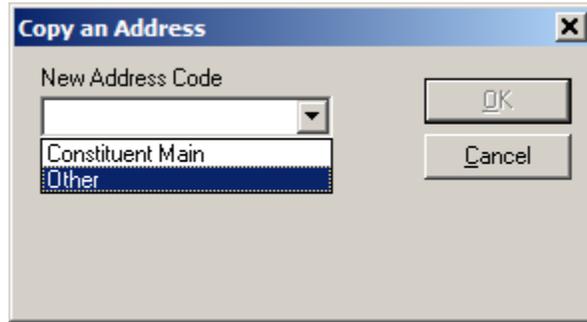


Figure 21. Copy an Address window

After selecting the **Address Code** and clicking **OK**, the copy is created, and we can then approve the changes to the original address just as we did in the earlier example.

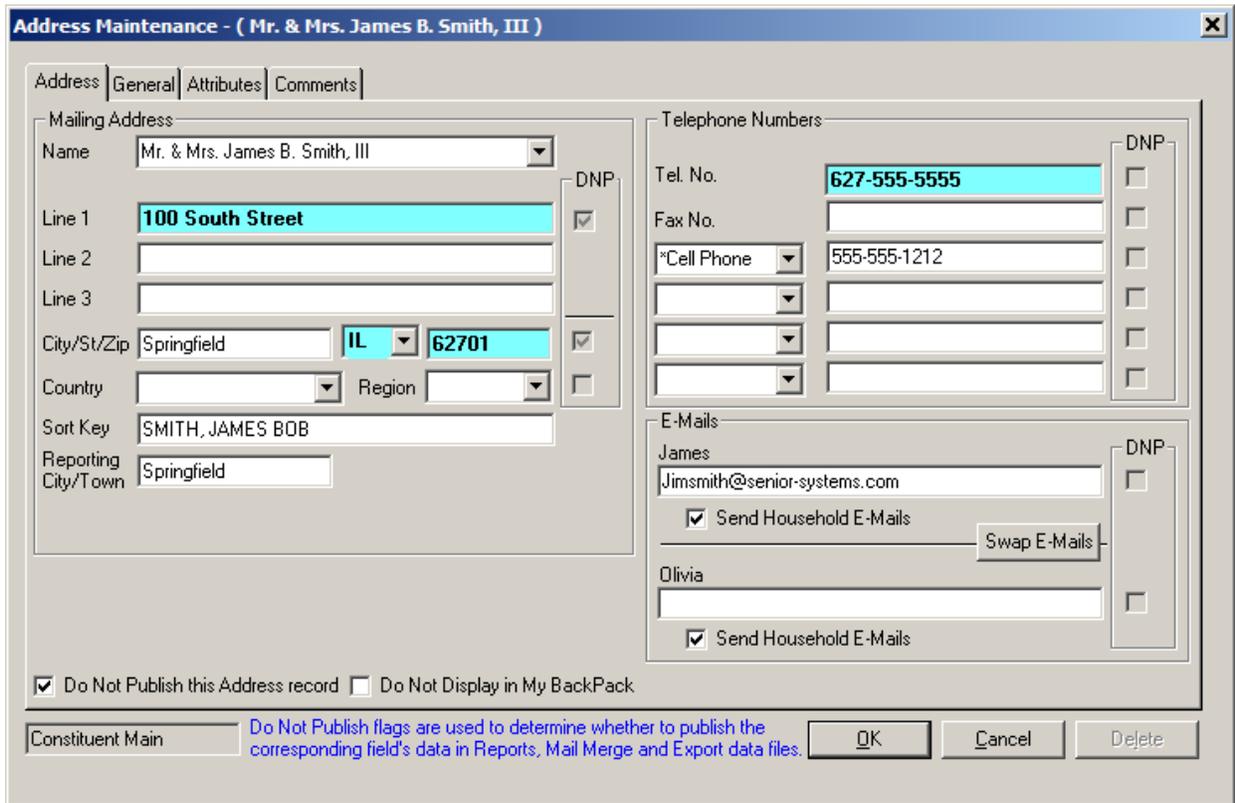


Figure 22. Address Maintenance window

It's important to remember that since address changes only need to be approved by one department, if one department wants to keep a copy of the old address, they need to make this copy before the other office approves the change. One easy way of making sure this happens is to make sure you send the biography change notifications to the right user.

In the **System Administration** application, under **My Backpack > Preferences**, you can set the email address to use when notifying users of profile changes. You can notify multiple users, or you can notify one user, who then can pass on the email after he/she has processed it. Any user with access to **Approve Profile Changes** will be able to check if there are any recent profile changes, but alerting one user via email may help maintain a processing order.

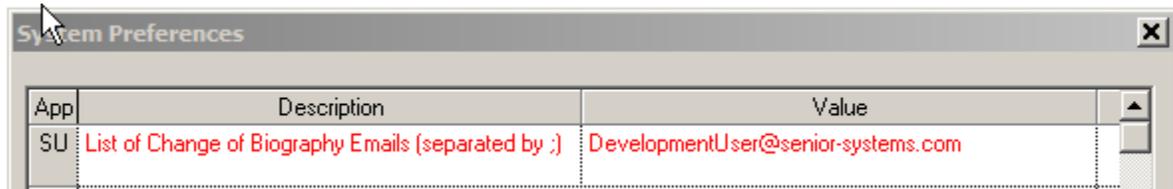


Figure 23. System Administration > My Backpack > Preferences

In our final example, Jim has added his work address, and this time, it's **Student/Parent** that notices the change first. The process for approving the addition of an address is similar to the previous steps.

To approve the addition of the address, we click [Accept](#), which will launch the **Address Code** selection screen. We select the proper address code, and search the constituent addresses by clicking **Search Constituents** to see if **Alumni/Development** already has a work address on record.

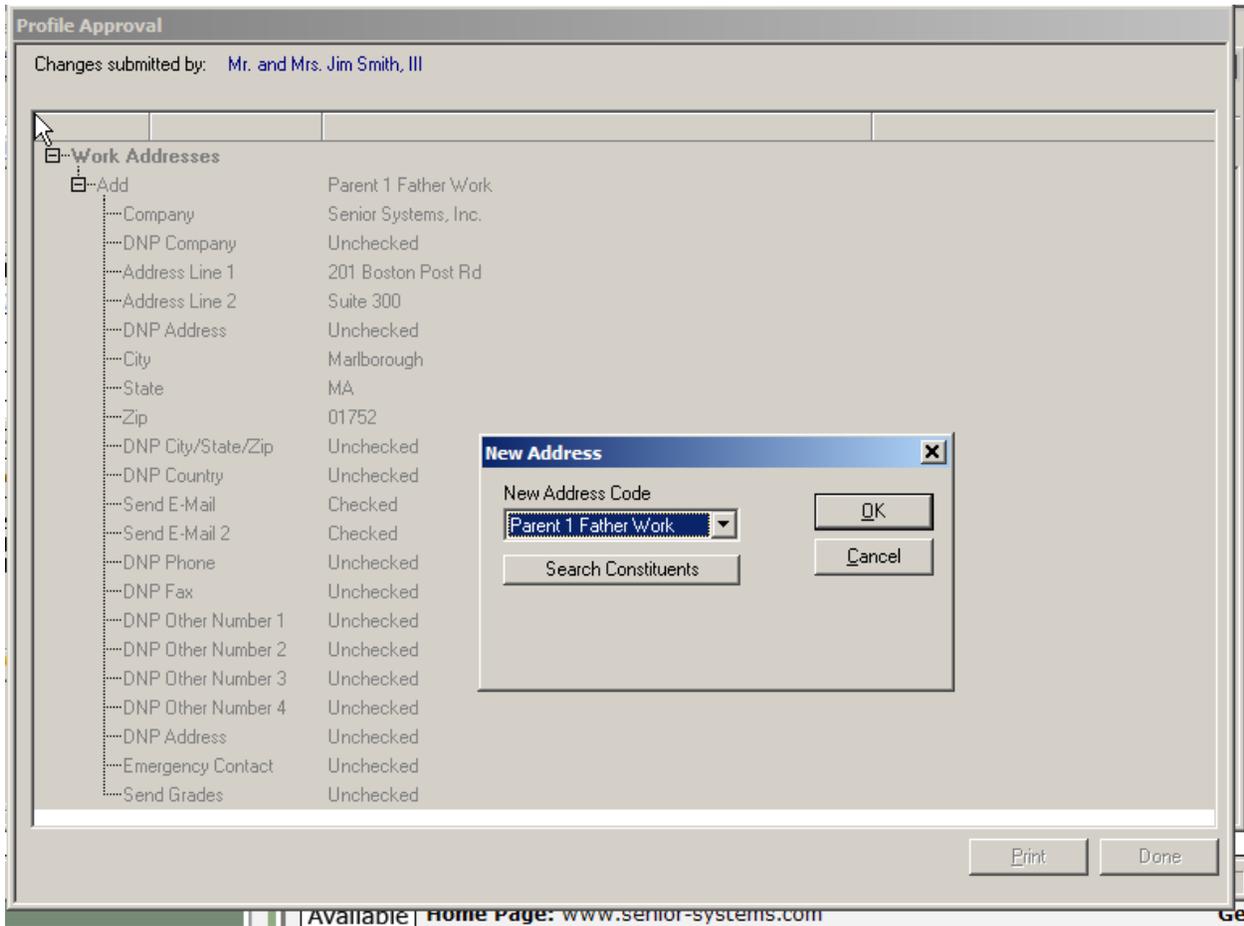


Figure 24. New Address window

If they do, we'll have to decide if the change Jim has made is superficial and we can safely approve the change, or if we should let the **Alumni/Development** office process this profile change first, so they can decide what to do with the address they already have.

Address Maintenance - (New)

Address | General | Occupation | Comments

Mailing Address

Co. Name: Senior Systems [DNP]

Line 1: 201 Boston Post Rd W [DNP]

Line 2: Suite 201 [DNP]

Line 3: [DNP]

City/St/Zip: Marlborough MA [DNP]

Country: [DNP] Region: [DNP]

Addressee: Mr. James Bob Smith, III

Reporting City/Town: Marlborough

Parent Company: [DNP]

Bill Codes: A/R [DNP] Loans [DNP]

Send Grades

Send Grades (Summer School)

Attend Visit

Do Not Publish this Address record

Do Not Display in My BackPack

Telephone Numbers

Tel. No. [DNP]

Fax No. [DNP]

E-Mails

Work E-Mail 1 [DNP]

Send Household E-Mails

Work E-Mail 2 [DNP]

Send Household E-Mails

Parent 1 Father Work

Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files.

OK Cancel Delete

Figure 25. Address Maintenance window

Since this is a work address, once we decide to add it, we need to associate a valid company name. Most likely, we will have to add this company to the company list. Clicking on Search from the **Address Maintenance** window opens **Company Maintenance**, where we can click **New** to add Jim's company to the company list. It's not necessary to add the company's address to the main company record, however the program will prompt you with the following message:

Address Maintenance

? The address and/or telephone numbers for the Company selected are different than those previously entered for this address. Would you like to replace the address information with the selected Company information?

Yes No Cancel

Figure 26. Address Maintenance window

The answer to this question is generally **No**, since clicking **Yes** overwrites Jim's address information with that of the company, which is oftentimes blank.

The approval of Jim's work address is now complete for the **Student/Parent** application. **Alumni/Development** must now simply decide if it wants to approve the addition of this address. Clicking [Accept](#) on the **Profile Approval** window will launch the **Address Maintenance** screen for editing, but if there are no further changes for **Alumni/Development** to make at this time, they can click **OK**, and the new work address will be added and linked to the address previously approved by the **Student/Parent** application.

There are no system requirements for which office approves profile changes first. Many biography changes pertain only to one application, and cannot be approved by a department that does not have the ability to see these changes. Name changes, as well as additions of new addresses, need approval by both an **Alumni/Development** user as well as a **Student/Parent** user. Edits to addresses only need approval by an **Alumni/Development** user or a **Student/Parent** user. This new interface should provide enough flexibility to accommodate various policy decisions regarding the approval of online profile changes while upholding the existing functionality available within the client-based applications.

The screenshot shows the 'Address Maintenance' window with the following fields and options:

- Address Maintenance - ()** (Window Title)
- Address** | General | Occupation | Attributes | Comments (Tabs)
- Mailing Address**
 - Co. Name: Senior Systems, Inc. (DNP checkbox)
 - Line 1: 201 Boston Post Rd (DNP checkbox)
 - Line 2: Suite 300 (DNP checkbox)
 - Line 3: (DNP checkbox)
 - City/St/Zip: Marlborough MA 01752 (DNP checkbox)
 - Country: (DNP checkbox)
 - Region: (DNP checkbox)
 - Addressee: Mr. James Bob Smith, III
 - Reporting City/Town: Marlborough
 - Parent Company: (DNP checkbox)
- Telephone Numbers**
 - Tel. No. (DNP checkbox)
 - Fax No. (DNP checkbox)
 - (DNP checkbox)
 - (DNP checkbox)
 - (DNP checkbox)
 - (DNP checkbox)
- E-Mails**
 - Work E-Mail 1 (DNP checkbox)
 - Send Household E-Mails (Swap E-Mails button)
 - Work E-Mail 2 (DNP checkbox)
 - Send Household E-Mails
- Do Not Publish this Address record Do Not Display in My BackPack
- Constituent Work: Do Not Publish flags are used to determine whether to publish the corresponding field's data in Reports, Mail Merge and Export data files.
- Buttons: OK, Cancel, Delete

Figure 27. Address Maintenance window