SeniorSystems

All Applications
Release Bulletin
## November 2009

In this bulletin...

About Release 91_5

The latest release includes two new add-on modules, Dashboard and Online Summer School Registration, which are now available for Senior Systems applications, as well as a set of minor enhancements affecting System Administration, Registrar, Summer School, Admissions, Online Admissions, Accounts Receivable, Fixed Assets, and Alumni/Development. There are also new supplemental user guides available for Daily Gradebook and Online Statements.

As always, if you have questions about these new and enhanced features, be sure to contact Senior Systems Product Support for assistance!

New Products: Dashboard, Online Summer School Registration

- **Dashboard** – is a graphical information display that is customized for each user, and is visible across all Senior Systems applications or from any web browser. You can create customized charts and graphs, summaries and/or detailed data grids that are dynamically maintained with up-to-the-minute information from your Senior Systems database.
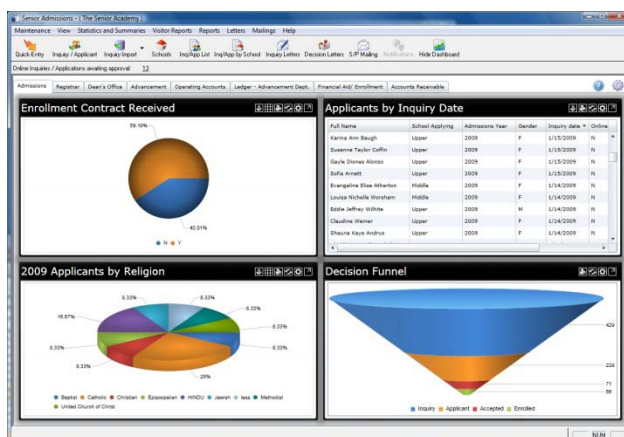
- **Online Summer School Registration** – is an add-on module for My BackPack and the Summer School application that allows parents to register students for summer school courses or programs, submit payments, and check schedules online. There is an automated process that streamlines the entry of this information into the Summer School application.

User guides for these new products are now available in your system Reference Guides folder, and you may also notice minor changes in some applications that are related to this new functionality. If you would like a demonstration or more information about these new products, please contact your Senior Systems sales representative.

New User Guide: Daily Gradebook

There is a new supplemental User Guide available for the Daily Gradebook add-on module for My BackPack. This PDF is available in your system Reference Guides folder, and via the Help menu in the Registrar application.

Enhancement: System Administration - LDAP Student Web ID Assignment

Schools that want to use LDAP authentication and who have student user names that are the same as the recipient portion of the students' email addresses (part before the @ in the email address) can now automatically assign student web user IDs to students based on their email addresses (without domain), and use the LDAP authentication for the password assignment. These new options are available as part of the **Auto Assign Web User > Students** wizard in System Administration.

> **Note**: If you are a hosted school, there are additional considerations for using LDAP authentication. Please contact Senior Systems Product Support for more information if you would like to implement LDAP authentication.

To utilize these new options for student web user assignment:

Follow your normal procedure for automatically assigning web users to students through step 2 of the wizard. (You may want to include a condition in the student selection query to exclude students with a blank email address.) Step 3 allows you to set the format (structure) for the web user ID:
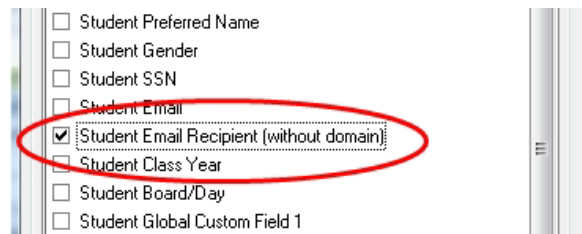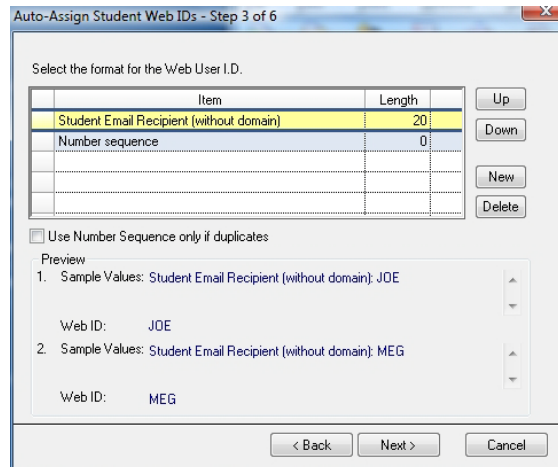

Delete any existing components of the web ID (except for the Number Sequence, which cannot be deleted) by clicking on the row to select it and clicking **Delete**. Then click **New** to add a new component, and select '**Student Email Recipient (without domain)**'.

Set the Length for the Number Sequence to **0** and for the Student Email Recipient to **20** (the maximum value) by editing the field contents.

Then click **Next**. In step 4 of the wizard, select '**Allow LDAP Login**' for the password assignment.

Click **Next** and continue with the wizard to complete the auto assign process.

Enhancement: System Administration - Auto-Assign Groups To Web Users

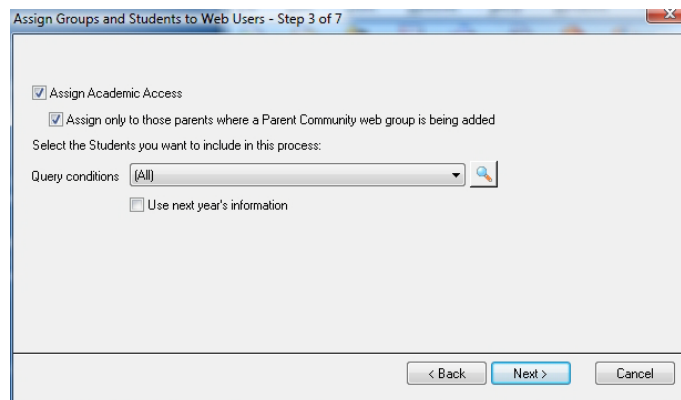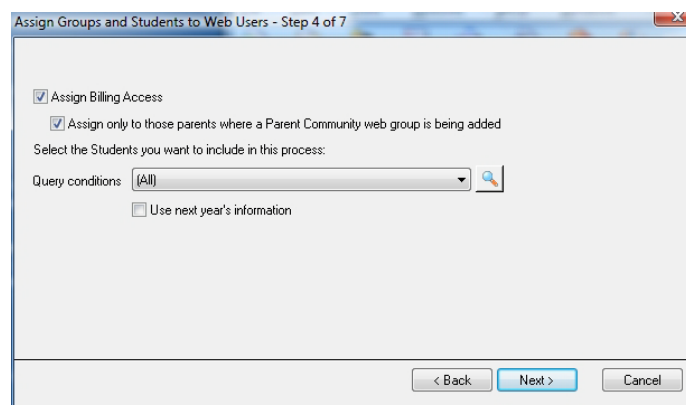As part of the **Assign Groups to Web Users for Parents (Current)** wizard, there are two new steps that allow you to automatically assign academic access and/or billing access to parents at the same time. You can limit the assignment to only those parents where a Parent Community web group is being added at this time, and you can optionally use a query to limit the students that are included in the process. You can also choose to use next year's information.

To utilize these new options for assigning academic and/or billing access to parents:

Follow your normal procedure for automatically assigning groups to parent web users through step 2 of the wizard. Step 3 allows you to assign academic access:

Check or un-check the boxes to select your options, and select a query if applicable. Then click **Next**. Step 4 allows you to assign billing access:

Check or un-check the boxes to select your options, and select a query if applicable. Then click **Next** and continue with the wizard to complete the group assignment process.

Enhancement: Registrar/Summer School/Accounts Receivable - Profile Change Approval and Notifications

It is now possible for users to approve profile changes (made through My BackPack) directly in the Registrar, Summer School, and Accounts Receivable applications, without having to log into the Student/Parent application. The '**Approve Parent Profile Changes**' function has been added to the **My BackPack menu** in Registrar, Summer School, and Accounts Receivable. Also, the '**Approve Student Profile Changes**' function has been added to the My BackPack menu in Accounts Receivable, to enable processing of changes to student data made through the Online Summer School Registration process. Note however that changes to fields that are specific to one application may still only be approved from within that application (e.g. Registrar/Summer School users cannot approve changes to Bill Code; Accounts Receivable users cannot approve changes to Send Grades). The actual approval process works in the same way that it did previously; simply select the appropriate option from the My BackPack menu in Registrar, Summer School, or Accounts Receivable to get started.

Related Security Keys:

New security keys have been added for approval of profile changes as shown below:

- Registrar > My BackPack > Approve Parent Changes
- Summer School > My BackPack > Approve Parent Changes
- Accounts Receivable > My BackPack > Approve New Students
- Accounts Receivable > My BackPack > Approve Existing Student Changes
- Accounts Receivable > My BackPack > Approve Parent Changes

In addition to these new security keys, users will also need the '**Edit Linked Addresses**' security key (under **Student/Parent Addresses**) to approve changes in Registrar, Summer School, or Accounts Receivable.

See the System Administration Reference Guide or speak to Senior Systems Product Support if you need assistance with changing security settings.

Notifications:

There are also new options for Notifications, so you can choose to receive notifications for student and/or parent profile changes in the same way that you receive notifications for withdrawals or other online activity such as admissions or summer school registration. As with withdrawal notifications, you can choose the schools or divisions for which you want to receive notifications, as well as the application(s) in which you want to receive them. You can also select whether or not to see a pop-up window at login time when there are any notifications that you have not yet acknowledged or acted upon.

**To request notifications for either or both of these types of profile changes**:

Click the ![Notifications] **Notifications** button in the application screen header. Then click the ![Options] **Options** button on the Notifications and Reminders screen and select the appropriate tab (**Student Profile Changes** or **Address Profile Changes**).
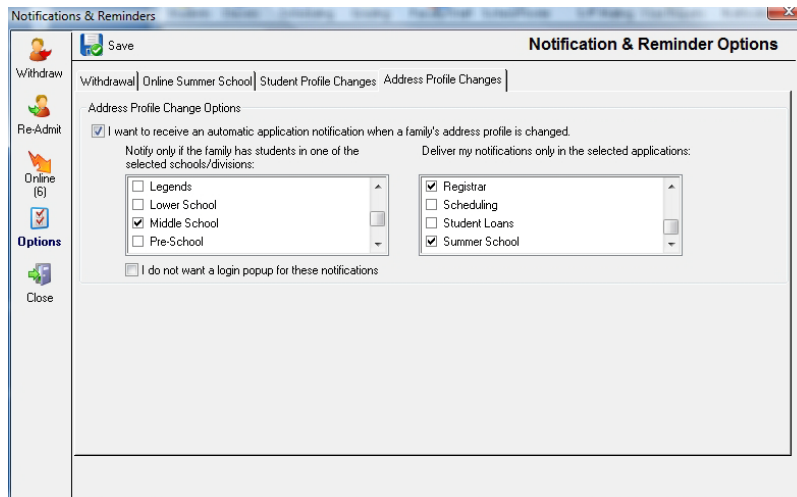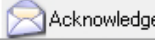

Check the boxes to make your choices, click the ![Save] **Save** button and then the ![Close] **Close** button.

> **Note**: You will receive notifications only for profile changes made from this point forward; you will not receive notifications for any previous profile changes.

To review profile change notifications:

Review from your pop-up window (if selected), or at any time by clicking on the ![Notifications] **Notifications** button in the header of the appropriate application screen. If the profile change notifications are not currently displayed, click the ![Online] **Online** button, and then select the desired tab (**Student Profile Changes** or **Address Profile Changes**).

To acknowledge the notifications and clear the screen, click the ![Acknowledge] **Acknowledge** button. To acknowledge the notifications and proceed to the approval process, click the ![Action] **Action** button. Otherwise, click the ![Close] **Close** button to close the screen and leave the notifications for review at a future time.

Enhancement: Online Admissions - Close Online Inquiries, Account Creation Confirmations

Two new features have been added to Online Admissions:

- There is now an **Online Admissions Account Creation Confirmation email** that is automatically sent to new users as soon as they have created an online user account (before they have submitted an online application). The contents of this email are determined by a template that you can customize in a similar manner to the Online Admissions Application Confirmation email, with merge fields available for the user's First Name, Last Name, User ID, and a link to the login page. This template is accessed and maintained from the Confirmation tab of Email Template Maintenance in the Admin Community of My BackPack.

- You now have the ability to **"open" and "close" the Online Inquiries function** if your school has a limited season for accepting online inquiries. There is a checkbox at the top of the Online Inquiries tab for Online Admissions Setup in the Admin Community of My BackPack to '**Allow Online Inquiries**'. If this box is not checked, users will receive a message that "Online Inquiries are not being accepted at this time." when they attempt to access the online inquiry form. If you are closing online inquiries for the season, you will also want to make sure that you remove the link on your school website for the online inquiry form.

Enhancement: Admissions - New Merge Fields

The Student Email, Parent Email 1, and Parent Email 2 are now available as merge fields for the admissions follow-up letters (Inquiry, Followup, Interest, Decision, and Checklist).

Enhancement: Fixed Assets – Walk Forward Report Detail Option

The Walk Forward Report now has a detail option that breaks down asset valuation and depreciation amounts by individual asset within each asset class. At the time of printing, you can select either the '**Detail**' or '**Summary**' option.
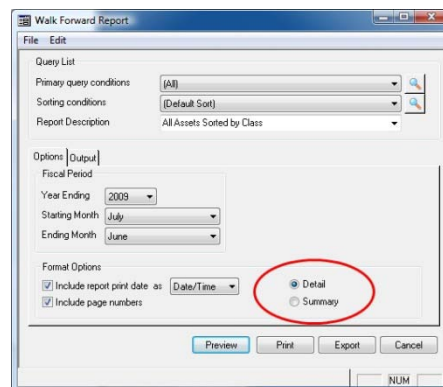
Walk Forward Report

The Senior Academy   Page: 2
EIN#   81-1172791
Year Ended 06/30/2009

Form 990 Page 2 Part II Line 42
Form 990 Page 3 Part IV Line 57a and 57b

Fixed Assets	07/01/2008	Additions	Retirements	06/30/2009	Depreciation	07/01/2008	Additions	Retirements	06/30/2009
FURNITURE, FIXTURES, EQUIPMENT									
DTV SOUND SYSTE	1,374.50	0.00	0.00	1,374.50	DTV SOUND SYSTE	0.00	0.00	0.00	0.00
LECTURN	1,845.39	0.00	(1,845.39)	0.00	LECTURN	369.08	0.00	(369.08)	0.00
LECTURN	1,845.39	0.00	(1,845.39)	0.00	LECTURN	0.00	1,845.39	(1,845.39)	0.00
LIBRARY BOOKCA	3,293.97	0.00	0.00	3,293.97	LIBRARY BOOKCA	0.00	0.00	0.00	0.00
SLATE PC CORE SO	1,955.85	0.00	0.00	1,955.85	SLATE PC CORE SO	0.00	0.00	0.00	0.00
SOCCER GOALS	2,590.00	0.00	0.00	2,590.00	SOCCER GOALS	0.00	0.00	0.00	0.00
SOFTBALL PITCHI	1,500.00	0.00	0.00	1,500.00	SOFTBALL PITCHI	0.00	0.00	0.00	0.00
SONY CAMCORDE	2,729.24	0.00	0.00	2,729.24	SONY CAMCORDE	0.00	0.00	0.00	0.00
T3/E3 CISCO NETW	5,300.00	0.00	0.00	5,300.00	T3/E3 CISCO NETW	0.00	0.00	0.00	0.00
TRAINING TABLE	0.00	3,610.00	0.00	3,610.00	TRAINING TABLE	0.00	0.00	0.00	0.00
TRAINING TABLE	0.00	3,610.00	0.00	3,610.00	TRAINING TABLE	0.00	0.00	0.00	0.00
Total for FURNITURE, FIXTURES, EQUIPMENT: 11	22,434.34	7,220.00	(3,690.78)	25,963.56			369.08	1,845.39	(2,214.47)	0.00
Total	468,297.31	7,220.00	(3,690.78)	471,826.53	Total	369.08	1,845.39	(2,214.47)	0.00

Enhancement: Alumni/Development - Prospect Management Rating and Stage Codes

Code Maintenance for the Rating Codes and Prospect Stage Codes used in Prospect Management (Prospect tab, Rating and Stage sub-tabs, in Constituent Maintenance) has been enhanced for clarity and sorting purposes:

- The **Rating Codes are now maintained based on each unique Rating Name**, making it easier to select the correct code from the dropdown on the Rating Entry screen in Constituent Maintenance, since the dropdown will now only show Rating Codes that apply to the Rating Name selected. In addition, the Sort Order for the Rating Codes now applies within the Rating Name, rather than to the entire list.
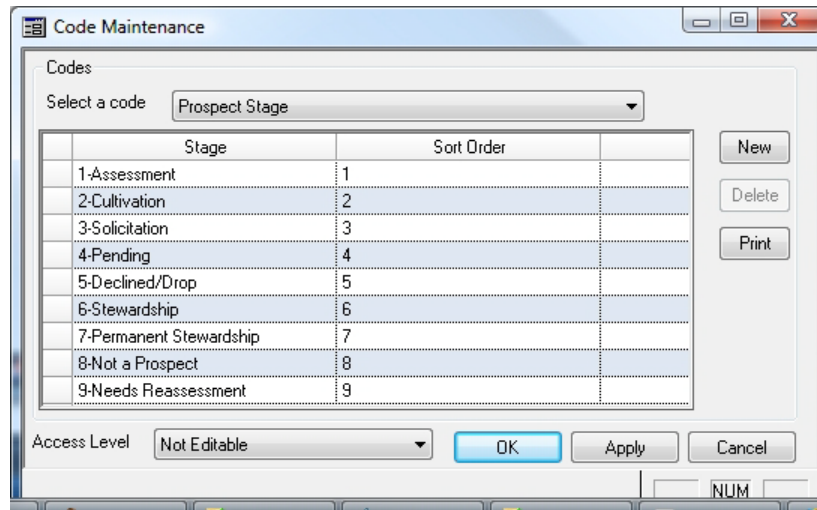
  As part of the database update process, your current Rating Codes were organized by Rating Name in Code Maintenance, and an initial Sort Order was applied based on the current sorting within the table. You will want to use Code Maintenance to review the results of this processing, and possibly edit the data as necessary. If your school has embedded a natural sorting mechanism into the Rating Code (such as preceding each value with a number or letter), you can also clean up these values during the review process.

  Note: If, during the review process, you make any changes to the Rating Code values, you will also need to make corresponding changes to any queries that reference those values, to ensure that the queries to continue to work properly.

- The **Prospect Stage Codes now have a separate Sort Order field** that can be used to properly sort and sequence the stages. This Sort Order field is also available for query and export operations so you can easily sort the output to determine the highest stage that a prospect has reached, for example. If your school has embedded a natural sorting mechanism into the Stage Name (such as preceding each value with a number or letter), you may want to use Code Maintenance to clean up these values. In any

case, you should at least review the Prospect Stage codes in Code Maintenance to make sure the assigned Sort Order is correct.

Note: If, during the review process, you make any changes to the Prospect Stage Code values, you will also need to make corresponding changes to any queries that reference those values, to ensure that the queries to continue to work properly.