

All Applications Release Bulletin

January 2010

In this bulletin...

Online Enrollment: HTML Forms for Contracts.....	2
System Administration: MBP Online User Accounts.....	11

About Release 91_6

This release includes changes to the Online Enrollment module to allow the use of HTML templates instead of PDF documents for enrollment contracts, thereby making contract templates easier to design and maintain, and averting PDF-related compatibility issues for My BackPack parent users. There are also some minor changes to System Administration to better manage online web user accounts for Online Admissions and Online Summer School Registration.

Online Enrollment: HTML Forms for Contracts

You can now use a special HTML contract editor to create your online enrollment contract templates, instead of the Microsoft Word templates that were previously used to create PDF enrollment contracts. There are two primary benefits associated with this new method:

1. The template creation and maintenance process is more user-friendly, allowing you to select elements such as buttons, checkboxes, and dropdowns from a menu, rather than entering complex formulas to achieve the desired results.
2. The resulting contracts are produced as HTML forms, averting Adobe compatibility problems experienced by some parent users (primarily Mac users) with the PDF forms.

These notes highlight some of the information you will need to convert your current contract templates to the new format and/or create new contract templates. If you have any questions or problems, please contact your Senior Systems Project Coordinator for assistance.

Things to Know About HTML Contract Templates

You will still need to create separate templates for each major variation of enrollment contract that you produce. As with the previous method, you can also create additional documents to be submitted by parents (e.g. medical or housing forms, etc.). All of these templates are stored on your My Backpack server.

Contracts and additional documents can be extensively customized using merge fields for database information. You can format text as desired, and you can include features such as images or graphics, checkboxes, radio buttons, dropdowns, text boxes for user input, date fields (with a calendar tool), and fields that are calculated based on formulas (e.g. 'Tuition Amount - Scholarship Grant' or 'Tuition Amount/2'). You must also be sure to include:

- a 'Submit' button (you can rename this if desired)
- at least one 'Back To Enrollment Home' button (you can rename this if desired)
- a position for validation messages (error messages for required fields)

These three items are automatically included on the blank form when you create a new contract template; you can then move or re-configure them if necessary.

Note: The first time you use the contract editor, you will need to specify the path to your My Backpack server (in the format 'https://servername/SeniorApps' - replace "servername" with your MBP server name). If you ever need to change this value, just select **File > My Backpack URL** from the main menu in the contract editor, enter or change the URL, and click **SAVE**.

Creating and Maintaining HTML Contract Templates

You will create and maintain HTML contract templates using a word-processor style interface that has special menu options to insert and configure particular features, as described below. You can use the **Preview** tab at the bottom of the screen as needed to get an idea of the resulting output, however merge fields will not be filled with data in this editor (if you want to view a sample contract with actual data, you will need to use the 'View' option in the publishing process for one or more student records from the database; you can then decline to actually publish the sample contract).

Be sure to save each template with a unique and easy-to-identify name (it is a good idea to save your template frequently during the creation or editing process!). When you select to save, the system displays a dialog box that allows you to enter a new Template Name or to choose from a list of existing templates. You can also specify the Template Type ('Contract' or 'Additional Document') at this time. After creating your first template, you can speed the creation of similar versions by saving the file multiple times with different names to quickly create copies which you can then edit and re-save.

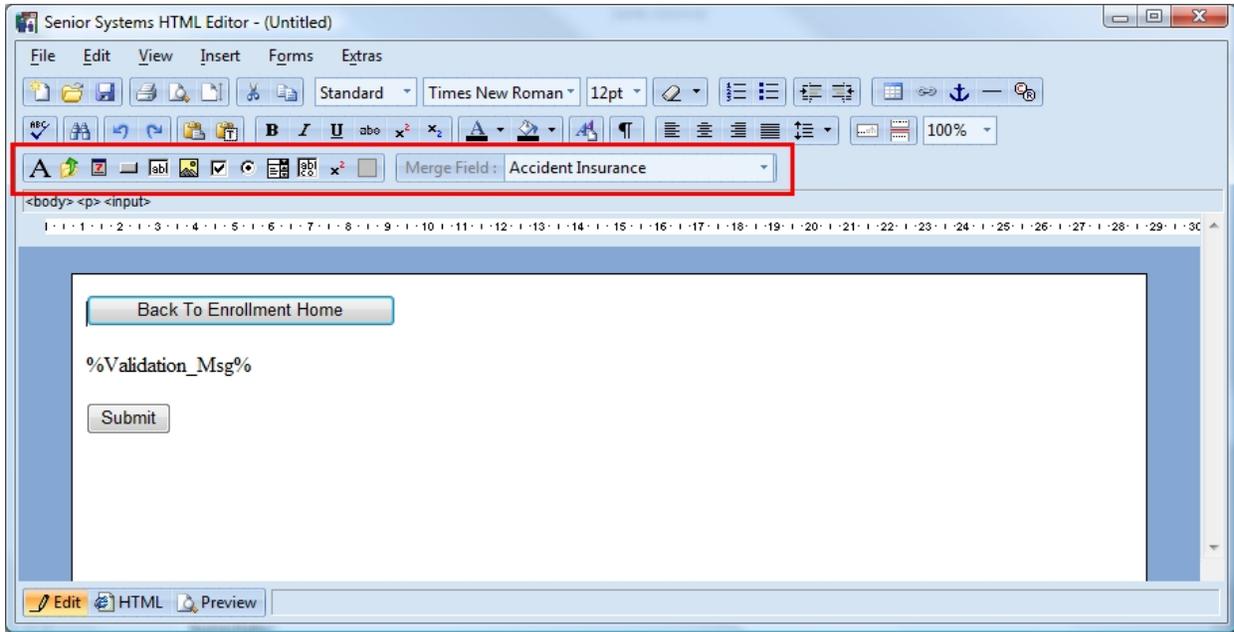
Note that the template file is used at the time of publishing AND each time a user views or opens the contract, so if you make changes to a template and then re-save it AFTER contracts have been published, you will receive a warning message that those already published contracts will immediately reflect the new change the next time they are viewed or opened. If that is not your intention, change the template name before saving.

Using The Contract Editor

You can access the contract editor by selecting **Enrollment Contracts > Contract Editor** from the main menu in the Enrollment application. The contract editor begins with a new file in 'Edit' mode, but you can then open an existing template if desired. You can switch between 'Edit' and 'Preview' mode as desired using the tabs at the bottom of the screen.

Tip: If you want to copy text from your previous Microsoft Word templates, you should first copy the text to the Notepad, and then copy from the Notepad to the HTML form editor. This intermediate step will remove any extraneous hidden characters that can cause problems with the HTML forms. Do not attempt to copy the formulas from those templates.

The sample screen on the next page shows the contract editor interface in 'Edit' mode, as it appears when you first create a new contract template. The highlighted toolbar contains options for the special HTML form features and merge fields, and the following table describes how to insert and/or configure each HTML form feature.



Note: Keep the following points in mind when creating and editing contract or additional document templates:

- In some cases you may need to double-click to position your cursor correctly in the document area of the screen.
- Use options such as centering of text with care--HTML formatting may change based on the size of a user's browser window and other factors, and the results may not be what you intend.
- Page breaks may be entered by positioning the cursor and clicking the  icon, however they only apply to PDF versions of the contract or document that are viewed AFTER it has been submitted, and do not affect the screens that parents use when completing and submitting the contract or document.

Feature	Description	How To Use
Text Box (Label) 	Inserts a box into which you can type or place text for a label (not editable by parents)	<ul style="list-style-type: none"> • Position cursor and click . • Double-click inside box to edit text. • Label (box) can be repositioned or deleted as a unit. • Use "handles" to re-size box. • To insert a merge field, place the merge field elsewhere on the document, then copy and paste it into box (then delete original if necessary).

Feature	Description	How To Use
Back To Enrollment Home Button 	Inserts a button that returns parents to the Online Enrollment Home Page in My BackPack	<ul style="list-style-type: none"> • To insert a new button, position cursor and click . • To re-configure existing button, click on button to select it, then right-click and select Input Properties. You can change button text by editing the contents of the Value field (do NOT change the Name or the Type) and you can format button and text appearance using options on the Style tab. Click OK when finished. • Use "handles" to re-size button.
Date Field (With Calendar) 	Inserts a field for date input, along with a calendar tool to allow parents to select rather than type the date; date is returned with enrollment data	<ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name. • Click 'Required' checkbox if field is required. • Enter Default Value if desired. • Click OK. • Use "handles" to re-size box. • To re-configure existing field, click on box to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished. • You can remove calendar tool icon if desired. • Note: Disregard anchor icon that may appear after editing or saving (will not appear to parents).
Submit Button 	Inserts a button that submits the contract or additional document for approval; after submission, parents can no longer make changes	<ul style="list-style-type: none"> • To insert a new button, position cursor and click . • To re-configure existing button, click on button to select it, then right-click and select Input Properties. You can change button text by editing the contents of the Value field (do NOT change the Name or the Type) and you can format button and text appearance using options on the Style tab. Click OK when finished. • Use "handles" to re-size button.

Feature	Description	How To Use
Text Entry Box 	Inserts a box into which parents can enter free-from text or edit a default value (see also Text Area); user input is returned with enrollment data	<ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name. • Click 'Required' checkbox if field is required. • Enter Default Value if desired. • Adjust Max Length if desired. • Click OK. • Use "handles" to re-size box. • To re-configure existing field, click on box to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished. • To insert a merge field as a default value, place the merge field elsewhere on the document, then copy and paste it into box or the Default Value field (then delete original if necessary).
Image 	Inserts an image or graphic	<ul style="list-style-type: none"> • Position cursor and click . • Type URL for image (on My BackPack server), OR click UPLOAD, then click BROWSE, locate file on your computer or network and click OPEN, then click UPLOAD to copy file to My BackPack server and insert URL. • Enter Tool Tip and/or Alternative Text and adjust Layout options if desired. • Click OK. • To re-configure existing image, click on image to select it, then right-click and select Image Properties. Make changes as needed. Click OK when finished.
Checkbox 	Inserts a checkbox that parents can click to select (more than one checkbox in a group can be selected); value of 'Y' is returned with enrollment data if box is checked (otherwise blank is returned)	<ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name. • Select 'True' for Default Value if you want the box to default to being checked; otherwise select 'False'. • Click OK. • Type text associated with checkbox into document next to the box. • To re-configure existing box, click on box to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished.

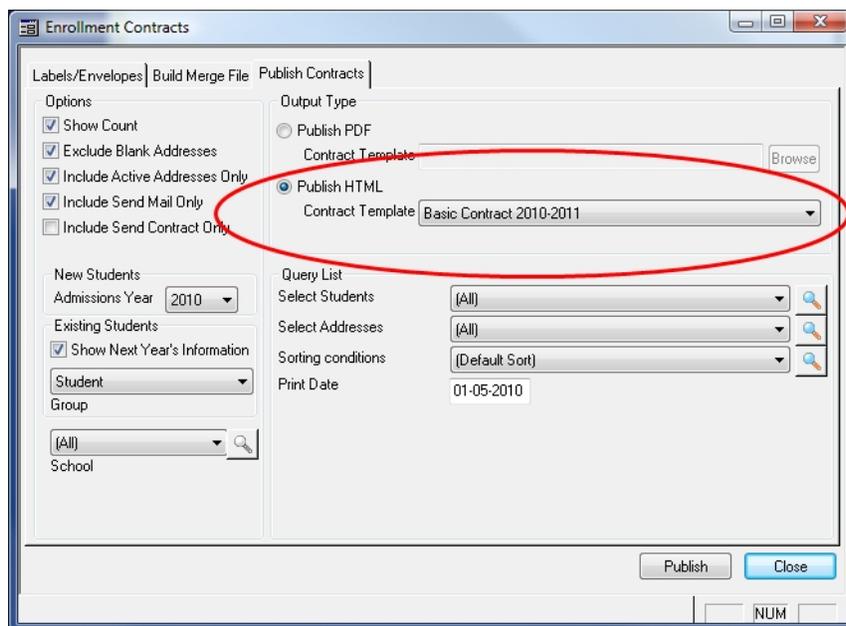
Feature	Description	How To Use
Radio Button 	Inserts a radio button that parents can click to select from a list of mutually exclusive options; value selected is returned with enrollment data	<p>Note: Insert as many radio buttons as needed to include the entire list of options, but <u>be sure to that all buttons in the list use the same Field Name</u> so that they work together properly. Only one button can have a Default Value of 'True' (selected as the default choice from the list).</p> <ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name (must match other buttons in list). • Click 'Required' checkbox if field is required. • Select 'True' for Default Value if you want the button to be the default choice; otherwise select 'False'. • Click OK. • Type text associated with the option into document next to the button. • To re-configure existing button, click on button to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished.
Combo Box (Dropdown) 	Inserts a dropdown list from which parents can choose a single option; value selected is returned with enrollment data	<ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name. • Click 'Required' checkbox if field is required. • Select 'Custom Values' and click ADD to add an option to the list. Then enter the Value to be returned if that option is selected, click in Label field to enter text that will display to parents, and check the Default checkbox if this option is to be the default value. • Click ADD again and repeat as necessary to add more options to the list. • You can click on a list item to select it and then click DELETE to remove it, or click UP or DOWN to change the sequence.

Feature	Description	How To Use
Text Area 	Inserts a multi-line scrolling text box into which parents can enter free-form text; text entered is returned with enrollment data	<ul style="list-style-type: none"> • Position cursor and click . • Select 'Custom' and enter Field Name. • Click 'Required' checkbox if field is required. • Adjust Max Length if desired (maximum number of characters that may be entered), and set Number of Rows and Columns (number of characters long and wide) to set box size on screen. • Click OK. • Use "handles" to re-size box. • To re-configure existing field, click on box to select it, then right-click and select Text Area Properties. Make changes as needed. Click OK when finished. • To re-configure existing list, click on box to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished • You can double-click in box to insert default text. To insert a merge field, place the merge field elsewhere on the document, then copy and paste it into box (then delete original if necessary).
Formula 	Inserts a box with a calculated value as specified by a formula	<ul style="list-style-type: none"> • Position cursor and click . • Click in Formula field to type formula and/or use buttons and merge field dropdown at top of window to insert operators, functions, and/or amounts from the database. Formula status at bottom of window indicates whether formula is valid. • Click OK. • To re-configure existing formula, click on box to select it, then right-click and select Input Properties. Make changes as needed. Click OK when finished.
Div (Floating Text Box) 	Inserts a floating text box that can be positioned as desired on the page (not editable by parents)	<ul style="list-style-type: none"> • Position cursor and click . • Double-click inside box to edit text. • Label (box) can be repositioned or deleted as a unit. • Use "handles" to re-size box. • To insert a merge field, place the merge field elsewhere on the document, then copy and paste it into box (then delete original if necessary).

Feature	Description	How To Use
Merge Fields	Inserts a student or enrollment-related field from the data-base (and also positions error messages for required fields)	<p>To insert a merge field, position cursor and then select from the Merge Field dropdown. Merge fields are surrounded by % symbols. To remove a merge field, just delete the text and the % symbols.</p> <p>Note: Your template <u>must</u> include the special %Validation_Msg% merge field. This allows you to locate where error messages for required fields should appear if parents attempt to submit without completing or selecting all required fields on the form, and does not otherwise display to parents. This will usually be located near the top of the template where it will most easily be visible to parents.</p>

Publishing HTML Contracts

The HTML contract publishing process is very similar to the process for publishing PDF contracts. As before, you must select to publish 'By Student'. On the Publish Contracts tab, there is a new option in the Output Type section of the screen where you will select 'Publish HTML' and then select your Contract Template from the dropdown:



It is always a good idea to view some sample contracts prior to publishing to make sure that your template works correctly. You can do this by proceeding through the publishing process (selecting

only a small group of students if desired) to the screen where you review the list of generated contracts and then select the actual contracts to publish from the list. Without selecting to publish any contracts, you can click the 'View' link for a contract to see the contract page as the parents will see it. And, if you need to make changes or adjustments to the template, simply close the view (but not the list), open the contract editor again, change the template, re-save it, and then click the 'View' link again. Because the contracts are dynamically generated each time they are viewed, any template changes will be reflected without having to close the list and re-publish.

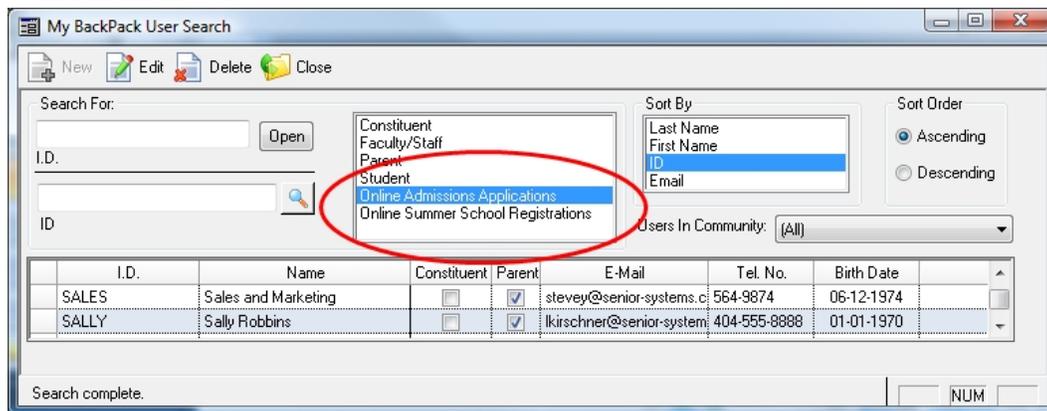
Additional Documents

Templates for additional documents are now automatically added to the Online Documents list on the Documents tab of Online Enrollment Setup when you save them, and do not need to be uploaded separately. Because these documents are now created dynamically when accessed or viewed by parents, they can in some cases be pre-filled by using merge fields in the template.

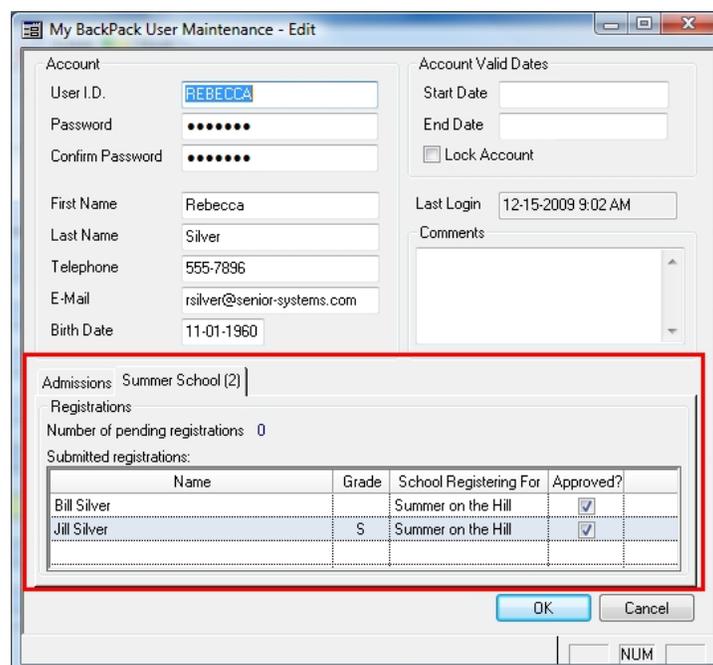
System Administration: MBP Online User Accounts

Because there are now two different types of Online Web Users (applicants for Online Admissions and registrants for Online Summer School Registration), several changes have been made in System Administration to distinguish between those groups of users and to display relevant information regarding both admissions applications and summer school registrations where applicable.

- On the **My Backpack User Search** screen, you can now filter separately for 'Online Admissions Applications' and 'Online Summer School Registrations':



- On the **My Backpack User Maintenance** screen for online web users, there are now two separate tabs at the bottom of the screen for Admissions and Summer School, displaying information about applications and registrations respectively:



- The **Remove Online Web Users** function that deletes all online user accounts now has separate options for Admissions and Summer School, so that you will only remove user accounts for one of the applications at a time (since most schools have different seasons and requirements for maintaining each type of account).

