Release v2.1.1 May 19, 2009

Purpose of the Release

The release is focused primarily on enhancing existing features. All of the enhancements were requested by clients and focused on two areas:

Automatic Notifications – Several new email notification types have been added including Pay in Person Reminder, Pay in Person Past Due Reminder and Membership Renewal Notice, Scheduled Payment Reminder, Saved Credit Card Expiring Notice. As with all other notification types once you set them up they will automatically be sent out as emails and tracked in the Desktop.

Importing Data – Several new import types have been added including people and accounts, volunteer opportunities, fundraising campaigns and forms. As with other data imports these are done in the Desktop using a .CSV file (easily created from Microsoft Excel or other spreadsheet software). The program import feature was also enhanced with the addition of some new columns. Templates of the CSV files are now available in the Desktop for all Import types.

Feature Details

Automatic Notifications

With notifications, if certain conditions or events occur an email is generated and sent out automatically. Notifications are highly customizable and easy to set up. More than one notification of each type can be set up so, for example, you could remind people to pay on the due date and when they are 10, 30 and 60 days past due. Once they are set up they will go out each day without requiring any work from administrators. Generally the added notifications relate to reminding your registrants that they need to make a payment. The request was to save you time and help you collect more money which we've done.

The new notification types will be added to the Communications area of the Desktop. You will be able to set up several new types of notifications, as follows:

Pay In Person Reminder - Organizations who use the Pay In Person feature (allowing participants to pay in cash or by check) will be able to set notifications to remind registrants a set number of days before that payment is due. The specific amount due and the due date will be included as will a link to the My Account page on your website where they can make a payment.

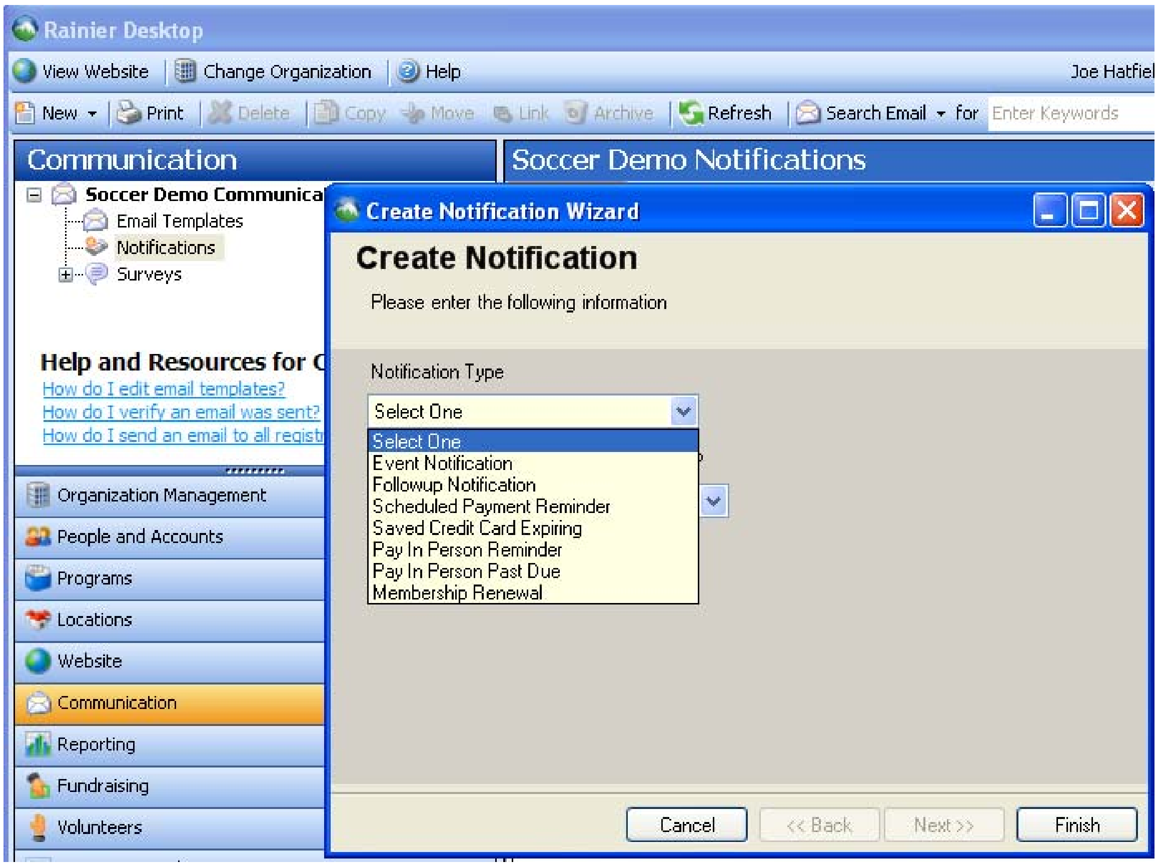
Pay In Person Past Due Reminder - Organizations who utilize the Pay In Person feature (allowing participants to pay in cash or by check) will be able to set notifications to remind registrants a set number of days after the due date, that payment is past due. The specific amount past due and the due date will be included as will a link to the My Account page on your website where they can make a payment.

Membership Renewal Notice – Organizations who utilize the Membership feature will be able to send a notification to members a set number of days before their membership expires, reminding them to renew. The date of the expiration and amount of the renewal will be included as will a link to the My Account page on your website where they can make a payment.

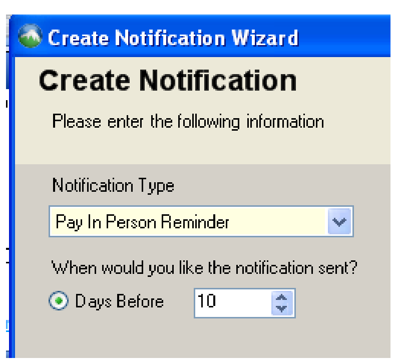
Scheduled Payment Reminder – Organizations who use the reoccurring payment feature (allowing payments to be made over up to 12 months) will be able to set up a notification that will be sent to the registrant a set number of days before the payment is due, reminding them that their credit card will be automatically charged. The specific amount and the scheduled date will be included.

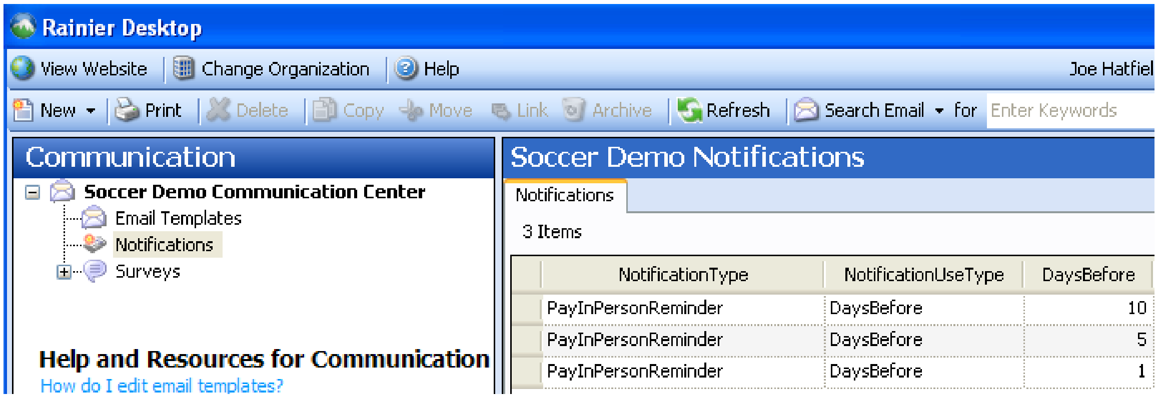
Saved Credit Card Expiring Notice – Organizations who use the reoccurring payment feature (allowing payments to be made over up to 12 months) will be able to set up a notification that will be sent to the registrant a set number of days before their credit card expires. Only participants with payments to be processed after the credit card expires will receive the notice. The expiration date and the upcoming reoccurring payment amount and date will be included as will a link to the My Account page on your website where they can update the expiration date.

Notifications are configured in the Communication tab as shown below. A notification is set up with specific timing rules related to the type of notification begin sent.



Multiple notifications of the same type can be configured to trigger the notifications multiple times. For example, to set up Pay in Person Reminder notifications to be sent 10, 5 and 1 day prior to payment due date (as configured in the Organization Settings -> Pay In Person – Days to pay), three notification's will need to be created:





All notifications function in a similar fashion.

Importing Data

Importing data is very convenient and for large amounts of data is often the only practical way to do it as rekeying it is just too much work. Most software programs allow you to export data in a format that can easily be converted to a CSV file (that stands for Comma Separated Values). Alternatively the Import feature means you can use Microsoft Excel or other spreadsheet programs to create data to be imported.

Almost every client has "legacy" information, often in Excel spreadsheets that they don't want to lose. Most clients have been making use of the Document and Image Repository on the Desktop to safely store their historical data. While this is great for reference they also wanted to make this "actionable". A great example would be, wanting to continue various fundraising campaigns. Accordingly this release adds a number of new Imports to support the most requested scenarios. As with existing Import capabilities, each new type of data import is supported by an easy to use, step by step Wizard.

The new import types have been added to the relevant sections of the desktop. The CSV templates are available from each Import wizard. You will be able to import several new types of data as follows:

Importing People and Accounts - Organizations will be able to use the Import People and Accounts feature to pull in all of their legacy data. This feature will be especially useful for clients who are migrating from other systems and want to get all their current people and accounts into the system quickly and easily.

Importing Volunteer Opportunities - Organizations who utilize the Volunteers feature will be able to use the Import feature to upload the Volunteer Opportunity definitions. For organizations with multiple types of opportunities this makes matching them fast and easy.

Importing Fundraising Campaigns – Organizations who utilize the Fundraising Campaigns feature will be able to use the Import feature to upload the Fundraising definitions.

Importing Forms – Organizations with multiple websites will be able to use the Import Forms feature to save time and effort. We also plan to provide standard template forms on the training website that can be shared.

Program Import Enhancement –Organizations who utilize the Programs feature will appreciate the added capability to import the Volunteer Opportunities, Sponsorships and additional Prices associated with a Program.

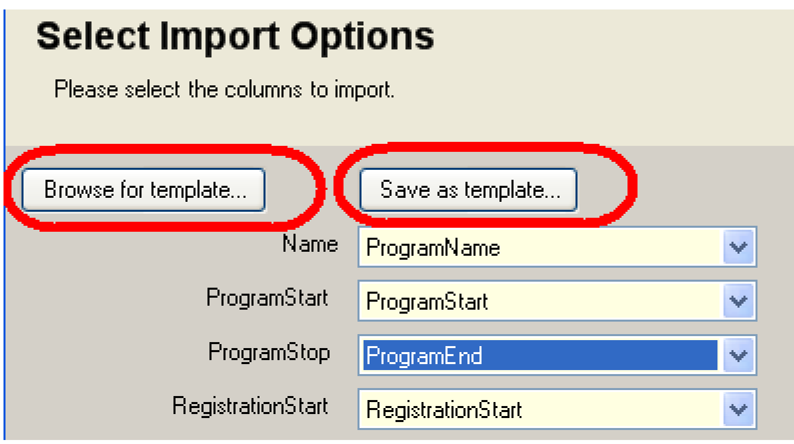
Documents and Images Import Enhancement – Organizations will appreciate the ability to Import multiple images and documents at one time**.**

Each of the new import wizard's process similarly, example of Form Import and Fundraising Campaigns import are shown below.

Each Import Wizard allows you to save a CSV template file, with appropriate column headers, that can then be filled out for importing. Using these templates allows the import wizard to automatically match column headers in the file with those expected in the import.

As an alternative, if you already have a file with well known headers, you do the column mapping once – then save the template for re-use the next time the data import wizard is used.

This approach is accomplished using the "Save as template..." and "Browse for template..." buttons found on each import wizard.



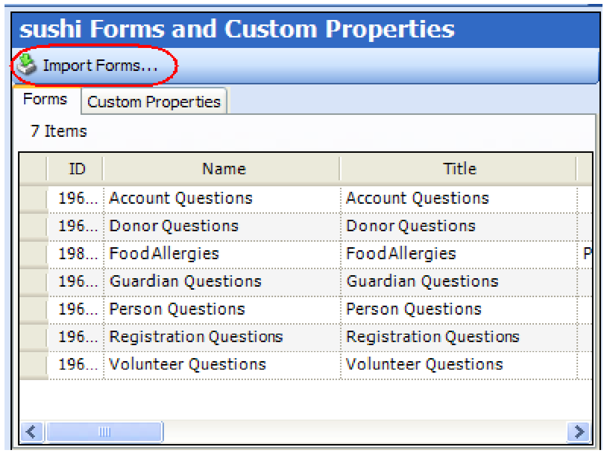
Importing Forms

Forms can now be created in a CSV spreadsheet and then uploaded into the Rainier Desktop. Follow these steps to create and upload your Forms.

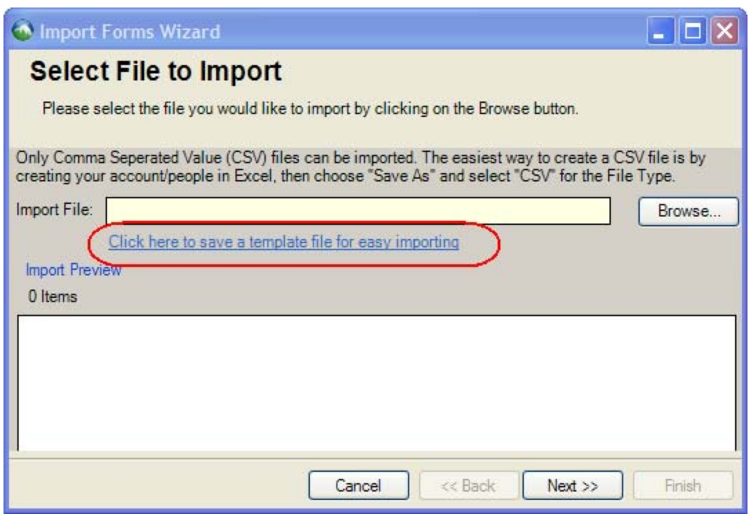
1. Select Organization Management in the Rainier Desktop.

2. Select Forms and Custom Properties from the tree directory.

3. Choose the Import Forms button.



4. On the Import Wizard window, select the 'Click here to save a template file for easy importing' link. This will open a dialogue window to allow you to save the file to your computer.



5. Open the Form Template.csv file you saved to your computer and enter the 'Form' data. The column's are detailed below

- Form Name – This will be the name of the form itself. The form name will display in the Rainier Desktop as well on the website, as the form title. If your form contains multiple questions, you may repeat the form name in several rows.

	A	B	C	D
1	FormName	QuestionName	QuestionDisplayName	QuestionDataType
2	Food Allergies	Shellfish	Are you allergic to shellfish?	YesNo
3	Food Allergies	Nuts	Are you allergic to nuts?	MultiSelect
4	Food Allergies	Gluten	Do you have a gluten allergy?	YesNo
5				

- QuestionName – Name that will display in the Rainier reports and grids.

- QuestionDisplayName – Name that will display on the website.

- QuestionDataType – The type of answer you are looking for, this field must match exactly to the name identified here:

QuestionType	Definition
Text	a form field for a text answer
Text Box	a larger form field for a longer text answer
Numeric	form field requiring a number answer
Decimal	form field allowing a decimal number answer
YesNo	form field offers a Yes or No option in a drop down
*Select	form field that offers a drop down of choices entered by the admin
*MultiSelect	creates checkboxes for multiple answers from choices entered by the admin
Date	creates a drop down to select a month, day and year.
Time	creates a drop down to select hours and minutes
DateTime	creates a drop down to select month, day, year, hours and minutes
Phone	creates a form field for numeric entry, including the use of dashes
Name	creates a form field for first and last name
Currency	creates a form field for a dollar amount
Email	creates a form field for an email address. Field will check for proper formatting (email@domain.xxx)
Address	creates a single form field for address to be entered
Password	creates a form field for a password to be entered. Password must match options provided by the Admin
TrueFalse	creates a drop down with true or false options
*SelectVerticalRadio	creates choices with radio buttons laid out in a vertical fashion. Only one selection can be chosen
*SelectHorizontalRadio	creates choices with radio buttons laid out in a horizontal fashion. Only one selection can be chosen
ConsentForm	Creates a consent form. Values are typically 'I agree' and 'I decline' but can be modified by the admin. Please note that it is necessary to return to this question after the upload and add the consent verbiage.
YesNoNumeric	Creates a Yes/No radio button option on the website but provides numeric answers in the reporting grid. 0 = No and 1 = Yes
AgreementScale	Creates a scale of 1 – 10, with 1 being Strongly Disagree and 10 being Strongly Agree. You can edit the question after its uploaded to customize the agreement labels.

- FormDescription – This shows underneath the form title and can give additional information or direction on filling out the specific form.

- FormVisible – This field should contain a 0 or 1. 0 = No, 1 = Yes. This determines whether or not the form is visible on the website.

- FormPrePop – This field should contain a 0 or 1. 0 = No, 1 = Yes. This determines whether or not the form questions will pre-populate with the users last given answer when they return to this form.

- QuestionPossibleValues – The question types with asterisks (*) above require choices to be provided in this field. Choices should be separated by a pipe (|) symbol.

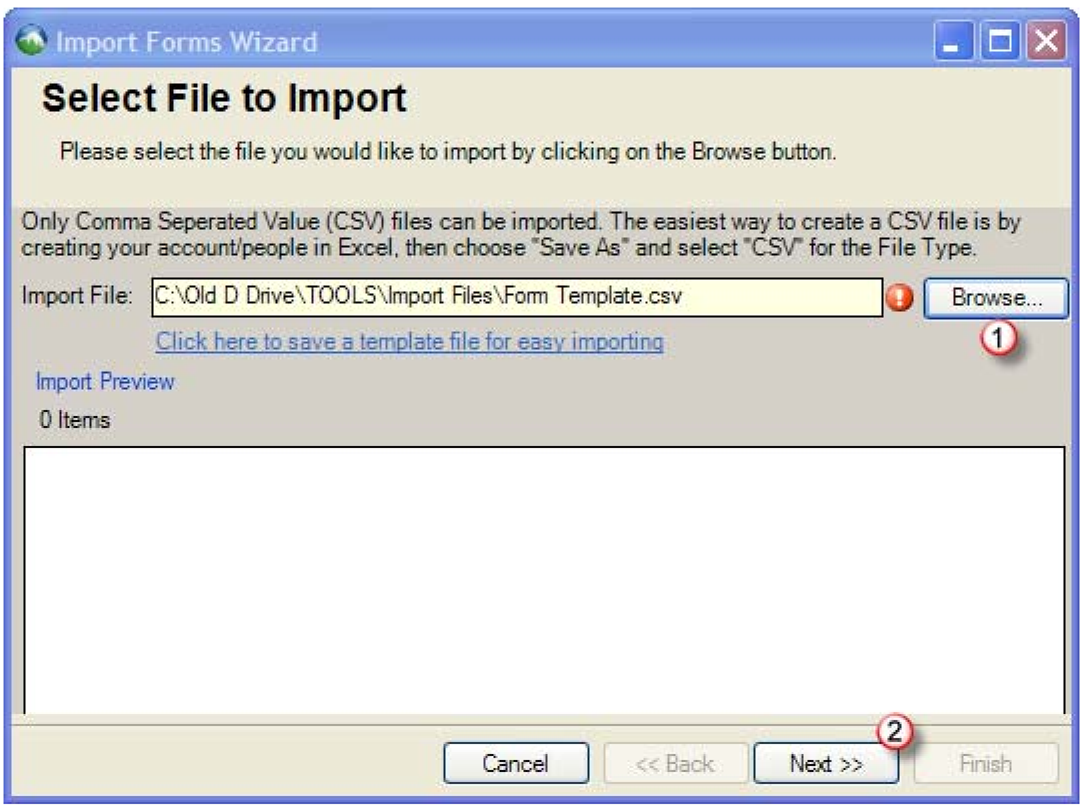
- QuestionDescription – This applies to the ConsentForm type question. Consent verbiage should be entered here.

- QuestionRequired - This field should contain a 0 or 1. 0 = No, 1 = Yes. This determines whether or not an answer is required for this question. Note that consent forms and password type questions should almost always be required.

- QuestionVisible - This field should contain a 0 or 1. 0 = No, 1 = Yes. This determines whether or not the question is visible on the website.

- QuestionDisplayOrder – Numbering your questions, starting with 1, will set the display order of your questions within this form.

6. Save your CSV file and return to the Rainier Desktop. Select the Browse button on the Import Forms Wizard. Browse to your CSV File and select Next.



7. On the Select Imports screen, you can map columns if you've changed the name of a column. If you're using the template, you won't need to make any adjustments on this screen. Select Next.

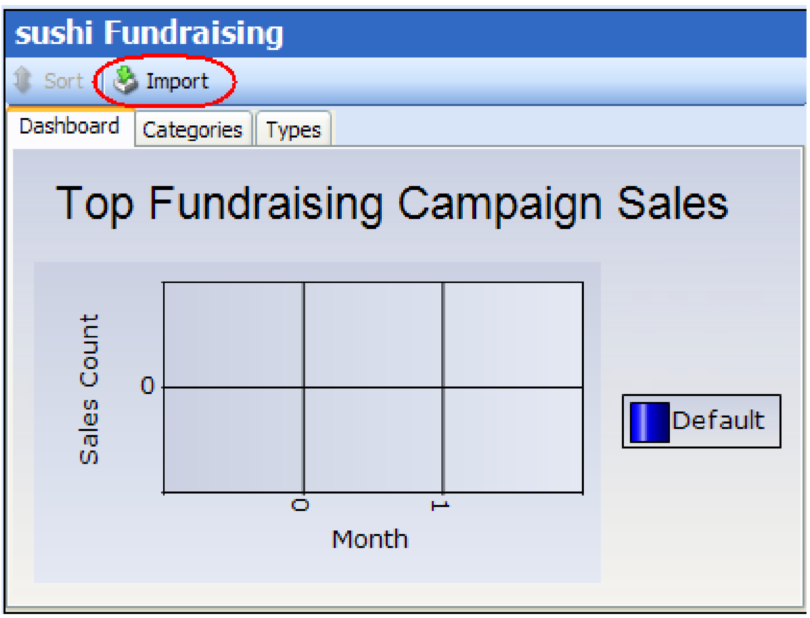
8. The final screen will show you a summary of the data that will be processed and report any errors that may prevent the import from succeeding. You can use the back button to make changes or re-open your import file, make changes and save it and begin the import process again. Once you are ready to commit the data into the system, select Finish.

Importing Fundraising Campaigns

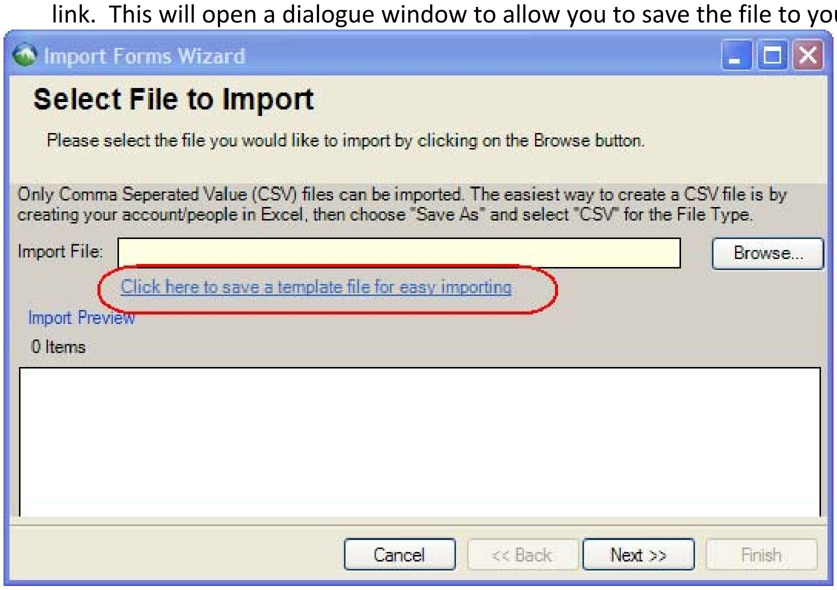
Fundraising campaigns can now be created in a CSV spreadsheet and then uploaded into the Rainier Desktop. Follow these steps to create and upload your fundraising campaigns.

1. Select Fundraising in the Rainier Desktop.

2. Select your organization name in the top of the tree directory. Choose the Import button.



3. On the Import Wizard window, select the 'Click here to save a template file for easy importing' link. This will open a dialogue window to allow you to save the file to your computer.



4. Open the Form Template.csv file you saved to your computer and enter your data

- ProductName – This will be the name of the fundraising opportunity and will show in the Rainier Desktop.

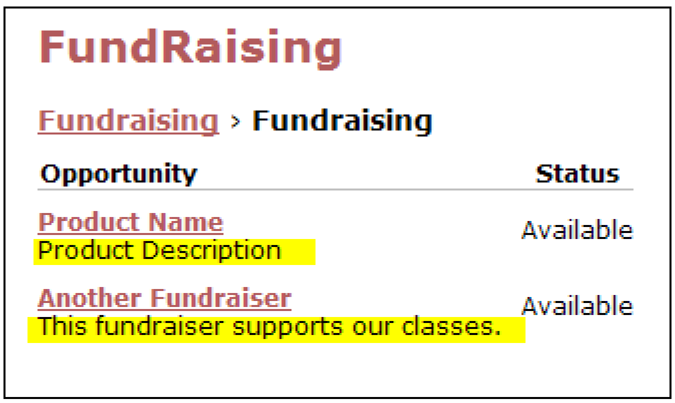
- PriceAmount – Total price being charged for this fundraising opportunity

- PricePurchasableStart – Date and time that the price should appear on the website and be purchasable.

- PricePurchasableStop – Date and time that the price should disappear from the website and no longer be purchasable.

- ProductDisplayName – Name of the fundraiser that will appear on the Rainier Website.

- ProductDescription – This text shows on the website, under the Product Name on the Fundraising page that lists available fundraisers.



5. Save your CSV file and return to the Rainier Desktop. Select the Browse button on the Import Forms Wizard. Browse to your CSV File and select Next.

6. On the Select Imports screen, you can map columns if you've changed the name of a column. If you're using the template, you won't need to make any adjustments on this screen. Select Next.

7. The final screen will show you a summary of the data that will be processed and report any errors that may prevent the import from succeeding. You can use the back button to make changes or re-open your import file, make changes and save it and begin the import process again. Once you are ready to commit the data into the system, select Finish.

Other Enhancements and Bug Fixes

In Release v2.1.1, as will be typical, we addressed dozens of bug fixes and numerous small enhancements requested by various organizations. We appreciate all the organizations and the part they play in the ongoing development and enhancement of the Rainier software platform. We would like to thank:

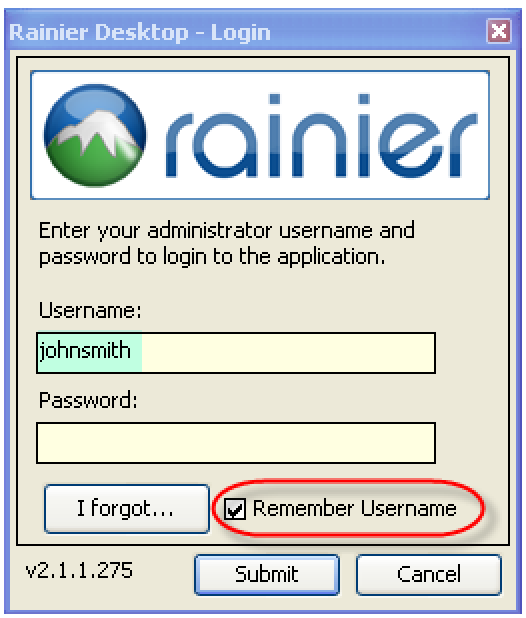
- Bellevue Boys Lacrosse Club
- Derrick Skating Club
- Lake Travis Youth Association
- Mitsubishi Electric HVAC
- North Street Schools PTA

- Olathe Girls Softball Association
- San Jose American Little League
- United States Youth Volleyball League
- Sherman Oaks Little League
- West Side Little League
- United States Youth Volleyball League
- Mount Paran North Sports Ministry
- Newmarket Soccer Club
- Longmont Baseball
- Whistler Racquet Club
- Kirkland Boys and Girls Club

Enhancements

Save Admin Username

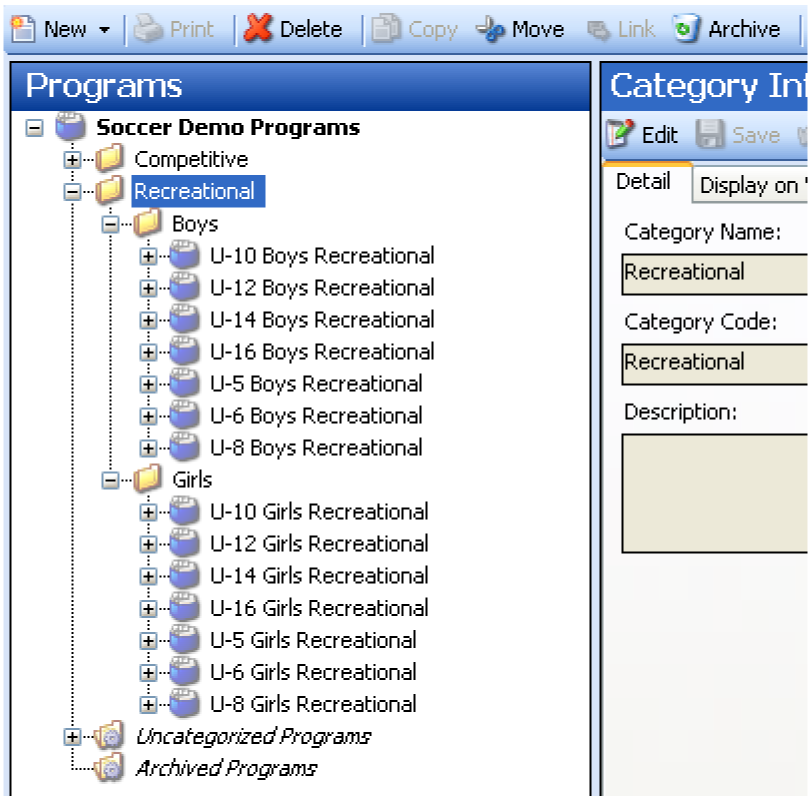
The Rainier desktop application has a new login screen! Users now have the option to remember account username. We no longer require an account membership to be assigned.



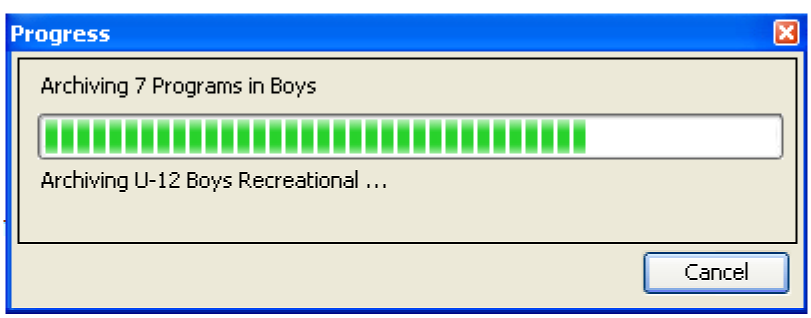
Category level program archive

Rainier now provides the ability to Archive programs from the category level. This will result in programs being archived maintaining the category hierarchy. As an example, archiving the category "Recreational" below will archive all of the program's beneath it.

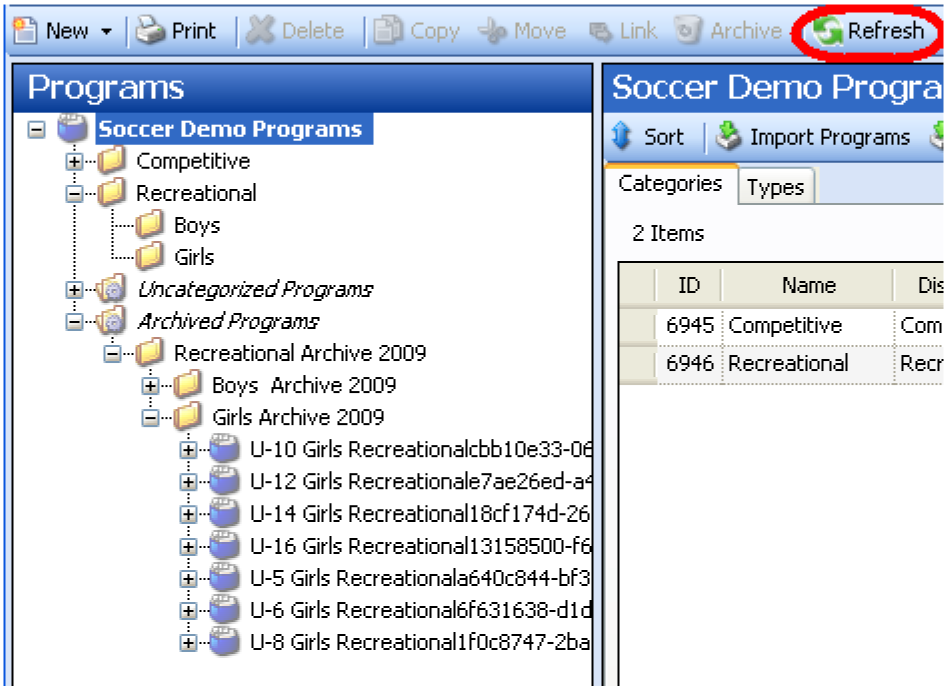
There will be multiple warnings displayed; this is simply because archival is permanent and you need to be sure it is appropriate for all programs in the category and sub categories.



You will see the progress bar providing you with an indicator where the process is…

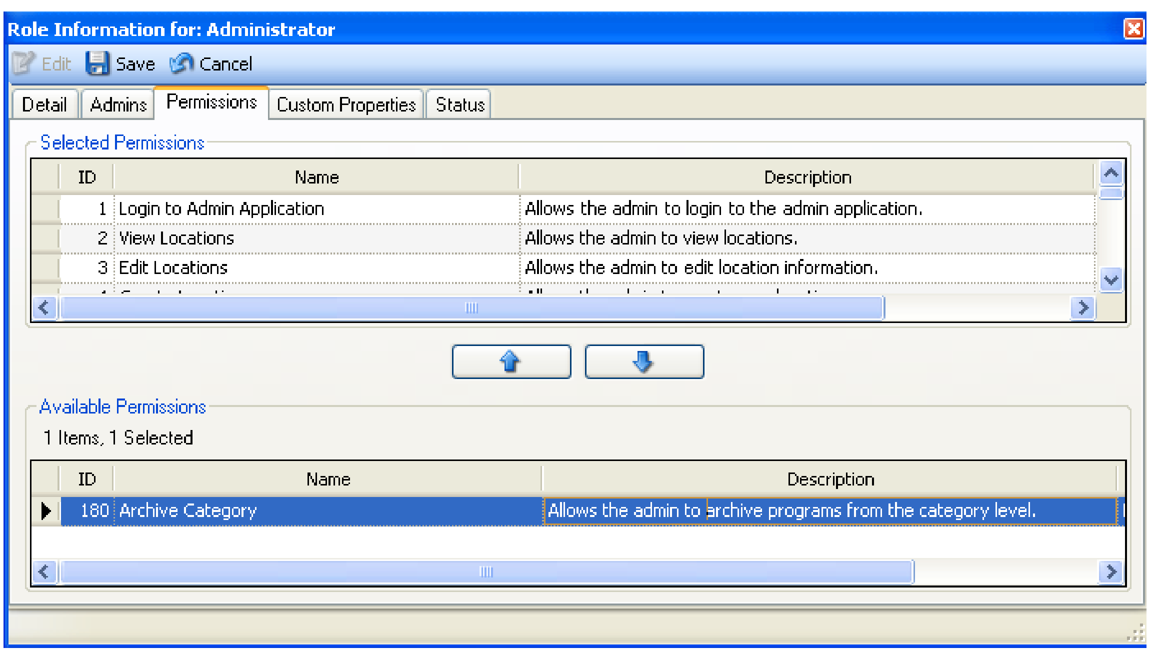


When the process has completed, you may need to refresh the display:



Notice that each category is created in the Archive Node with the suffix of "Archive 2009" where 2009 is the current year. Each Program will maintain the categorization in the archive node.

There is a new Permission required for archiving categories. Your organization administrator will need to associate that permission with the appropriate roles in the organization.



Custom payment amount on website

By default, payment amounts on the organization website must be either the minimum payment amount for the price purchased or the full amount. A new setting in the Payment category, "Allow Custom Payment" has been added that when set to true will allow the website client to enter any amount when making payment. The default is "false".

Payment	
Allow Bankcard payments	False
Allow Cash Payments	False
Allow Check payment (in person)	False
Allow Custom Payment	False
Allow Giftcard payments	False
Allow Offline Bankcard payments	False
Allow Pay In Person	False
Allow Payment On Website	False
Allow promo code entry	False
Allow Purchase Order Payment	False

Global grid setting

A new setting has been added to the Organization section that controls how column settings are saved on program grids (Registration/Volunteers/Sponsers/etc).

Currently, the column configuration is unique per program – which means the first time a grid is viewed, the admin must configure the column settings.

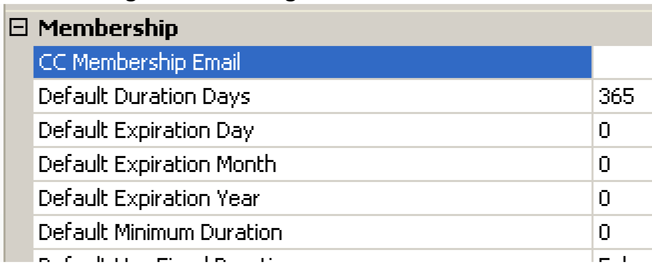
When "Use Unique Grid Names" is false, all the program grids will have the same column configuration, meaning the admin can configure the columns once and the configuration will remain the same in each program.

The one caveat is the use of custom questions. When custom questions exist, they cannot be specifically included/excluded in the grid column settings.

Organization	
Days before passwords expire	90
Default Cancellation Fee Amount	0
Default State	Washington
Display Sales Chart Dashboards	False
Display Uncategorized Programs	False
Enable Cart Functionality	False
Number of days of history to show on website	0
Session Timeout Warning Grace period	300
Show Add To VCalendar	True
Show Add To VCalendar on Calendar	True
Show Map Link	False
Show Session Timeout Warning on Website	True
Use Unique Grid Names	True
Verify Email	False

Membership cc email

A new configuration setting that can be used to CC membership confirmations to a specific email address.

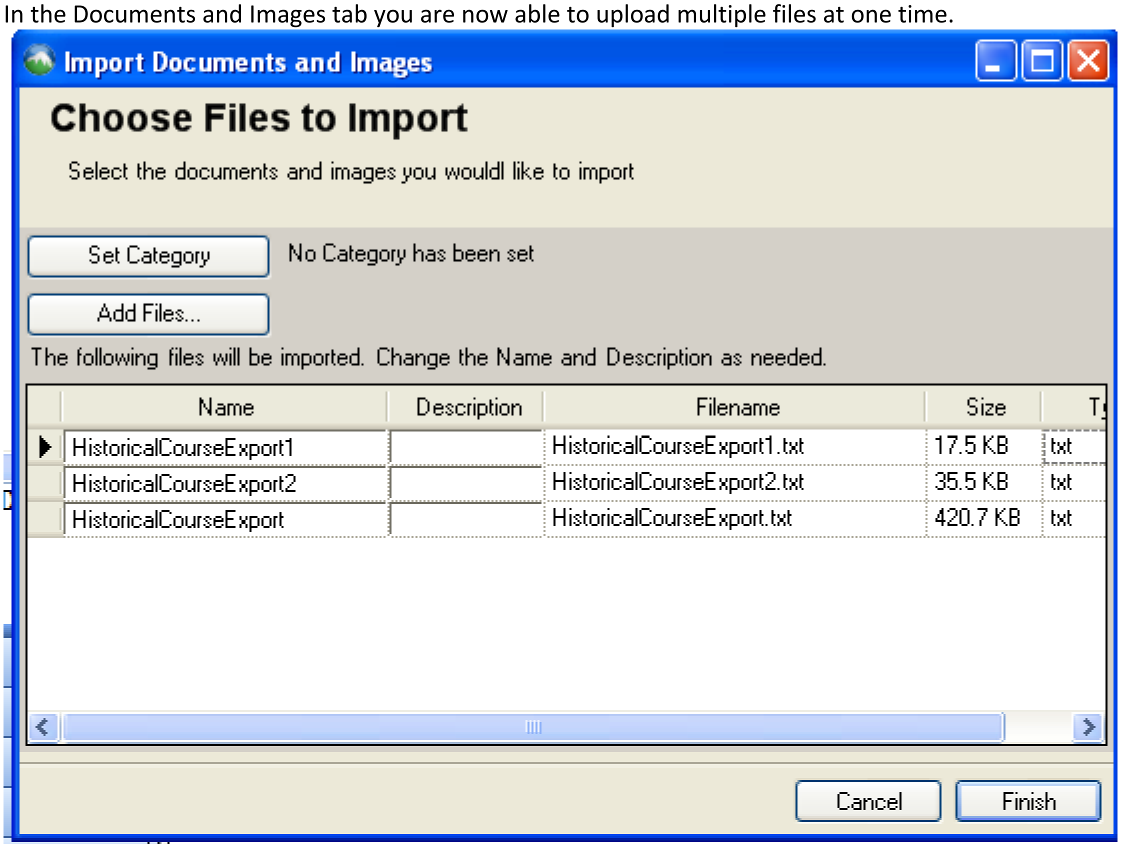


Including column headers in CSV grid export

This setting causes column headers to be included in the CSV output when exporting from grids.

Multiple document import

In the Documents and Images tab you are now able to upload multiple files at one time.



Bugs squashed

Cancelled membership is really cancelled:

Categorized archived programs “disappearing” on copy or move:

ESC 00004481: Request to make birthdate control more tab friendly

ESC 00007768: Coach Travel Time not being accounted for

ESC 00007824: Unable to delete a team

ESC 00007861: Individual Membership is allowed to be purchased twice.

ESC 00007959: Address not populating on My Account page.

ESC 00007747: Unable to print calendar/events from Team Page.

ESC 00007056 Updating Scores on Team Pages throws "Server Error in '/' Application." error.

ESC 00007085 Updating Scores on Team Pages throws "Server Error in '/' Application." error.

ESC 00007780: Server Error in '/' Application error when trying to self-schedule.

ESC 00007909: Minimum Balance Due doesn't update after promotion coupon is applied

ESC 00007857: MSIE7 does not swap US States to Canadian Provinces when selecting country

ESC 00007827: Export Selected Data to XML throws error.

ESC 00007989: All persons displaying twice in one account.

ESC 00009010: Program Custom Answers are not copied in Program Copy

