

Banner Enrollment Management Suite Relationship Management Ratings – Probability and Desirability Training Workbook

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Revision History Log

Publication Date	Summary
4/3/2009	New version to support Relationship Management 1.2 software.
10/09/2009	Revised to support Relationship Management 1.3 (new name and features).
08/13/2010	Revised screenshots to reflect new look/tabs in Relationship Management 1.4

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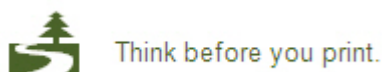


Table of Contents

Introduction to Ratings	4
Ratings Overview	6
Probability and Desirability	7
Probability Model Example	9
Desirability Model Example	11
Ratings Instance	13
Probability Instance Example	14
Desirability Instance Example	15
Instance Summary and Statistics	16
Model Design Process	18
Designing the Models	19
Using Expression Attributes	20
Ratings vs. Funnels	21
Score Calculation	22
Working with Ratings	23
The Ratings Menu	24
Creating a Model Definition	25
Copying a Model Definition	28
Editing an Existing Model Definition	30
Adding Factors to a Model	31
Editing Model Factors	36
Creating an Instance	38
Editing an Existing Instance	47
Running an Instance On Demand	49
Stopping or Suspending an Instance	51

Introduction to Ratings



Course goal

The goal of this course is to introduce Relationship Management administrators to ratings functionality, allowing them to classify prospects according to numeric probability and desirability criteria.

Course objectives

At the end of this session, participants will be able to:

- identify ratings in Banner Enrollment Management
- describe the concepts of probability and desirability
- build a ratings model
- copy a ratings model
- build a ratings instance
- perform institutional pre-work
- calculate and view results.

Intended audience

Administrators of Relationship Management

Prerequisites

To complete this course, you should have

- completed the Relationship Management: Expressions Administration workbook
- access to the **Administration** tab of Relationship Management

Ratings Overview

What is a Rating?

For Recruiting & Admissions Relationships, a rating is a way to assess a point value, or score, to an individual prospect based on how that prospect measures against institutionally defined factors.

Ratings are:

- used to quickly identify / assess candidate prospects that align with enrollment goals
- used to identify populations for targeted and specialized recruiting campaigns.

Ratings in Relationship Management:

Ratings are another implementation of the Lifecycle Management core components. Lifecycle Management components are also used by funnels. Like funnels, ratings are derived from model definitions and running instances.

The first ratings introduced are Probability and Desirability (P&D).

- We provide customizable P&D definitions
- We provide current scoring information for prospects
- We provide graphical representation of the prospect's score and its relationship to the pool of prospects within the same term and level.

Implementation of Ratings is optional.

Probability and Desirability

What is Probability?

Probability represents the likelihood that a prospect will enroll in the institution.

What is Desirability?

Desirability represents how closely a prospect matches the enrollment goals and objectives of the institution.

Probability and Desirability Ratings Concepts

The Ratings Model provides the definition for Probability and Desirability structures.

Each rating has its own set of models:

- Unique set supports Probability
- Unique set supports Desirability

The Model definition includes the name and description of the model.

Probability and Desirability models are structured the same way. The expressions and factors that you use to create these models will dictate how they are used at your institution.

Model Factors

A model definition is made up of factors, which represent significant points of measurement.

Factors are grouped into six classifications:

- Demographic Factors
- Admissions Activity Factors
- Financial Aid Factors
- Academic Factors
- Interaction with Institution Factors
- Other Factors

Each factor is linked to an expression and is assigned a defined point value. These point values are numeric values and can include negative numbers.

Prospects who meet the criteria of a factor receive the allocated points associated with that factor.

The order / sequence of factors is irrelevant in determining the prospect's overall score. As long as an individual meets the definition, points will be awarded.

Probability Model Example

Example

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Probability Model Actions New Refresh Open Copy Delete More Actions Close

Sample.Probability.Model

Model Overview

Description: Sample Probability Model

Factors

- Demographic Factors**
4 factors entered with point values between -11 and 8
- Admission Activity Factors**
1 factor entered with point value 8
- Financial Aid Factors**
1 factor entered with point value 9
- Academic Factors**
3 factors entered with point values between 7 and 7
- Interaction with Institution Factors**
3 factors entered with point values between -15 and 18
- Other Factors**
1 factor entered with point value 9

Add Factors

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Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Probability Models

Model Overview

Model Factors

Probability Model Actions New Refresh Open Copy Delete More Actions Close

Sample.Probability.Model

Demographic Factors

Within Zip Code Range
Description: Prospects who reside within a three-digit zip code range of the institution
Point Value: 8

In State
Description: Prospects who reside within the institution's state
Point Value: 7

In Adjacent States
Description: Prospects who reside in states adjacent to the institution's state
Point Value: 7

Low Probability States
Description: Prospects who reside in states that are less likely to enroll
Point Value: -11

Admission Activity Factors

Test Scores Submitted
Description: Prospects who have submitted test scores in the past year
Point Value: 8

Financial Aid Factors

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Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Probability Models

Model Overview

Model Factors

Probability Model Actions New Refresh Open Copy Delete More Actions Close

Sample.Probability.Model

Point Value: 7

High School GPA
Description: Prospects with a GPA above the threshold
Point Value: 7

Interaction with Institution Factors

Campus Visit
Description: Prospects who have visited the campus at least once
Point Value: 18

More than 5 Interactions
Description: Prospects who have had more than four interactions with the institution
Point Value: 10

1 or No Interactions
Description: Prospects who have had only one, or no, interactions with the institution
Point Value: -15

Other Factors

Parental Legacy
Description: Prospects with parents who have attended the institution
Point Value: 9

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Desirability Model Example

Example

The screenshot displays the SunGard Banner Relationship Management software interface. At the top, a navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help button. Below the navigation bar, the main content area is titled 'Desirability Model Actions' and includes a toolbar with icons for New, Refresh, Open, Copy, Delete, More Actions, and Close. The central part of the interface shows the 'Sample.Desirability.Model' with a 'Model Overview' section. This section includes a description: 'Sample Desirability Model'. Below the description, there are three categories of factors: 'Demographic Factors' (3 factors entered with point values between 7 and 10), 'Academic Factors' (5 factors entered with point values between -12 and 15), and 'Other Factors' (3 factors entered with point values between 5 and 14). An 'Add Factors' button is located at the bottom right of the main content area. The footer of the interface contains copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 327)' and the SunGard Higher Education logo.

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Desirability Models

Model Overview

Model Factors

Desirability Model Actions New Refresh Open Copy Delete More Actions Close

Sample.Desirability.Model

Demographic Factors

Underrepresented Ethnicities
Description: Prospects in underrepresented ethnic groups
Point Value: 7

Out of State
Description: Prospects who reside outside the institution's state
Point Value: 8

Not Local Citizen
Description: Prospects who are not citizens of the institution's country
Point Value: 10

[Add Admission Activity Factors](#)

[Add Financial Aid Factors](#)

Academic Factors

Low HS GPA
Description: Prospects with GPAs below the accepted threshold
Point Value: -12

[Link HS GPA](#)

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Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Desirability Models

Model Overview

Model Factors

Desirability Model Actions New Refresh Open Copy Delete More Actions Close

Sample.Desirability.Model

Point Value: 15

Nursing Majors
Description: Prospects interested in majoring in Nursing
Point Value: 6

Biology Majors
Description: Prospects interested in biology majors
Point Value: 9

[Add Interaction with Institution Factors](#)

Other Factors

Musical Interests
Description: Prospects interested in musical activities
Point Value: 5

Leadership Programs
Description: Prospects interested in leadership programs
Point Value: 11

Honors
Description: Prospects who are members of honor societies
Point Value: 14

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Ratings Instance

Introduction

A Ratings Instance is a working implementation of a model used to derive scoring for a specific term and level.

Statuses

A Ratings Instance can have any of the following statuses:

- Ready – active and waiting to calculate
- Started – currently running (has calculated)
- Completed – no longer running for expired recruiting period (the end date has passed)
- Stopped – manually stopped
- Suspended – temporarily stopped until reactivated
- Resumed – reactivated after suspended, waiting to recalculate (similar to Started)
- Cancelled – used before calculating when instance was created in error

Ratings instances are scheduled for processing; recurring calculations are scheduled for each ratings instance.

Multiple Ratings Instances may be active at any time.

Probability Instance Example

Example

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 327) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). The right side of the top bar contains links for Preferences and Sign Out, along with a Help icon.

The main content area is titled "Probability Instance Actions" and includes buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this, the "Instance Overview" section for "Sample.Probability.Model" is shown. The overview includes the following details:

- Model:** Sample.Probability.Model
- Description:** Sample Probability Model
- Term:** Fall 2010 (201110)
- Level:** Undergraduate (UG)
- Status:** Started
- Active:** Yes
- Last Successful Execution:** Jul 20, 2010 2:09 PM
- Begin Date:** Jul 20, 2010 12:00 AM
- End Date:**

Below the overview, there is a section for "Instance Calculation Schedule" with a link to "Add Schedule".

On the right side, the "Instance Summary" panel provides an overview of the instance, including its description, status, and last successful execution. A "Calculate" button is present. Below this, the "Instance Statistics" panel shows the "Number of Participants" (244) and "Scores" (Average: 10.83, Maximum: 31, Minimum: -15).

At the bottom of the main content area, there are buttons for "Stop Instance" and "Suspend Instance".

The footer of the interface includes the copyright notice "© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 327)" and the "SUNGARD HIGHER EDUCATION" logo.

Desirability Instance Example

Example

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 327) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A 'Help' button is located in the top right corner. The main content area is titled 'Desirability Instance Overview' and features a sidebar on the left with a 'Desirability Instances' link. The central panel shows the 'Sample.Desirability.Model' instance overview, including a table of instance details and a calculation schedule. The right sidebar contains an 'Instance Summary' section with an 'Overview' tab and an 'Instance Statistics' section with a 'Number of Participants' tab.

Instance Overview	
Model:	Sample.Desirability.Model
Description:	Sample Desirability Model
Term:	Fall 2010 (201110)
Level:	Undergraduate (UG)
Status:	Started
Active:	Yes
Last Successful Execution:	Jul 21, 2010 10:58 AM
Begin Date:	Jul 21, 2010 12:00 AM
End Date:	

Instance Calculation Schedule	
Daily at 11:00 AM (America/New_York) starting Jul 21, 2010 12:00 AM	

Instance Summary	
Overview	
Description:	Sample Desirability Model
Status:	Started
Last Successful Execution:	Jul 21, 2010 10:58 AM

Instance Statistics	
Number of Participants	
243	
Scores	
Average:	19.33
Maximum:	59
Minimum:	-12

Instance Summary and Statistics

Instance Summary

The instance summary provides status and last execution date for an instance.

▼ Instance Summary

Overview

Description:
Sample Desirability Model

Status: Started

Last Successful Execution:
Jul 21, 2010 10:58 AM

Calculate

Instance Statistics

Instance Statistics provides details on entire qualifying pool (all prospects for a given Term /Level/Model), such as:

- Number of Participants
- Maximum Score
- Minimum Score
- Average Score



Model Design Process

How it Works

1. A Probability or Desirability Model is defined.
2. A new Instance is implemented by choosing a Model.
 - A Term Code and Level Code are entered.
 - A recurring calculation schedule is entered.
3. At scheduled time, the calculation process kicks off.
 - The process executes expressions for each factor.
 - Prospects' meeting condition criteria are awarded the assigned points for each factor.
 - Point allocations for each factor are totaled and result in the overall score.
4. Scores are recorded and referenced in the Prospect Profile, under the menu item "Ratings".

Designing the Models

Designing the Models

Analysis Pre-Work is required by the institution:

- Probability: Evaluate Current / Historic Enrollment
 - What defines a typical enrolled student?
- Desirability: Evaluate Enrollment Goals / Objectives
 - What student characteristics represent high value to the institution?

Identify and define factors to be tracked:

- Demographic Factors
- Admissions Activity Factors
- Financial Aid Factors
- Academic Factors
- Interaction with Institution Factors
- Other Factors

Define a scoring system to award to each of the factors.

Build and test expressions that support each of the factors.

Using Expression Attributes

Using Expression Attributes

New Expression Attributes support targeting and query based on Probability and Desirability.

Relationship Management:

- Desirability Ratings
- Probability Ratings
 - "Rating" Instance Level
 - "Rating" Instance Name
 - "Rating" Instance Term
 - "Rating" Score
 - Does Not Have "Rating" Factor
 - Has "Rating" Academic Factor
 - Has "Rating" Admissions Activity Factor
 - Has "Rating" Demographic Factor
 - Has "Rating" Factor
 - Has "Rating" Financial Aid Factor
 - Has "Rating" Interactions With Institution Factor
 - Has "Rating" Other Factor

Population Lists can target "hot prospects."

Ratings vs. Funnels

Differences

How Ratings are different than Funnels:

- Ratings Models use "factors" - Funnel Models use "states"
- Ratings Models only use Qualifying States (all factors are stored as qualifying states)
- Ratings factors do not use BannerSource
- Ratings factors are grouped with similar factors under hard-coded labels; Funnel States are grouped by Qualifying/Disqualifying/Pending
- Ratings factors include a Point Value field (can use negative numbers)
- Order does not matter for Ratings factors processing (it does not include/exclude profiles - it just adds points if they meet the criteria)
- We do not store history for ratings - only the current ratings from the latest calculation of the instance are stored.

Score Calculation

Notes

- Zero is a valid score. It indicates that a prospect was evaluated and had as many positive points as negative points
- No seed data models are delivered for Probability & Desirability.

Working with Ratings



Introduction

This section provides procedures for creating and working with ratings.

Objectives

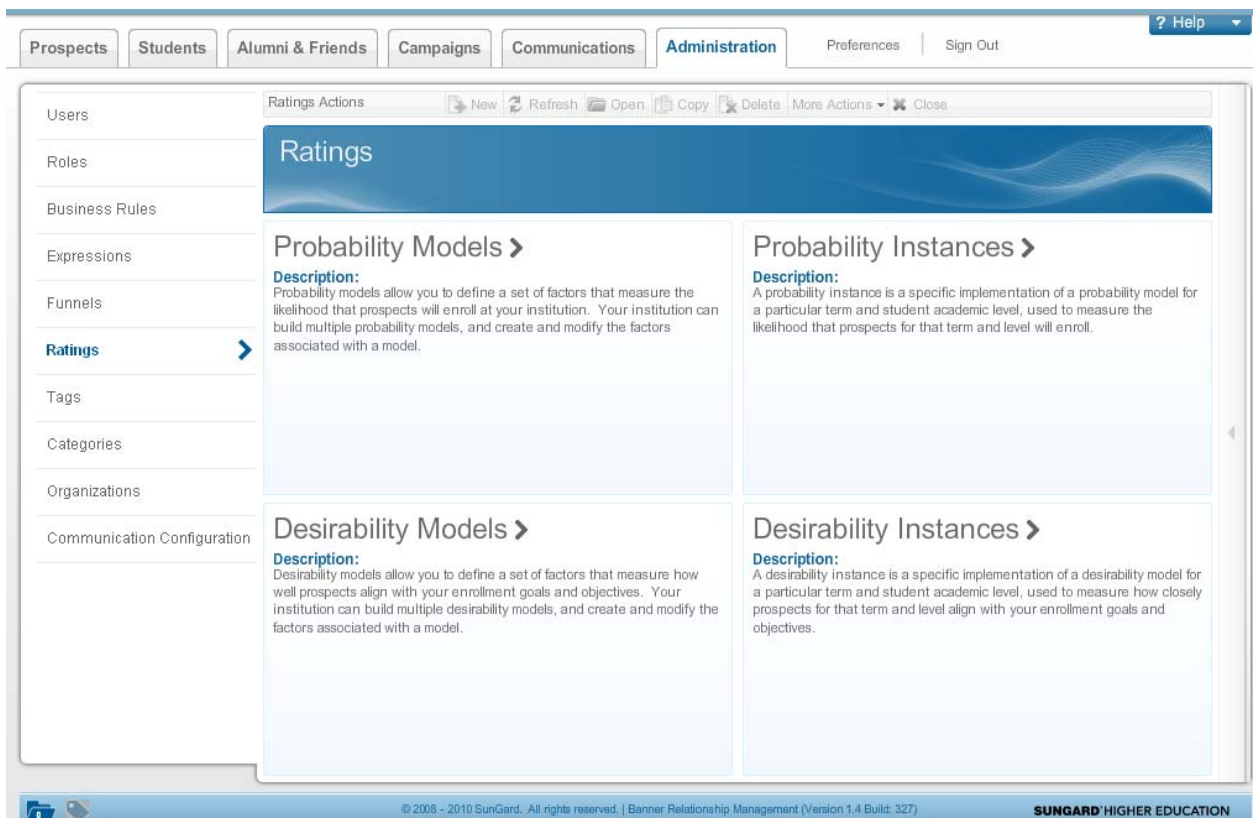
At the end of this section, participants will be able to:

- create a probability or desirability model
- create a probability or desirability instance
- adjust instances' frequency
- edit models and instances.

The Ratings Menu

Menu

The Ratings menu is accessed via the Administration tab. If your login for Relationship Management does not have Administrator roles set, you will not have access to this functionality.



From here, the administrator can create and edit:

- Probability Models and Instances
- Desirability Models and Instances

Creating a Model Definition

Introduction

Probability and Desirability models are structured the same way. The expressions and factors that you use to create these models will dictate how they are used at your institution.

The Probability Model is similar in structure to a Funnel in Relationship Management. It allows the administrator to define a set of factors that measure the likelihood that prospects will enroll at his or her institution. Your institution can build multiple probability models and create and modify the factors associated with each model.

Likewise, a Desirability Model allows you to define a set of factors that measure how well prospects align with your enrollment goals and objectives. Your institution can build multiple desirability models, and create and modify the factors associated with a model.

The examples in this section will work with Probability Models. The steps for creating a Desirability Model are the same, but you will choose different criteria when creating one of those than you would for a Probability Model.

Steps

1. From the Ratings menu of the Administration Tab, click on **Probability Models**.

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 327) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). The Administration tab is active, showing a sidebar with Ratings, Probability Models (selected), and Probability Instances. The main content area is titled "Probability Models" and features a search bar, an "Advanced Search" button, and a table with columns "Name" and "Description". The table displays one row: "Sample.Probability.Model" with the description "Sample Probability Model". The right sidebar contains a "Probability Instances" section and a "Model Summary" section with an "Overview" tab showing the description "Sample Probability Model". The footer includes the copyright notice "© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 327)" and the "SUNGARD HIGHER EDUCATION" logo.

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out ? Help

Ratings

Probability Models

Probability Instances

Probability Model Actions New Refresh Open Copy Delete More Actions Close

Probability Models

Search by Name

Advanced Search

Displaying 1 row.

Name	Description
Sample.Probability.Model	Sample Probability Model

Probability Instances

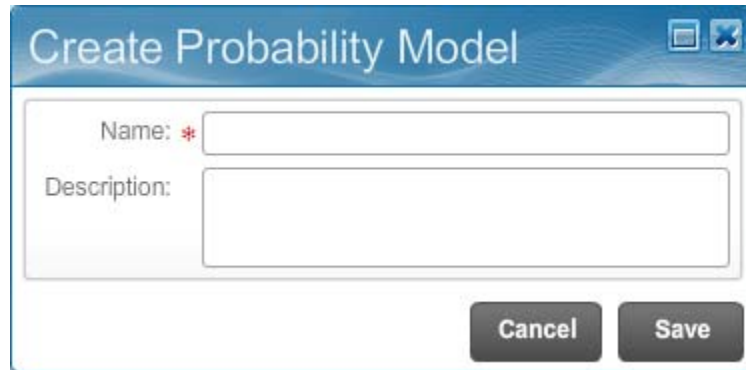
Model Summary

Overview

Description:
Sample Probability Model

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2. Select **New** from the **Probability Model Actions** bar to create a new model.

A screenshot of a 'Create Probability Model' dialog box. The dialog has a blue header bar with the title 'Create Probability Model' and two window control icons (minimize and close) on the right. Below the header, there are two text input fields. The first field is labeled 'Name: *' with a red asterisk indicating it is required. The second field is labeled 'Description:'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save'.

3. Enter a name for the model in the **Name** field.
4. If desired, enter a description for the model in the **Description** field.
5. Click **Save** to save your new model, or **Cancel** to exit without changes.

Copying a Model Definition

Introduction

Probability and Desirability models are structured the same way. The expressions and factors that you

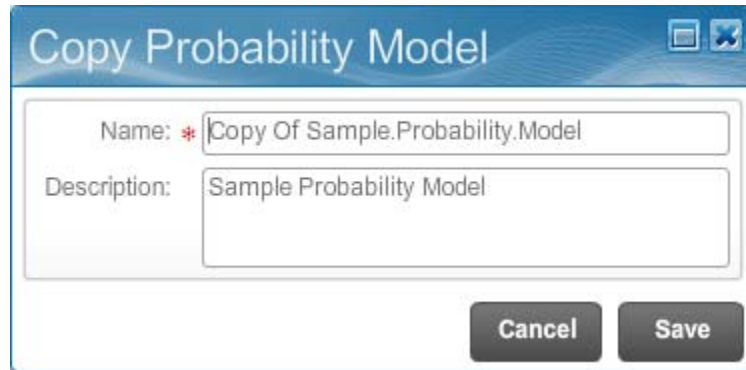
Steps

1. From the Ratings menu of the **Administration** Tab, click on **Probability Models**.

The screenshot shows the Banner Relationship Management (Version 1.4 Build: 327) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is active, showing a sub-menu with Ratings, Probability Models, and Probability Instances. The Probability Models section is expanded, displaying a table with one row: 'Sample.Probability.Model' with description 'Sample Probability Model'. The table has columns for Name and Description. The right sidebar shows the Probability Instances section and a Model Summary section with an Overview tab.

Name	Description
Sample.Probability.Model	Sample Probability Model

2. Select **Copy** from the **Probability Model Actions** bar to create a new model.

A screenshot of a software dialog box titled "Copy Probability Model". The dialog has a blue header bar with the title and standard window controls (minimize, maximize, close). Below the header, there are two text input fields. The first field is labeled "Name:" with a red asterisk indicating it is required, and it contains the text "Copy Of Sample.Probability.Model". The second field is labeled "Description:" and contains the text "Sample Probability Model". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Copy Probability Model

Name: * Copy Of Sample.Probability.Model

Description: Sample Probability Model

Cancel Save

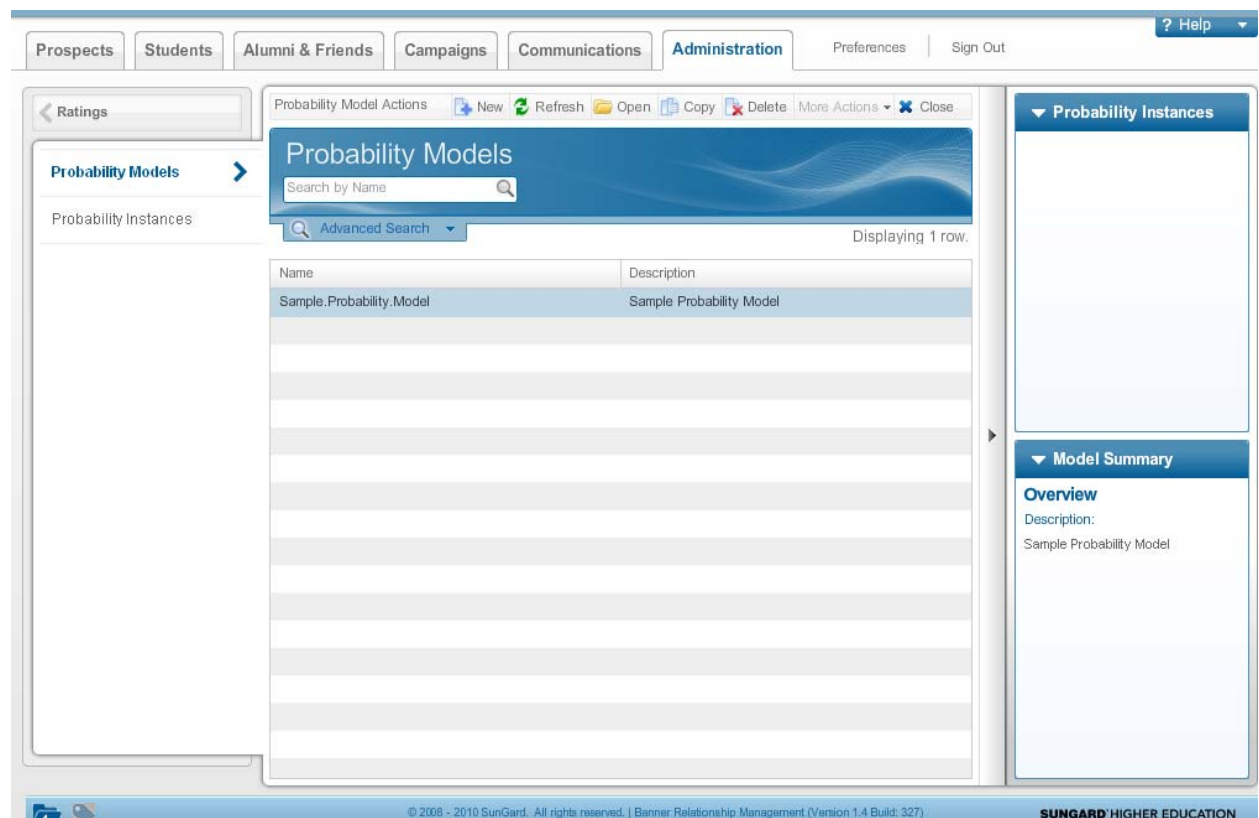
3. Enter a name for the model in the **Name** field.
4. If desired, enter a description for the model in the **Description** field.
5. Click **Save** to save your new model, or **Cancel** to exit without changes.

Editing an Existing Model Definition

Steps

To access an existing probability model:

1. From the Ratings menu of the Administration tab, select **Probability Models**.



2. Double-click the desired model from the menu to open it.
3. Alternatively, click the desired model from the menu and then click **Open** on the Probability Model Actions toolbar.

Adding Factors to a Model

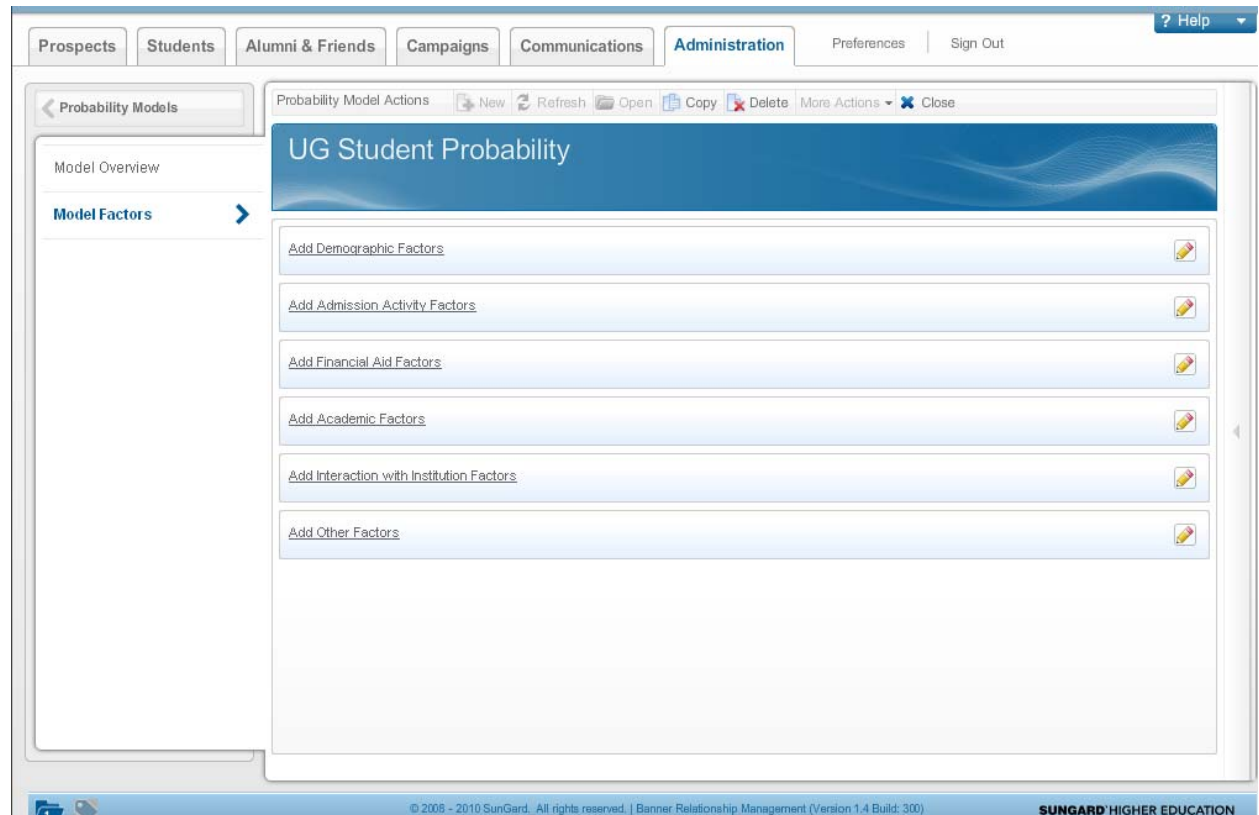
Introduction

To be useful, a probability model must contain factors. These factors set up the criteria by which the probability of each prospect applying or enrolling to your institution will be determined.

To receive a rating, the prospect must match ALL the criteria for each factor listed in the instance. For instance, you may select a large group of prospects who fit “state” criteria, but only those who match the state criteria AND ALL of the other factor criteria will be assigned a rating. Prospects who fit some but not all of the criteria will not receive a rating.

Steps

1. With your desired model open, either click the **Add Factors** button or click the Edit (✎) icon for the Factors block.
2. You will be presented with a set of factor categories.



- Each of these factor categories is structurally similar, containing **Name**, **Description**, **Expression** and **Point Value** fields.

Relationship Management: Ratings

- Click **Add Factors** to add a new factor to the model.

Edit Demographic Factors

Add Demographic Factors

Name: *

Description:

Expression: * ...

Point Value: * 0

Cancel Complete

Name	Description	Expression	Point Value

Cancel Add Factors Save

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- Enter a name for your factor in the **Name** field.
- If desired, enter a description for your factor in the **Description** field.

- Click the Look Up (⋮) icon to select an expression from the list of available expressions.

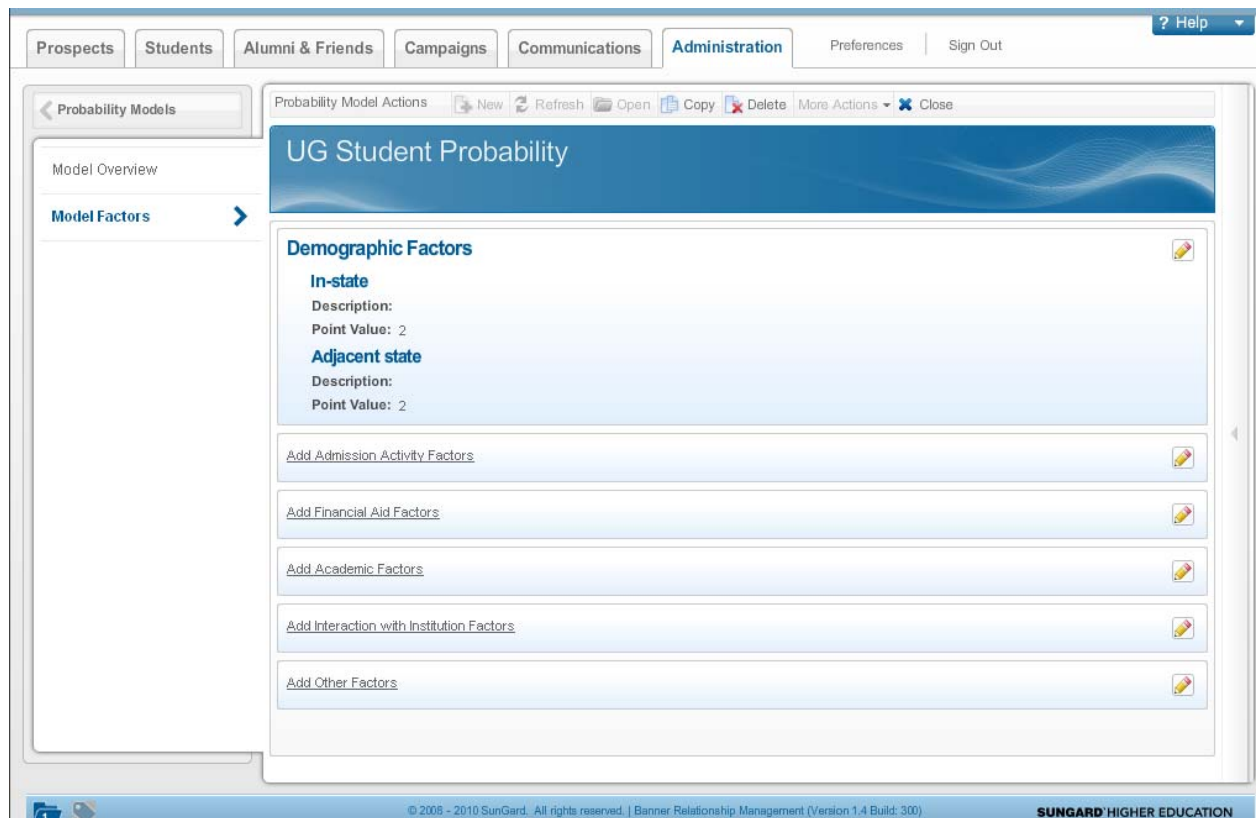
Note that Expressions are not created here, and will need to be set up in the Expressions functionality prior to adding them here. For more details, refer to the Expressions Administration workbook.

Make sure that you test your Expressions, confirming that the prospects listed in the population list fit the attributes in the Expression.

Expression	Description	Constituent Type
Funnel.Qualifying.Applicant	List of Applicants.	Prospect
Funnel.Qualifying.Confirm	Applicants who have accepted offe	Prospect
Funnel.Qualifying.Enroll	Applicants who have enrolled.	Prospect
Funnel.Disqualifying.ProspectWith	Prospects who have withdrawn for	Prospect
Funnel.Disqualifying.ApplicantWitl	Applicants who have withdrawn the	Prospect
Funnel.Qualifying.Inquiry	Prospects who have at least one ir	Prospect
Funnel.Qualifying.Admit	Applicants who have been accepte	Prospect
Funnel.Qualifying.Prospect	List of Prospects.	Prospect
Desirability.Acad.HS-GPA-Low	Expression used for desirability fact	Prospect
Desirability.Acad.NursingMajors	Expression used for desirability fact	Prospect

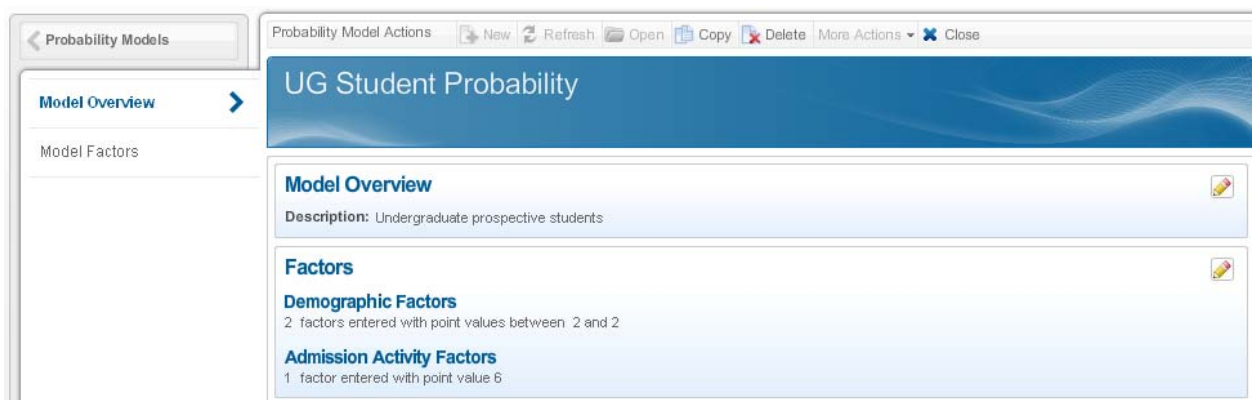
- Select a point value for this expression in the **Point Value** field.
- If your factor is set up as you wish it to be, click **Complete** to add it to the list of factors for this category.
- Repeat the above steps until all factors for this category have been added to the list in the lower window.
- Click **Save** to save your changes, or **Cancel** to exit without saving.

12. Your factors should be displayed on the main page for the probability model.



13. Repeat this process for other desired factor categories.

14. When you return to the Model Overview, you should see a list of factor categories that contain selected factors, with a breakdown of how many are in each category and what point values they contain.




Editing Model Factors

Introduction

Factors in probability models can be edited or removed easily, prior to any implementation of an instance using the model. Once a model has been implemented by creating an instance based on the model, the underlying model expressions or its factors cannot be changed.

Steps

1. Open your desired probability model.
2. Click the **Edit** () icon next to the factor category that you wish to edit.



UG Student Probability

Demographic Factors 

In-state
Description:
Point Value: 2

Adjacent state
Description:
Point Value: 2

Admission Activity Factors 

Test scores submitted
Description:
Point Value: 5

Add Financial Aid Factors 

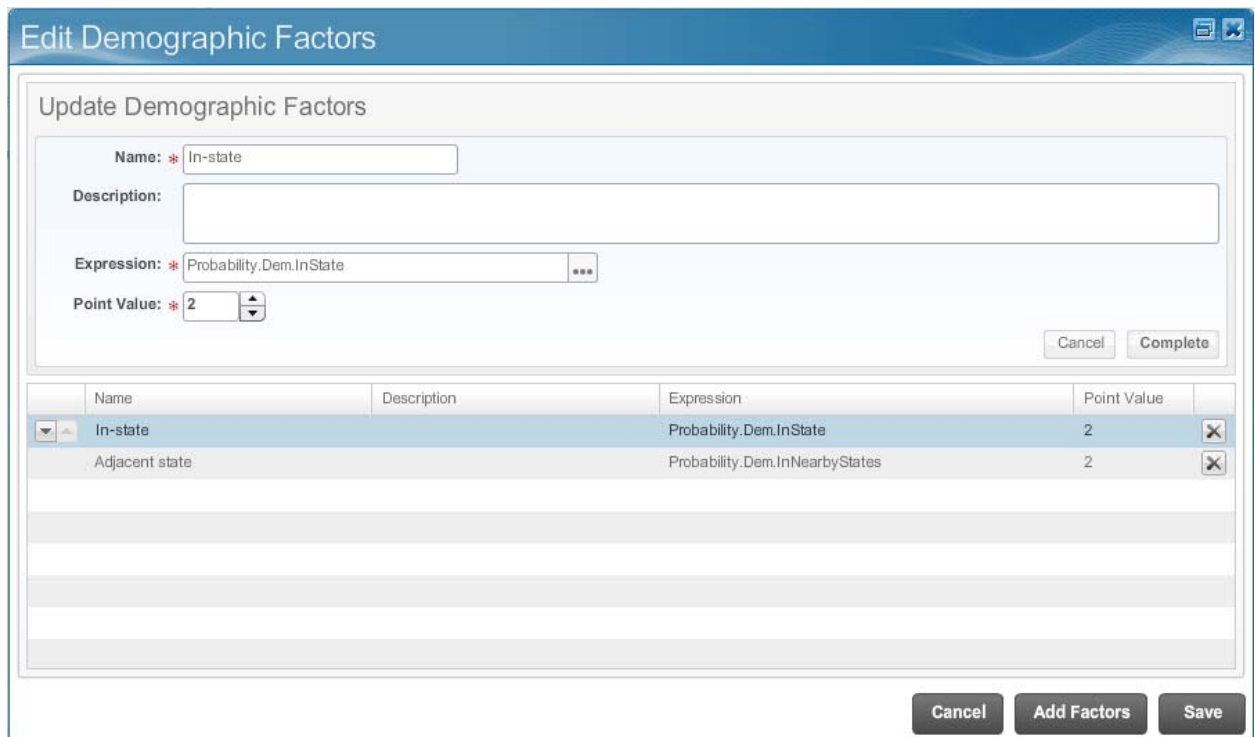
Add Academic Factors 

3. If you wish to delete a factor from the category, click the **Delete** (✕) icon for its row.



Name	Description	Expression	Point Value	
In-state		Probability.Dem.InState	2	✕
Adjacent state		Probability.Dem.InNearbyStates	2	✕

4. If you wish to edit a factor, double-click it to open it.



Update Demographic Factors

Name: * In-state

Description:

Expression: * Probability.Dem.InState ***

Point Value: * 2

Cancel Complete

Name	Description	Expression	Point Value	
In-state		Probability.Dem.InState	2	✕
Adjacent state		Probability.Dem.InNearbyStates	2	✕

Cancel Add Factors Save

5. Adjust the contents of the fields as desired. When you click **Complete**, your changes should be reflected in the lower window.
6. Click **Save** to save your changes to the factor category.

Creating an Instance

Introduction

A probability instance is a specific implementation of a probability model for a particular term and student academic level, used to measure the likelihood that prospects for that term and level will enroll.

Likewise, a desirability instance is a specific implementation of a desirability model for a particular term and student academic level, used to measure how closely prospects for that term and level align with your enrollment goals and objectives.

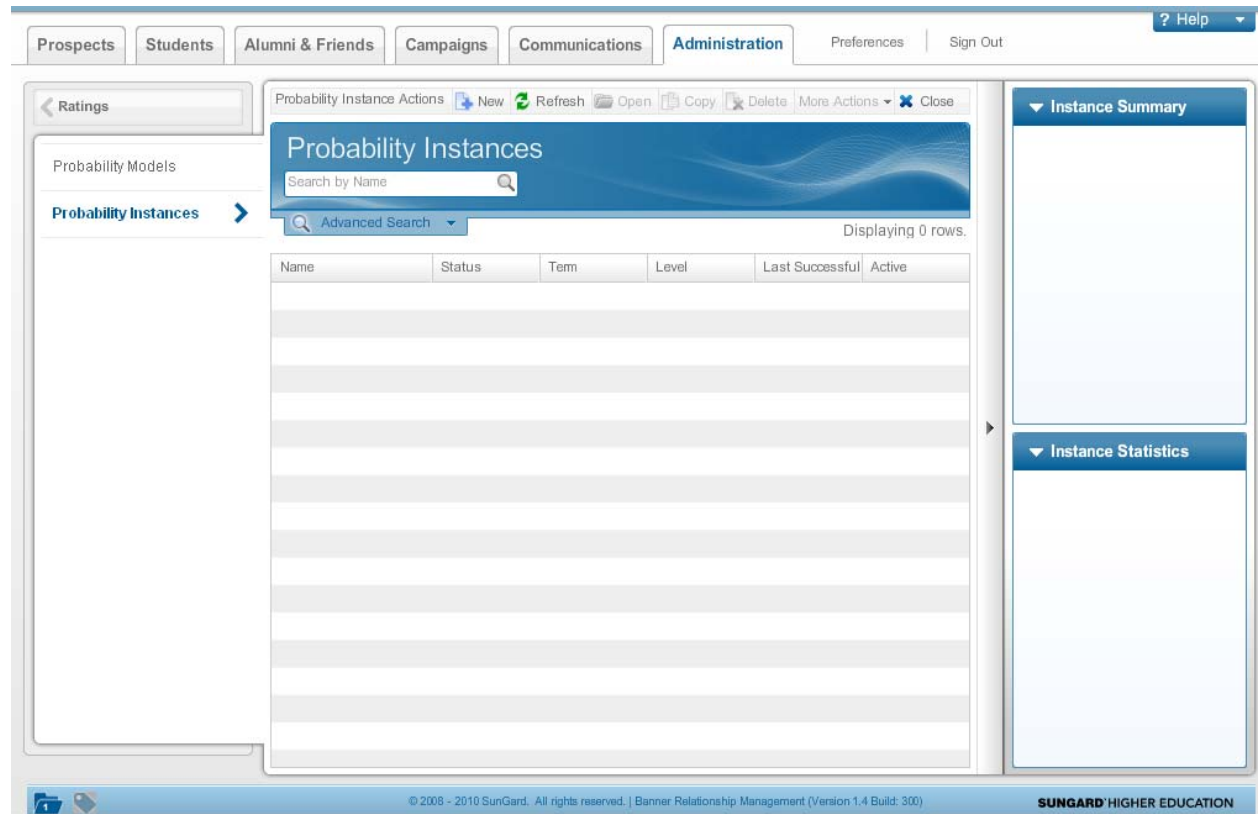
Probability and desirability instances are structured the same way. They will differ in your choice of factors, expressions and point values.

The examples in this section refer to Probability Instances; the steps for creating and editing Desirability Instances are the same.

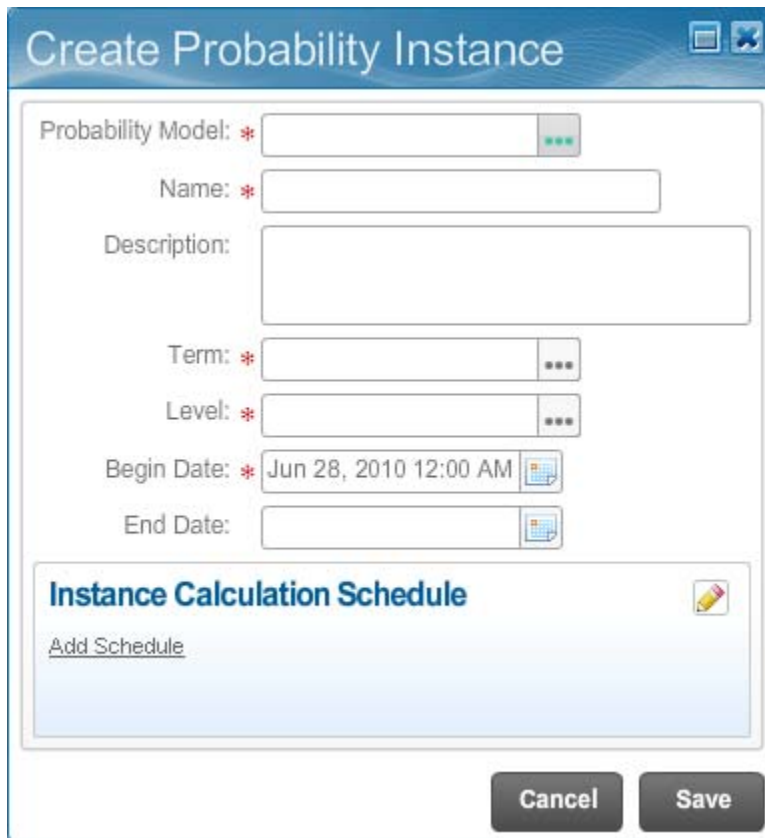
If you wish to change any of the Factors in an existing instance, you must create a new model and instance. When an instance is created, all of the expressions associated with the instance are locked into the Ratings calculation. Changing/adding/deleting an expression will not change the calculation of an existing Instance.

Steps

1. From the Ratings menu of the Administration tab, click **Probability Instances**.



2. Click **New** from the **Probability Instance Actions** bar to create a new instance.



The image shows a 'Create Probability Instance' dialog box. It has a title bar with the text 'Create Probability Instance' and two window control icons. The main area contains several input fields: 'Probability Model' with a dropdown arrow, 'Name' with a text box, 'Description' with a larger text box, 'Term' with a dropdown arrow, 'Level' with a dropdown arrow, 'Begin Date' with a date/time picker showing 'Jun 28, 2010 12:00 AM', and 'End Date' with a date/time picker. Below these fields is a section titled 'Instance Calculation Schedule' with a pencil icon and a link that says 'Add Schedule'. At the bottom right are 'Cancel' and 'Save' buttons.

Create Probability Instance

Probability Model: *

Name: *

Description:

Term: *

Level: *

Begin Date: * Jun 28, 2010 12:00 AM

End Date:

Instance Calculation Schedule

[Add Schedule](#)

Cancel Save

- Click the **Look Up** (⋮) icon for the **Probability Model** field to select a probability model from the list of available models.

Search for Probability Model

Search by Name

Advanced Search

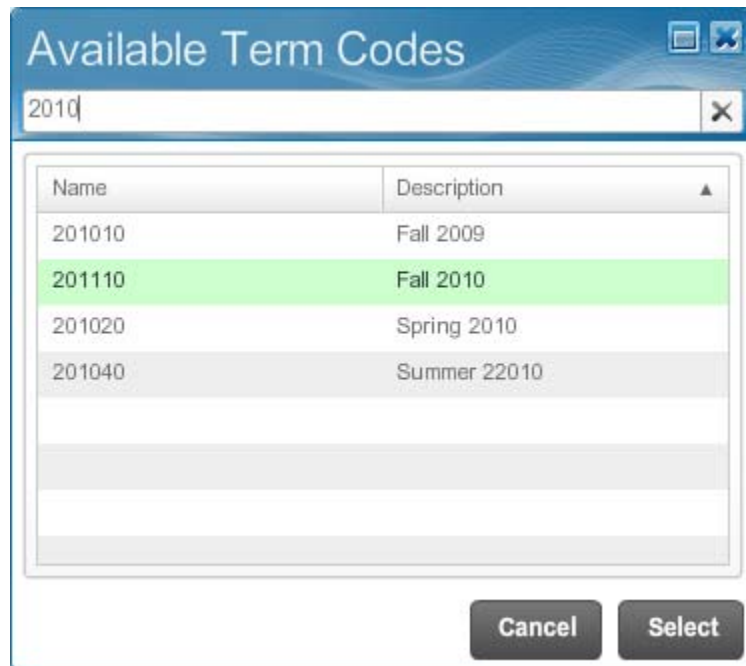
Displaying 2 rows.

Name	Description
Sample.Probability.Model	Sample Probability Model
UG Student Probability	Undergraduate prospective students

Cancel Select

- The **Name** and **Definition** fields will populate based on the Model Overview. You may edit these to describe the specific instance that you are currently creating.

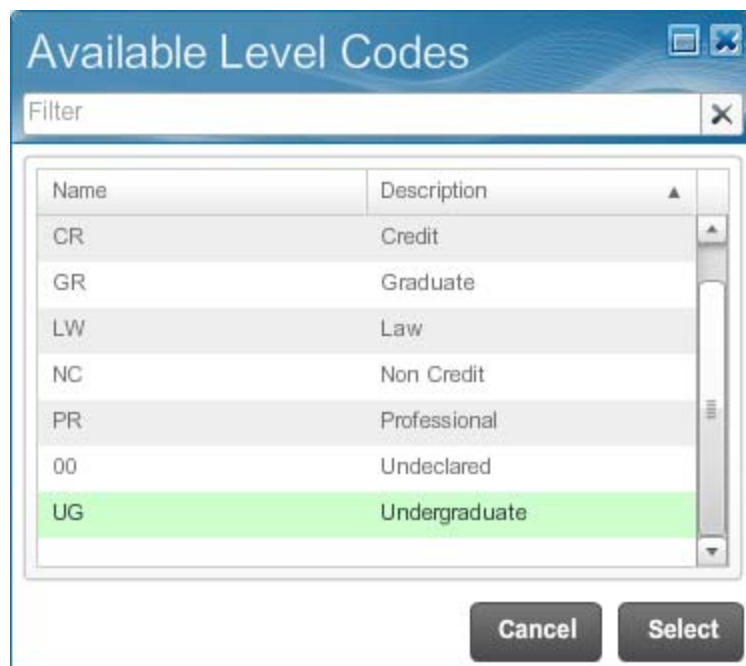
5. Click the **Look Up** (...) icon for the **Term** field to select a term for this instance.



The 'Available Term Codes' dialog box features a search bar at the top containing the text '2010'. Below the search bar is a table with two columns: 'Name' and 'Description'. The table lists several term codes, with '201110' and its description 'Fall 2010' highlighted in green. At the bottom of the dialog are two buttons: 'Cancel' and 'Select'.

Name	Description
201010	Fall 2009
201110	Fall 2010
201020	Spring 2010
201040	Summer 22010

6. Click the **Look Up** (...) icon for the **Level** field to select an academic level for this instance.




The 'Available Level Codes' dialog box has a search bar labeled 'Filter'. Below it is a table with 'Name' and 'Description' columns. The table lists various academic levels, with 'UG' and 'Undergraduate' highlighted in green. The dialog includes 'Cancel' and 'Select' buttons at the bottom.

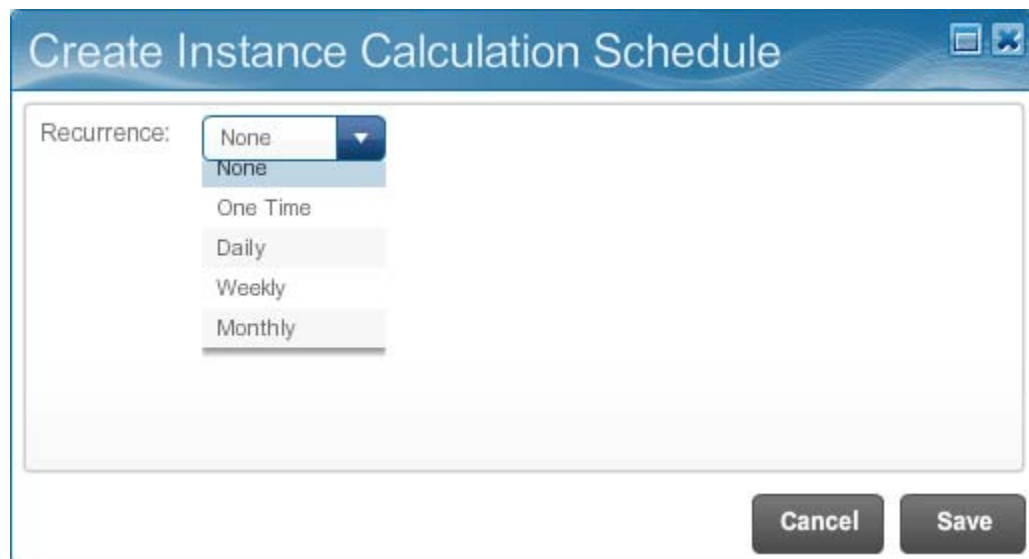
Name	Description
CR	Credit
GR	Graduate
LW	Law
NC	Non Credit
PR	Professional
00	Undeclared
UG	Undergraduate


7. Click the **Calendar** () icon for the **Begin Date** field to select a begin date for this instance.

Use the arrows to select the month and year, then double-click the desired date. The date must be equal to or later than today's date.

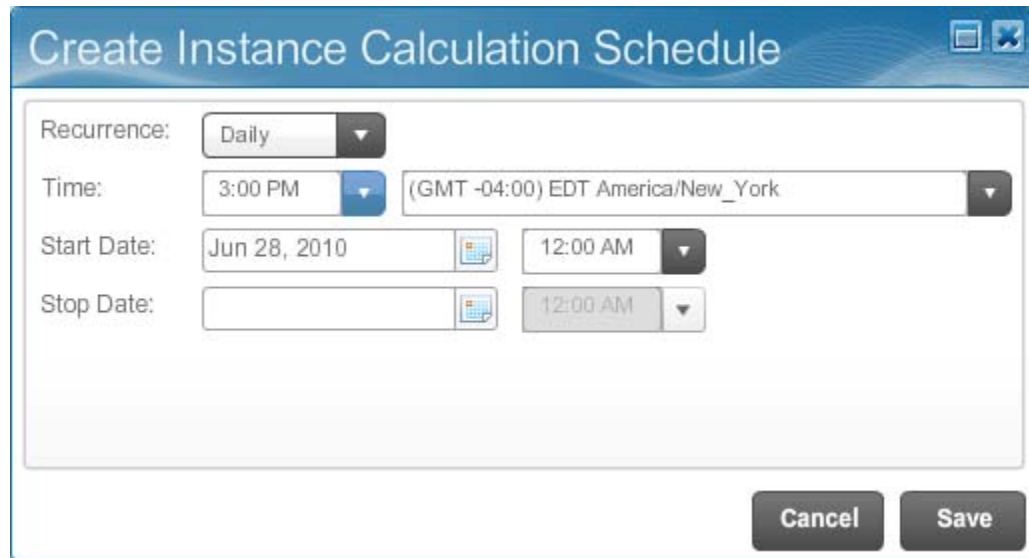


8. Click the **Calendar** () icon for the **End Date** field to select an end date for this instance, if desired.
9. In the Instance Calculation Schedule block, click the **Add Schedule** link.
10. In the **Recurrence** field, select a frequency for the instance to run.




11. The Start Date and time defaults to the current date and time. You can modify the state date and time if desired.
12. Click the **Calendar** () icon for the **Start Date** field to select a start date for this instance. This is the first date on which the instance will run.

13. Select a time for the instance to run, if desired.



The dialog box titled "Create Instance Calculation Schedule" contains the following fields and controls:

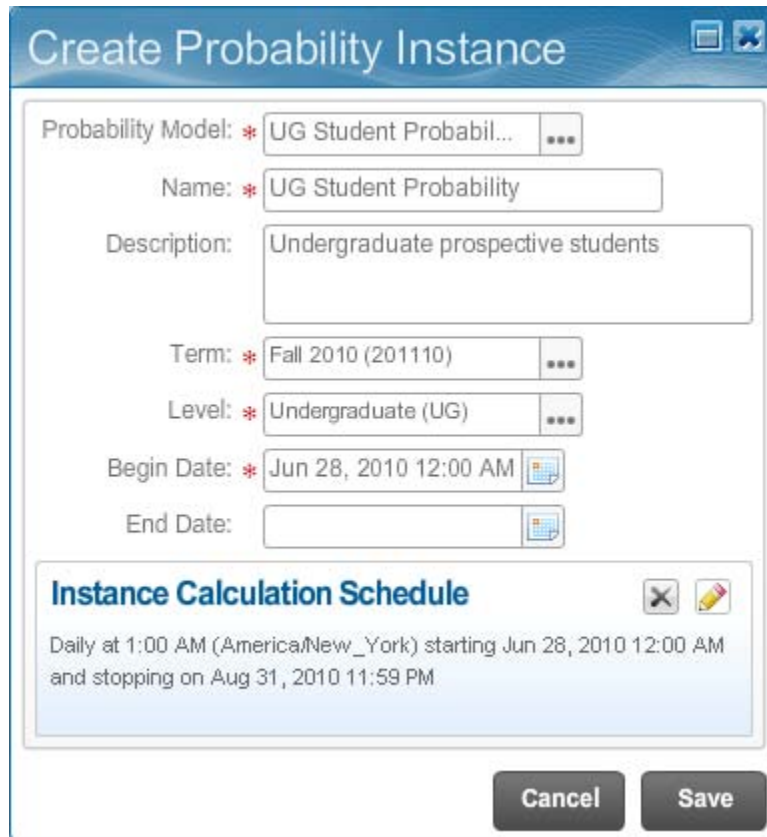
- Recurrence:** A dropdown menu set to "Daily".
- Time:** A dropdown menu set to "3:00 PM" and a time zone dropdown set to "(GMT -04:00) EDT America/New_York".
- Start Date:** A text field containing "Jun 28, 2010" with a calendar icon to its right.
- Stop Date:** An empty text field with a calendar icon to its right.
- Time Selection:** To the right of the date fields are two time dropdown menus, both set to "12:00 AM".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

14. Click the **Calendar** () icon for the **Stop Date** field to select an end date for this instance. This is the last date on which the instance will run.

Note: The instance will repeat on this frequency until a specified end date is reached.

15. Click **Save** to save your instance.

Note: If you wish to cancel this instance, click the **Cancel Instance** button



The image shows a 'Create Probability Instance' dialog box. It has a title bar with a blue gradient and two icons on the right. The main area contains several fields: 'Probability Model' with a dropdown menu showing 'UG Student Probabil...' and a three-dot icon; 'Name' with a text box containing 'UG Student Probability'; 'Description' with a text box containing 'Undergraduate prospective students'; 'Term' with a dropdown menu showing 'Fall 2010 (201110)' and a three-dot icon; 'Level' with a dropdown menu showing 'Undergraduate (UG)' and a three-dot icon; 'Begin Date' with a text box showing 'Jun 28, 2010 12:00 AM' and a calendar icon; and 'End Date' with an empty text box and a calendar icon. Below these fields is a section titled 'Instance Calculation Schedule' with a close icon and an edit icon. The text in this section reads: 'Daily at 1:00 AM (America/New_York) starting Jun 28, 2010 12:00 AM and stopping on Aug 31, 2010 11:59 PM'. At the bottom right are two buttons: 'Cancel' and 'Save'.

Create Probability Instance

Probability Model: * UG Student Probabil... ...

Name: * UG Student Probability

Description: Undergraduate prospective students

Term: * Fall 2010 (201110) ...

Level: * Undergraduate (UG) ...

Begin Date: * Jun 28, 2010 12:00 AM

End Date:

Instance Calculation Schedule

Daily at 1:00 AM (America/New_York) starting Jun 28, 2010 12:00 AM and stopping on Aug 31, 2010 11:59 PM

Cancel Save

The Instance Overview will display an overview of the selected model and the selected schedule.

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 300) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "UG Student Probability" and features an "Instance Overview" section. This section provides details about the model, including its description, term, level, status, and active status. It also lists the last successful execution date and the calculation schedule. A "Cancel Instance" button is located at the bottom right of the main content area. On the right side, a sidebar contains an "Instance Summary" section with an overview of the instance, including its description, status, and execution status. Below this is an "Instance Statistics" section showing the number of participants and scores. The footer of the interface includes copyright information and the SunGard Higher Education logo.

Instance Overview	
Model:	UG Student Probability
Description:	Undergraduate prospective students
Term:	Fall 2010 (201110)
Level:	Undergraduate (UG)
Status:	Ready
Active:	Yes
Last Successful Execution:	
Begin Date:	Jun 28, 2010 12:00 AM
End Date:	

Instance Calculation Schedule	
Daily at 1:00 AM (America/New_York) starting Jun 28, 2010 12:00 AM and stopping on Aug 31, 2010 11:59 PM	

Instance Summary	
Overview	
Description:	Undergraduate prospective students
Status:	Ready
Last Successful Execution:	
Execution Status:	Not Executed

Instance Statistics	
Number of Participants	
0	
Scores	
Average:	0.00
Maximum:	0
Minimum:	0

Editing an Existing Instance

Introduction

The components of an instance are edited in a similar manner as to how they were created. Note that Editing an Instance only changes the name of the instance. Editing the associated expressions or deleting/replacing/adding an expression in the model for the instance will not change the selection criteria or the calculation for of the existing Instance.

Steps

1. From the Ratings menu, select **Probability Instances**, then double-click the desired instance to open it.

The screenshot displays the SunGard Banner Relationship Management software interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is titled 'UG Student Probability'. On the left, there is a sidebar with 'Probability Instances' and 'Instance Overview' (which is selected). The main content area shows the 'Instance Overview' for 'UG Student Probability'. The overview includes the following details:

- Model:** UG Student Probability
- Description:** Undergraduate prospective students
- Term:** Fall 2010 (201110)
- Level:** Undergraduate (UG)
- Status:** Ready
- Active:** Yes
- Last Successful Execution:**
- Begin Date:** Jun 28, 2010 12:00 AM
- End Date:**


Below the overview, there is a section titled 'Instance Calculation Schedule' which states: 'Daily at 1:00 AM (America/New_York) starting Jun 28, 2010 12:00 AM and stopping on Aug 31, 2010 11:59 PM'. To the right of the main content area, there is a sidebar with 'Instance Summary' and 'Instance Statistics'. The 'Instance Summary' section includes an 'Overview' with the following details:

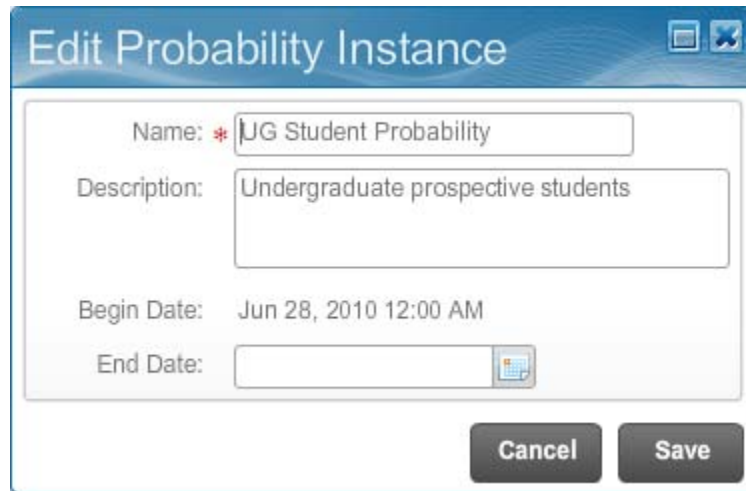
- Description:** Undergraduate prospective students
- Status:** Ready
- Last Successful Execution:**
- Execution Status:** Not Executed

Below the summary, there is a 'Calculate' button. The 'Instance Statistics' section includes a 'Number of Participants' section with a value of 0, and a 'Scores' section with the following details:

- Average:** 0.00
- Maximum:** 0
- Minimum:** 0

At the bottom of the main content area, there is a 'Cancel Instance' button. The footer of the interface includes the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 300)' and the SunGard Higher Education logo.

2. Click the **Edit** () icon next to the overview or schedule window to edit its contents.
3. Make your changes to the Overview or Schedule sections, then click **Save**.




Edit Probability Instance

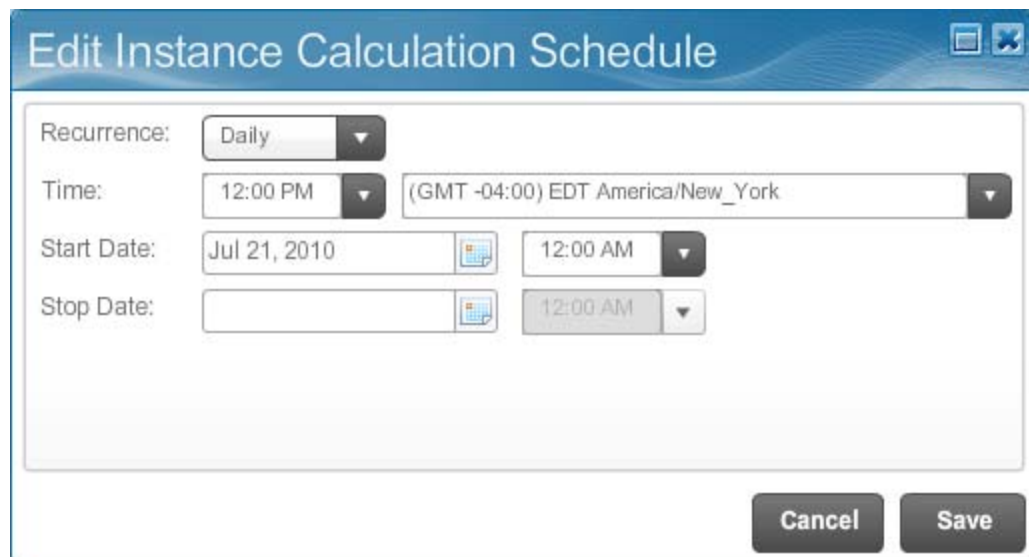
Name: *

Description:

Begin Date: Jun 28, 2010 12:00 AM

End Date: 


Cancel **Save**




Edit Instance Calculation Schedule

Recurrence:

Time:

Start Date: 

Stop Date: 

Cancel **Save**

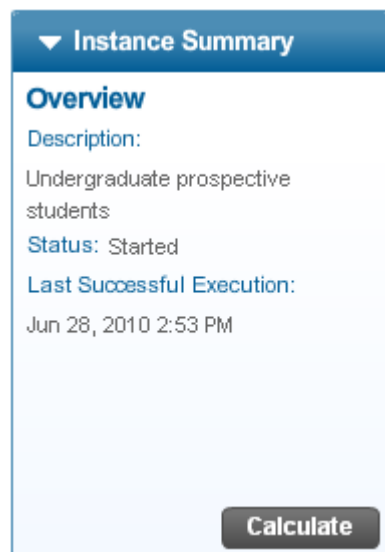
Running an Instance On Demand

Introduction

In addition to the regular schedule on which an instance runs, you may calculate results for it at any time.

Steps

1. Open your desired Probability Instance.
2. In the Instance Summary sidebar, a breakdown of the instance and its history will display.



3. Click **Calculate** to calculate results for this instance.

4. The **Instance Statistics** sidebar will display the results of the instance.



Returned data includes:

- the number of matching prospects
- the average score for each matching prospect
- the maximum score scored by any one prospect
- the minimum score scored by any matching prospect

Stopping or Suspending an Instance

Introduction

Once an instance has been executed, you can either suspend it (which will prevent it from running, but is reversible) or stop it (which will permanently disable it).

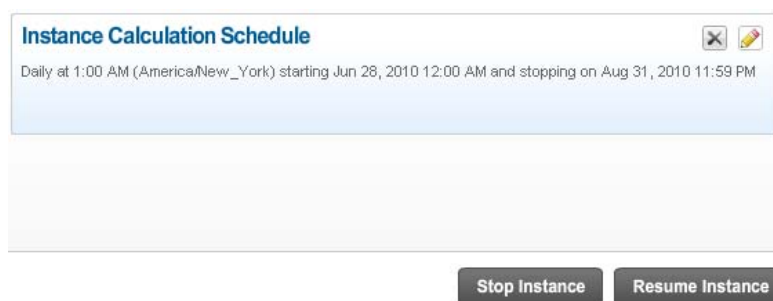
Steps

1. To suspend an instance, click the **Suspend Instance** button on the Instance Overview screen.

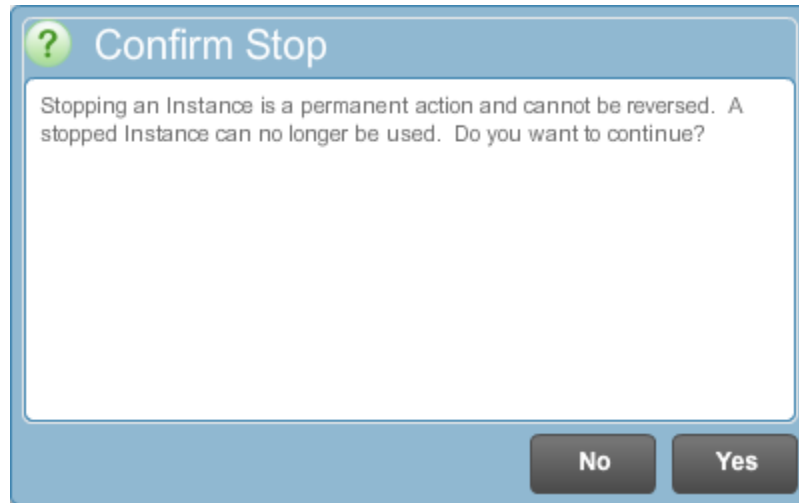
The Instance Summary sidebar will display a status of Suspended.



2. To resume this instance, click the **Resume Instance** button at the bottom of the screen. This will restore the status to Resumed and it will run as scheduled.



3. To permanently stop an instance, click the **Stop Instance** button.



You will be prompted as to whether this is what you really want to do. If you want to stop it permanently, click **Yes**.