

Banner Enrollment Management Suite Relationship Management Student Workspace Training Workbook

*Release 1.4 – August 2010
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Revision History Log

Publication Date	Summary
8/13/2010	New version that supports the Student tab of the Banner Enrollment Management 1.4 software.

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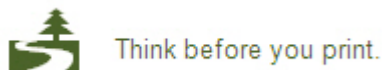


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Student Workspace



Workbook goal

The goal of this workbook is to provide you with an understanding of the features and functions of the Student workspace in Relationship Management.

Intended audience

Students Services staff.

Course objectives

After completing this course, you should understand and be able to utilize the various functions within the Student workspace.

Profile Manager

Introduction

Banner Relationship Management is the component of the Banner Enrollment Management Suite that helps you manage your relationship with prospective students, enrolled students and alumni. Whether your focus is on recruiting and admissions, student retention, or alumni engagement, the tools of Banner Relationship Management help you to target, engage, and build relationships with your constituents across the student life cycle.

The profile manager is the central location for working with prospects, students and alumni. It provides admissions office, student services, and alumni office staff with access to personal and relevant academic information about your constituents.

Each profile manager workspace is segmented based on the type of profile and is represented as a separate tab. For example:

- On the **Prospects** tab, a recruiter can create lists of prospective students for use in communications and campaigns. You can view and edit information about your constituents, such as their interests, contact information, and recruitment status.
- On the **Students** tab, an advisor can create lists of students for use in communications and campaigns designed to improve student retention.
- On the **Alumni & Friends** tab, a development officer can create lists of alumni for use in communications and campaigns to increase alumni loyalty and support.

Note: You may see one or more of these profile manager workspace tabs (Prospect, Students, or Alumni/Friends) based on your role and the features your institution is using. This training workbook will use the **Students** workspace and work with student profiles.



Finding information

The fastest way to get acquainted with Profile Manager is to begin with a student's profile and then explore the data that is displayed in all the windows for this student profile.

When you first open the **Students** tab in Banner Relationship Management, the **Search for Students** view displays. You can search by one or more of the displayed search options. The **Last Name** field is not a required field so if you only had an e-mail address, you could search by e-mail address only. Once you press the Enter key on the keyboard or click the **Go** button at the bottom of the Search for Students option, the names of all students who match the search criteria will display.

Note: For more information regarding the search and advanced search functions in Relationship Management, please refer to the Overview workbook.

Steps

1. Select the **Students** tab.

The screenshot shows the Banner Relationship Management interface. At the top, there is a navigation bar with tabs: Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is divided into three sections. On the left is a sidebar with 'Search for Students' (active), 'Population Lists', and 'Interactions'. The central section is titled 'Search for Students' and contains a form with fields for Banner ID, Last Name, First Name, and Email Address. Below these fields is a 'Select Attribute' dropdown menu. To the right of the form are 'Clear' and 'Go' buttons. Below the form, a table header is visible with columns: Last Name, First Name, Middle Name, Gender, Student Type, Level, College, Major, and Latest Registration. The table currently displays 0 rows. On the far right, there is a 'Profile Summary' section.

2. Enter a last name in the **Last Name** field and then press Enter on your keyboard to start the search.

Note: You could enter values in any of the search fields. You enter values in more than one search field, tab between the fields. You can use the **Select Attributes** drop-down arrow to select additional search fields. When you have finished entering search criteria, press Enter on your keyboard or click the **Go** button.

3. When a list of names appears, you have fast access to telephone number, mailing address and email address in the Profile Summary panel on the right side of the window. Double-click any name to access more detailed information:

The screenshot displays the SunGard Relationship Management software interface. At the top, there is a navigation bar with tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications', and 'Administration'. The 'Students' tab is currently selected. To the right of the navigation bar are links for 'Preferences' and 'Sign Out', and a 'Help' button.

The main content area is divided into two sections. On the left, there is a sidebar with 'Search for Students' and 'Interactions'. The 'Search for Students' section is active, showing a search form with fields for 'Banner ID', 'Last Name' (containing 'Beckler'), 'First Name', and 'Email Address'. There is also a 'Select Attribute' dropdown menu. Below the search form is a table displaying search results. The table has columns for 'Last Name', 'First Name', 'Middle Name', 'Gender', 'Student Type', 'Level', 'College', 'Major', and 'Latest Registr'. The first row of data shows 'Beckler', 'Shenita', 'Celesta', 'Female', 'Continuing', 'Undergraduat', 'School of Beh', 'Biology', and 'Spring 2010 ('. Below the table, it says 'Displaying 1 row.'.

On the right side of the main content area, there is a 'Profile Summary' panel for 'Shenita Celesta Von Beckler'. It displays the 'Banner Id' as 'EM304156' and lists contact information: '912-555-1212 (Mailing)', '606-555-1212 (Parent 2)', and 'stuEM304156@university.edu'. It also shows the address: '3 Country View', 'Eden, GA 31307'.

Now you can see the categories of data that are displayed.

- In the center of the screen, view the Student Overview. The navigation panes to the left contain the same headings as in the Student Overview.
- In the side panel to the right, view the Student Summary and Profile Summary for this particular student.
- In the lower left, view a list of open items.

The screenshot displays a web application interface for managing student profiles. At the top, there is a navigation bar with tabs for Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. Below this, a search bar labeled 'Search for Students' is visible. The main workspace is divided into two sections: a left navigation pane and a central content area. The navigation pane lists various categories: Student Overview (active, indicated by a blue arrow), Biographical, Curricula, Registration, Academic Performance, Advisors, Affinity Groups, Student Engagement, and Interaction. The central content area displays the profile for 'Shenita Von Beckler'. It includes a header with the student's name and a 'Profile Actions' bar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. The profile is organized into several sections: Biographical (Preferred Name: Shenita, Ethnicity: Black or African-American, Citizenship: Citizen, Gender: Female), Academic (Level: Undergraduate, Admit Type: Standard, Admit Term: Spring 2010, Program: BS in Biology, Major: Biology, Degree: Bachelor of Science, Degree Status: Sought, First Attended: Fall 1992), Affinity Groups (Cohorts: 201010 Transfer Junior; 201110 New Undergrad Freshmen, Student Attributes: Achieved Senior Standing, Completed Engineering project), Primary Advisor (Carter Dom, stuEM300005@university.edu, Type: Minor), and Student Engagement (Activities: Alumni Board Member, National Accounting Assn). At the bottom of the central area are buttons for 'Create Interaction' and 'Contact'. To the right of the main workspace is a side panel containing two summary sections: 'Student Summary' (Spring 2010 - Current Undergraduate, Active, Continuing, Freshman, In state Resident) and 'Profile Summary' (Shenita Celesta Von Beckler, Banner Id: EM304156, contact information, and address).

Navigation Pane

More information regarding a student profile is found by clicking on each option in the Navigation Pane. The blue arrow indicates the active link in the main workspace. The options under Student Overview include: Biographical, Curricula, Registration, Academic Performance, Advisors, Affinity Groups, Student Engagement, and Interaction.

Student Overview

Student Overview

The most current information for that individual will be displayed in a single, scrollable window called the **Student Overview**.

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar is a search bar labeled 'Search for Students'. The main content area is titled 'Student Overview' and features a left-hand navigation pane with links: Biographical, Curricula, Registration, Academic Performance, Advisors, Affinity Groups, Student Engagement, and Interaction. The central pane displays the profile for 'Shenita Von Beckler' with a 'Profile Actions' toolbar (New, Refresh, Open, Copy, Delete, More Actions, Close). The profile is organized into sections: 'Biographical' (Preferred Name: Shenita, Citizenship: Citizen, Ethnicity: Black or African-American, Gender: Female), 'Academic' (Level: Undergraduate, Program: BS in Biology, Admit Type: Standard, Major: Biology, Admit Term: Spring 2010, Degree: Bachelor of Science, Degree Status: Sought, First Attended: Fall 1992), 'Affinity Groups' (Cohorts: 201010 Transfer Junior; 201110 New Undergrad Freshmen, Student Attributes: Achieved Senior Standing, Completed Engineering project), 'Primary Advisor' (Carter Dom, stuEM300005@university.edu, Type: Minor), and 'Student Engagement' (Activities: Alumni Board Member; National Accounting Assn). At the bottom of the central pane are 'Create Interaction' and 'Contact' buttons. The right-hand pane contains two summary sections: 'Student Summary' with a scrollable list of terms (Spring 2010 - Current, Undergraduate, Active, Continuing, Freshman, In state Resident, Fall 1992 to Spring 2010, Undergraduate, Active) and 'Profile Summary' for 'Shenita Celesta Von Beckler' (Banner Id: EM304156, 912-555-1212 (Mailing), 606-555-1212 (Parent 2), stuEM304156@university.edu, 3 Country View, Eden, GA, 31307).

The Student Overview is read-only. To add or edit information, click on a topic in the navigation pane to go to the appropriate update window.

The Student Overview page displays a collection of information about the selected student. Student Overview data is grouped into the following categories:

- Biographical
- Curricula
- Registration
- Academic Performance
- Advisors
- Affinity Groups
- Student Engagement
- Interaction

The **Student Summary** is a quick way to view information about a student. Student summary information can include the student's level, status, student type, classification, residence and educational goal by term and level.

The **Profile Summary** is a quick way to view information about an individual. Student profile summary information includes the student's Banner ID and contact information for the student and will indicate if the student wishes his or her information to remain confidential, if any current holds exist, if the student is deceased, and if the student has an active Prospective Student Portal account.

The **Create Interaction** button on the Student Overview page allows you record an interaction between the institution and the student. The **Contact** button allows you to send an e-mail, letter or targeted announcement to the student. (These functions will be covered in more detail later in the Workbook)

Biographical Information

Profile Biographical Information includes **Bio Data** and **Contact Information** for an individual.

Bio Data Tab

Bio Data includes Nickname, Gender, Date of Birth, Age, Marital Status, Religion, Legacy, Citizenship, and Ethnicity, and New Ethnicity which are displayed on the **Bio Data** tab. You may enter or change Biographical Information.

The list of values available for Marital Status, Religion, Legacy, Citizenship, Ethnicity, New Ethnicity, Address Type, Telephone Type, and E-mail Address Type display the values that have been defined in the associated Banner validation forms. Changes made here will also update in Banner and vice versa.

The screenshot displays a web application interface for managing student profiles. The top navigation bar includes tabs for Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. A search bar and a 'Search for Students' button are on the left. The main content area shows the profile for 'Shenita Von Beckler' with two tabs: 'Bio Data' (selected) and 'Contact Information'. The 'Bio Data' tab contains a 'Details' section with the following information:

Preferred Name:	Shenita	Gender:	Female
Date of Birth:	Nov 26, 1984	Age:	25
Marital Status:	Widowed	Religion:	Buddhist
Legacy:	Aunt	Citizenship:	Citizen
Ethnicity:	Black or African-American	Race:	Black or African American
New Ethnicity:	Not Hispanic or Latino		

Below the details, it states 'Ethnicity and Race confirmed'. To the right of the profile, there is a 'Student Summary' section showing 'Spring 2010 - Current' status as Undergraduate, Active, Continuing, Freshman, and In state Resident. Below that is a 'Fall 1992 to Spring 2010' section showing Undergraduate status. A 'Profile Summary' section on the right lists the student's name, Banner ID (EM304156), and contact information: 912-555-1212 (Mailing), 606-555-1212 (Parent 2), stuEM304156@university.edu, and 3 Country View, Eden, GA 31307. At the bottom of the profile, there are buttons for 'Create Interaction' and 'Contact'.

Steps

Steps to follow to view and edit Biographical Information for a prospect:

1. Select the **Biographical** option in the left pane.
2. Click the **Edit** (✎) icon in the Details pane of the **Bio Data** tab.

This window will display when you click the **Edit** icon. You may change or add to the information that is displayed in this window.

Edit Bio (Shenita Celesta Von Beckler)

Preferred Name: Shenita

Gender: ☒ Female ☐ Male ☐ Not Available

Date of Birth: Nov 28, 1984

Marital Status: Widowed

Religion: Buddhist

Legacy: Aunt

Citizenship: Citizen

Race: Black or African American



Ethnicity: Black or African-American

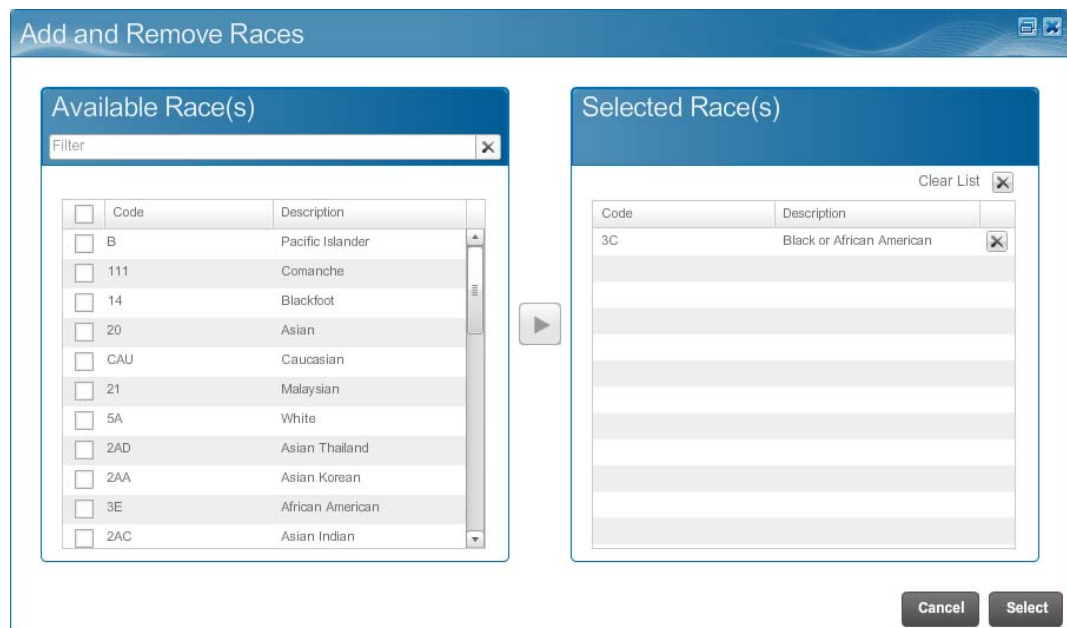
New Ethnicity: Not Hispanic or Latino

Ethnicity or Race confirmed: ☒

Cancel **Save**



3. Enter the student's preferred in the **Preferred Name** field.
4. Select the appropriate radio button for **Gender**.
5. Use the calendar to enter **Date of Birth**.

6. Click the dropdown arrow  to select from a list of options available to edit the remaining fields: (These options are coming from values created in Banner)
- Marital Status
 - Religion
 - Legacy
 - Citizenship
 - Race
 - Ethnicity
 - New Ethnicity
7. Click the **Look Up**  icon in the **Race** field.
8. Select the race(s) you want to add, then click the arrow icon to move the selected item(s) to the Selected Race(s) area.



Available Race(s)	
Code	Description
<input type="checkbox"/> B	Pacific Islander
<input type="checkbox"/> 111	Comanche
<input type="checkbox"/> 14	Blackfoot
<input type="checkbox"/> 20	Asian
<input type="checkbox"/> CAU	Caucasian
<input type="checkbox"/> 21	Malaysian
<input type="checkbox"/> 5A	White
<input type="checkbox"/> 2AD	Asian Thailand
<input type="checkbox"/> 2AA	Asian Korean
<input type="checkbox"/> 3E	African American
<input type="checkbox"/> 2AC	Asian Indian

Selected Race(s)	
Code	Description
3C	Black or African American

9. If desired, select an existing race and click the delete icon () to remove it.
10. Click  to add the selected race(s) to the profile.
11. Click the **Save** button.

Contact Information Tab

Contact Information includes the Address, Telephone, E-mail, and Instant Message details for communicating with an individual. You can add, update, and delete this data.

If you get an unspecified database violation error when attempting to update any contact information, it means that another person is also updating contact information for this individual at the same time. Do not click Refresh on the toolbar. Simply click OK in the error message box and then press CANCEL in the edit window. Click close and re-open the Student Overview window. Go to the Biographical page, Contact Information tab, and you will see the edits made by the other user.

Note: You cannot update the Address **type** field for an existing address. You may edit an existing address and add a new address or multiple addresses at the same time. Only active address types in Banner display in the profile. Telephone numbers and email addresses that are designated "Primary" will display "Primary" following the item.

The screenshot shows a web application interface for managing student information. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Shenita Von Beckler" and has two sub-tabs: Bio Data and Contact Information. The Contact Information tab is active, showing details for Address, Telephone, E-Mail, and Instant Message. The Address section lists mailing and permanent addresses for both the student and Parent 2. The Telephone section shows mailing and parent phone numbers. The E-Mail section shows business and permanent email addresses. The Instant Message section is currently empty. On the right side, there is a "Student Summary" panel showing the student's current status (Undergraduate, Active) and a "Profile Summary" panel showing the student's name, banner ID, and contact details. At the bottom right, there are buttons for "Create Interaction" and "Contact".

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out

Search for Students

Student Overview

Biographical

Curricula

Registration

Academic Performance

Advisors

Affinity Groups

Student Engagement

Interaction

Profile Actions New Refresh Open Copy Delete More Actions Close

Shenita Von Beckler

Bio Data Contact Information

Address

Mailing: 3 Country View Eden, GA 31307 (Effective Feb 23, 2010 to Jan 01, 2099)

Parent 2: 56 Sunrise Ave Ashcamp, KY 41512 (Effective Feb 23, 2010 to Jan 01, 2099)

Permanent: 123 Elm Street Malvern, PA 19355 (Effective Jul 01, 2010)

Telephone

Mailing: 912-555-1212 (Primary)

Parent 2: 606-555-1212 (Primary)

[] denotes International Access number

E-Mail

Business: stuEM304156@university.edu (Primary)

Permanent: stuEM304156@university.edu (Primary)

Instant Message

Create Interaction Contact

Student Summary

Spring 2010 - Current

Undergraduate

Active

Continuing

Freshman

In state Resident

Fall 1992 to Spring 2010

Undergraduate

Active

Profile Summary

Shenita Celesta Von Beckler

Banner Id: EM304156

912-555-1212 (Mailing)

606-555-1212 (Parent 2)

stuEM304156@university.edu

3 Country View Eden, GA 31307

Add or Edit Contact Information

1. Select the Contact Information tab.

Shenita Von Beckler

Bio Data**Contact Information**

Address

Mailing: 3 Country View
Eden, GA 31307
(Effective Feb 23, 2010 to Jan 01, 2099)

Parent 2: 56 Sunrise Ave
Ashcamp, KY 41512
(Effective Feb 23, 2010 to Jan 01, 2099)

Permanent: 123 Elm Street
Malvern, PA 19355
(Effective Jul 01, 2010)

Telephone

Mailing: 912-555-1212 (Primary)

Parent 2: 606-555-1212 (Primary)


[] denotes International Access number

E-Mail

Business: stuEM304156@university.edu (Primary)

Permanent: stuEM304156@university.edu (Primary)







Instant Message

- Click the Edit  icon in the Address pane to open the **Edit Address** window.

Edit Address (Shenita Celesta Von Beckler)

Type	Address	Effective From	Effective To
Mailing	3 Country View Eden, GA 31307	Feb 23, 2010	Jan 01, 2099
Parent 2	56 Sunrise Ave Ashcamp, KY 41512	Feb 23, 2010	Jan 01, 2099
Permanent	123 Elm Street Malvern, PA 19355	Jul 01, 2010	

Buttons at bottom: Cancel, Add Address, Save.

-  To add an address, click the **Add Address** button.
-  To edit an address, move the mouse over the address to highlight, and then click on the address. This opens the editing window.
-  To delete an address, click the **Delete** icon. .
-  If you delete in error, click the **Cancel** button.
-  Use the **Save** button to save any changes.
- After selecting either **Add Address** or clicking on the address itself, the editing window opens.

Edit Address (Shenita Celesta Von Beckler)

Add Address

Type: *
House Number:

Street Line 1:
Street Line 2:
Street Line 3:

Street Line 4:
City: *
State:
Zip/Postal Co...

County:
Nation:

Effective From:
Effective To:

Cancel
Complete

Type	Address	Effective From	Effective To	
Mailing	3 Country View Eden, GA 31307	Feb 23, 2010	Jan 01, 2099	✕
Parent 2	56 Sunrise Ave Ashcamp, KY 41512	Feb 23, 2010	Jan 01, 2099	✕
Permanent	123 Elm Street Malvern, PA 19355	Jul 01, 2010		✕


Cancel
Add Address
Save

This window is divided into two parts. The top portion of the window is the editing window. The bottom portion is the view.

Use the editing buttons to save/complete or cancel while working in the edit window.

Cancel
Complete

Add an Address

1. Click the **Add Address** button at the bottom of the window.
2. Enter address information in the **Type**, **Street Line1**, **City**, **State**, **Zip/Postal Code** and **Nation** fields. Any fields marked with a red asterisk * are required fields.
3. You may also enter **Effective From:** and **Effective To:** dates as needed. These fields restrict the valid time periods for the address, which is useful for temporary addresses such as summer addresses.
4. Note: You cannot edit the **Type** field once you have saved the address record.
5. Click the **Complete** button.  The address shows in the lower window to indicate the change has been applied.
6. Click the **Save** button.

Edit an Address

1. Double-click on an existing address entry in the bottom half of the Edit Address screen.
2. The information will auto populate in the fields and "Update Selected Address" will indicate that you are updating an existing entry.

Update Selected Address

Type: * Mailing House Number:

Street Line 1: Street Line 2: Street Line 3:

Street Line 4:

City: * Eden State: Georgia (GA) Zip/Postal Co... * 31307

County: Nation:

Effective From: Feb 23, 2010 Effective To: Jan 01, 2099


Cancel Complete

Type	Address	Effective From	Effective To	
Mailing	3 Country View Eden, GA 31307	Feb 23, 2010	Jan 01, 2099	X
Parent 2	56 Sunrise Ave Ashcamp, KY 41512	Feb 23, 2010	Jan 01, 2099	X
Permanent	123 Elm Street Malvern, PA 19355	Jul 01, 2010		X


Cancel Add Address Save

3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an Address

1. Click the **Delete**  icon at the end of the row for the address to be deleted.
2. Click **Save** to keep the change. Click **Cancel** to abort the deletion.

Telephone Numbers

To add or edit Telephone Numbers, click the **Edit**  icon in the **Telephone** section.

Shenita Von Beckler

Bio Data **Contact Information**

Address 

Mailing: 3 Country View
Eden, GA 31307
(Effective Feb 23, 2010 to Jan 01, 2099)

Parent 2: 56 Sunrise Ave
Ashcamp, KY 41512
(Effective Feb 23, 2010 to Jan 01, 2099)

Permanent: 123 Elm Street
Malvern, PA 19355
(Effective Jul 01, 2010)

Telephone 

Mailing: 912-555-1212 (Primary)

Parent 2: 606-555-1212 (Primary)

[] denotes International Access number

E-Mail 

Business: stuEM304156@university.edu (Primary)


Permanent: stuEM304156@university.edu (Primary)

Instant Message 

This opens the Edit Telephone window.

[illegible]

The concept for adding and editing a telephone number is the same as for an address:

1. To add a telephone number, click the **Add Telephone** button.
2. To edit a telephone number, move the mouse over the telephone number to highlight, and then click on the telephone number.
3. To delete a telephone number, click the **Delete** icon. .
4. If you delete in error, click the **Cancel** button.
5. Use the **Save** button to save any changes.

After selecting either **Add Telephone** or clicking on an item in the list, the editing window opens.

Edit Telephone (Shenita Celesta Von Beckler)

Add Telephone

Telephone Type: * ☐ Primary

Country Code: Telephone Number: Extension:

International Access:

Cancel Complete

Telephone Type	Telephone Number	International Access	Primary	
Mailing	912-555-1212		Yes	X
Parent 2	606-555-1212		Yes	X

Cancel Add Telephone Save


Add a telephone number

1. Click the **Add Telephone** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button. The telephone number will show in the lower window to signify the change has been applied.
4. Click the **Save** button


Edit a phone number

1. Double-click on an existing telephone number entry in the bottom half of the Edit Telephone number screen.
2. The information will auto populate in the fields and **Update Selected Telephone** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete a Telephone Number

1. Click the **Delete**  icon at the end of the row for the telephone number to be deleted.
2. Click **Save** to keep the change. Click **Cancel** to abort the deletion.

Email Information

Click the **Edit** () icon in the E-Mail window.



The Edit E-Mail window opens.




The image shows a window titled "Edit E-Mail (Shenita Celesta Von Beckler)" with a blue header. Inside the window is a table with three columns: "Type", "E-Mail Address", and "Primary". The table has two rows: "Business" and "Permanent", both with the email address "stuEM304156@university.edu" and "Yes" in the Primary column. Below the table is a checkbox labeled "Opt out from mass e-mail". At the bottom right are three buttons: "Cancel", "Add E-Mail", and "Save".

Type	E-Mail Address	Primary
Business	stuEM304156@university.edu	Yes
Permanent	stuEM304156@university.edu	Yes

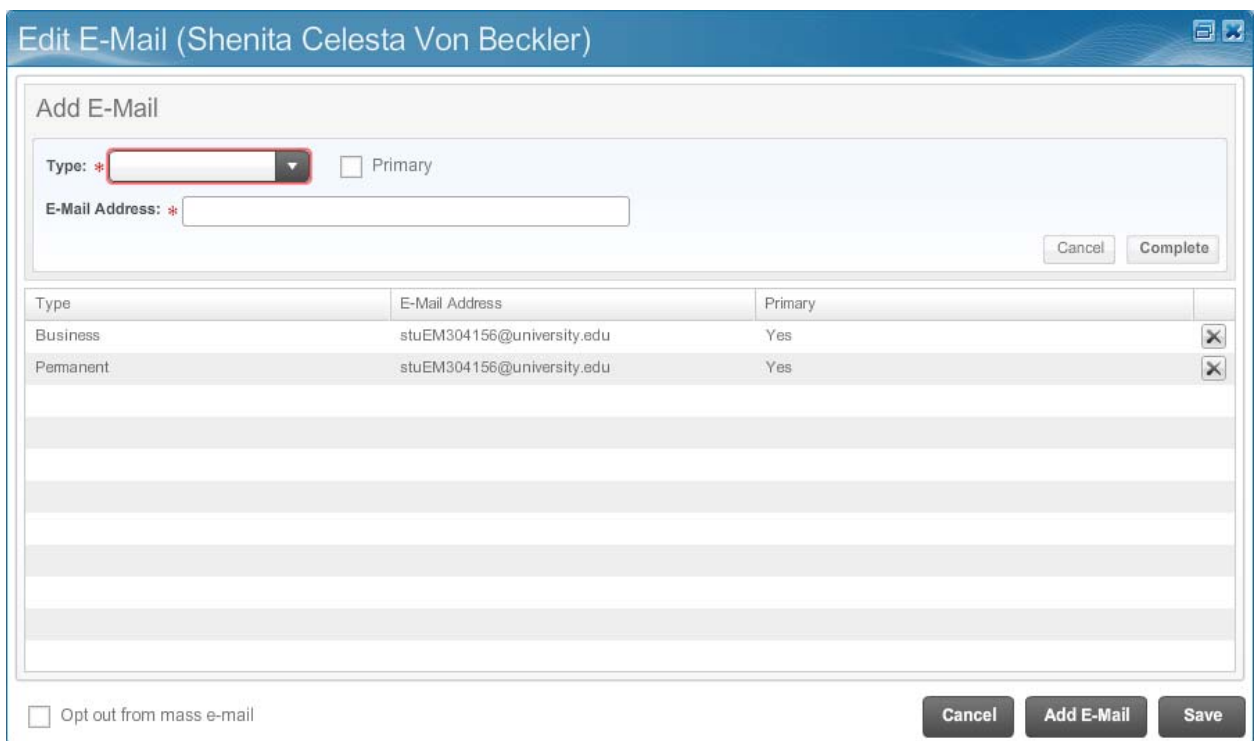
☐ Opt out from mass e-mail

Cancel Add E-Mail Save

The concept for adding and editing an e-mail is the same as for an address:

1. To add an e-mail, click the **Add E-Mail** button.
2. To edit an e-mail, move the mouse over the e-mail to highlight, and then click on the e-mail.
3. To delete an e-mail, click the **Delete** icon. .
4. If you delete in error, click the **Cancel** button.
5. Use the **Save** button to save any changes.

After selecting either **Add E-mail** or clicking on an item in the list, the editing window opens.





Edit E-Mail (Shenita Celesta Von Beckler)

Add E-Mail

Type: * ☐ Primary

E-Mail Address: *

Cancel Complete

Type	E-Mail Address	Primary	
Business	stuEM304156@university.edu	Yes	
Permanent	stuEM304156@university.edu	Yes	

☐ Opt out from mass e-mail

Cancel Add E-Mail Save


Add an E-mail

1. Click the **Add E-Mail** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button. The e-mail will show in the lower window to signify the change has been applied.
4. Click the **Save** button

Edit an E-mail

1. Double-click on an existing e-mail entry in the bottom half of the Edit E-mail screen.
2. The information will auto populate in the fields and **Update Selected E-Mail** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an E-Mail

1. Click the **Delete**  icon at the end of the row for the e-mail to be deleted.
2. Click **Save** to save the change. Click **Cancel** to cancel the deletion.

Opt out from Mass E-mail

Individuals who do not want to receive mass e-mails from the institution can indicate this preference.

The “Opt out from mass e-mail” setting is located at the bottom of the Edit E-Mail window.

☐ Opt out from mass e-mail

- To activate: Check the box and click the **Save** button.
- To deactivate: Uncheck the box and click the **Save** button.

This setting does not prevent a recruiter from sending a personalized e-mail to the person.

Instant Message Information

1. Click the **Edit** (✎) icon in the **Instant Message** section to add or edit instant messaging information.




2. The Edit Instant Message window will display.

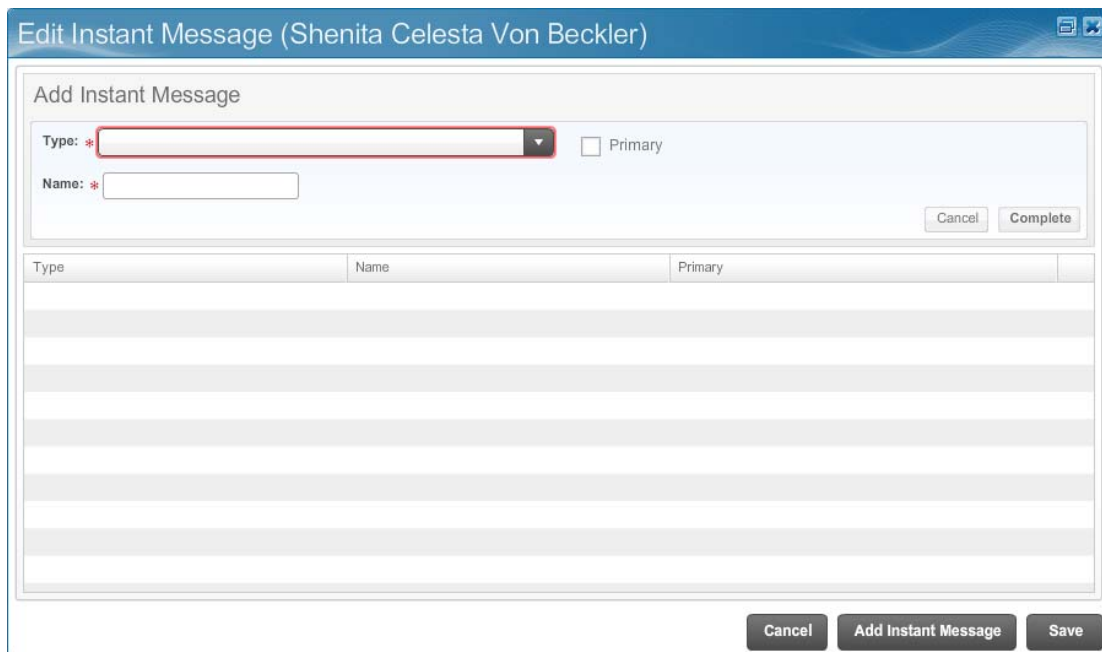
A window titled "Edit Instant Message (Shenita Celesta Von Beckler)". It contains a table with three columns: "Type", "Name", and "Primary". The table has 10 empty rows. At the bottom right, there are three buttons: "Cancel", "Add Instant Message", and "Save".

Type	Name	Primary

The concept for adding and editing an instant message is the same as for an address:

3. To add an instant message address, click the **Add Instant Message** button.
4. To edit an instant message address, move the mouse over the instant message to highlight, and then click on the instant message.
5. To delete an instant message address, click the **Delete** icon. .
6. If you delete in error, click the **Cancel** button.
7. Use the **Save** button to save any changes.

After selecting either **Add Instant Message** or clicking on an item in the list, the editing window opens.




Add an Instant Message

1. Click the **Add Instant Message** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button. The information will show in the lower window to signify the change has been applied.
4. Click the **Save** button.

Edit an Instant Message

1. Double-click on an existing instant message entry in the bottom half of the Edit Instant message screen.
2. The information will auto populate in the fields and **Update Selected Instant Message** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an Instant Message

1. Click the **Delete**  icon at the end of the row for the instant message to be deleted.
2. Click the **Save** button to keep the change. Click the **Cancel** button to cancel the deletion.

Note: In the current release of Relationship Management, Instant Message addresses may be saved but sending and receiving of Instant Messages is not currently available.

Curricula Information

Introduction

Student curricula information includes detailed information on the student's current curricula as well as information on each of the student's past curricula. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.

The screenshot displays the Banner Relationship Management interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. The left sidebar contains a search bar and a list of student-related links: Student Overview, Biographical, Curricula (highlighted), Registration, Academic Performance, Advisors, Affinity Groups, Student Engagement, and Interaction. The main content area shows the profile of Shenita Von Beckler. The 'Curricula History' section contains a table with the following data:

Current	Term	Level	Program	Major	Minor	Concentration
Yes	201020	Undergraduate	BS-BIOLOGY	Biology		
No	201020	Undergraduate	BS-BIOLOGY	Human Biology		
No	201020	Undergraduate	BS-BIOLOGY	Human Biology		
No	199209	Undergraduate	BSN	Other		

Below the table is the 'Curricula - Current' section, which displays the following information:

- Effective Term: Spring 2010 (201020)
- Degree: Bachelor of Science
- Program: BS-BIOLOGY
- Campus: Main
- End Term:
- Level: Undergraduate
- College: School of Behavioral Sciences
- Catalog Term: Spring 2010 (201020)

The 'Field(s) of Study' section shows:

- Major: Biology
- Department: Spanish

On the right side, the 'Student Summary' and 'Profile Summary' sections provide additional details about the student, including their banner ID, contact information, and address.

Steps

To view a student's curricula, perform the following steps:

1. Select the **Students** tab.
2. Search for and select a student.
3. Click the **Open** button.
4. Click the **Curricula** link.
5. Select a row in the Curricula History section to display detailed information about the selected curricula.

Registration Information

Introduction

Student registration information contains the terms that a student is enrolled, the student's enrollment status, and credit hours, as well as the courses for which the student has registered. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.

The screenshot displays the Banner Relationship Management interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. A 'Help' button is located on the right. Below the navigation bar, a search bar labeled 'Search for Students' is on the left. The main content area is titled 'Shenita Von Beckler' and includes a 'Profile Actions' menu with options like New, Refresh, Open, Copy, Delete, and More Actions. The 'Registered Courses' section shows the enrollment term as 'Spring 2010 (201020)' and the enrollment status as 'Eligible to Register'. A table lists the registered courses with columns for CRN, Course, Title, Level, Course St, Course Hc, Registerc, Grade Mo, and Repeat In. The table contains four rows of course data. On the right side, there are two summary panels: 'Student Summary' showing the current term as 'Spring 2010 - Current' and 'Fall 1992 to Spring 2010', and 'Profile Summary' showing the student's name, Banner ID, phone numbers, email, and address. At the bottom right, there are buttons for 'Create Interaction' and 'Contact'.

CRN	Course	Title	Level	Course St	Course Hc	Registerc	Grade Mo	Repeat In
10001	Education : Creativity	Undergrad	**Register	3	3	Standard L	Include	
10002	CEU Cours	CEU - Chal	Undergrad	**Register	3	3	Standard L	
10003	Art 861	CE Art	Undergrad	**Register	3	3	Standard L	
10004	Art 161	Lecture ba	Undergrad	**Register	3	3	Standard L	

Steps

Follow these steps to view student registration information.

1. Select the **Students** tab.
2. Search for and select a student.
3. Click the **Open** button.
4. Click the **Registration** link.
5. Select a term to display the courses in that term for which the student has registered.

Academic Performance Information

Introduction

Academic Performance information includes Academic Performance and Credentials information for a student. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.

Academic Performance view

Academic Performance information consists of a summary of a student's performance for each student level, as well as a student's academic performance per term and information on the credits that a student has earned per term.

The screenshot shows the Banner system interface for a student's Academic Performance. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Shenita Von Beckler' and has tabs for 'Academic Performance' and 'Credentials'. Under 'Academic Performance', there are sub-tabs for 'Summary', 'Performance By Term', and 'Credits By Term'. The 'Summary' tab is active, displaying two tables: 'Credit' and 'Undergraduate'. Both tables show GPA, Credits Attempted, Credits Passed, and Credits Earned for Institution, Transfer, and Overall. The 'Credit' table shows a GPA of 4.00, 3 credits attempted, 3 passed, and 3 earned. The 'Undergraduate' table shows a GPA of 4.00, 18 credits attempted, 18 passed, and 18 earned. On the right side, there are two summary sections: 'Student Summary' for Spring 2010 - Current and Fall 1992 to Spring 2010, and 'Profile Summary' for Shenita Celesta Von Beckler, including Banner ID, phone numbers, and email address. A left sidebar contains a search bar and a list of navigation links. At the bottom right, there are buttons for 'Create Interaction' and 'Contact'.

	GPA	Credits Attempted	Credits Passed	Credits Earned
Institution	4.00	3	3	3
Transfer				
Overall	4.00	3	3	3

	GPA	Credits Attempted	Credits Passed	Credits Earned
Institution	4.00	18	18	18
Transfer				
Overall	4.00	18	18	18

The Academic Performance page contains the following view-only fields and buttons.

- **Summary** - Academic performance summary information includes GPA, credits attempted, credits passed, and credits earned for each student level. This summary information is organized by performance at the institution, transfer performance, and overall student performance.

- **Performance by Term** - Academic performance by term information includes term, institution GPA, transfer GPA, cumulative GPA, academic standing, and dean's list information for a selected student level.

Shenita Von Beckler

Academic Performance

Credentials

Summary

Performance By Term

Credits By Term

Undergraduate

Term	Institution GPA	Transfer GPA	Cumulative GPA	Academic Standing	Dean's List
Fall 1992	4.00		4.00	Good Standing	Deans List
Spring 2010	4.00		4.00	Good Standing	Deans List

- **Credits by Term** - Credits by term displays credit information that includes total credits, institution credits, and transfer credits. This information details the term, credits attempted, credits passed, and credits earned information for a selected student level.

Shenita Von Beckler

Academic Performance

Credentials

Summary

Performance By Term

Credits By Term

AllLevels

☒ Total

☐ Institution

☐ Transfer

Term	Credits Attempted	Credits Passed	Credits Earned
Fall 1992	9	9	9
Spring 2010	12	12	12

Credentials View

In the Credentials area of the profile, the student's qualifications related to test scores, academic credentials from high school, and any prior college experience are displayed. This view helps you build a picture of the individual's academic performance and strengths. This information is view-only.

The screenshot shows a web application interface for student management. At the top, there are tabs for Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. A search bar and navigation menu are on the left. The main content area displays the profile for Shenita Von Beckler, with tabs for Academic Performance and Credentials (selected). The Credentials section is divided into three sub-sections: Test Scores, Secondary Education (High School), and Post Secondary Education (College). The Test Scores section lists four tests: GRE Psychology Subscore 2 (Score: 935, Test Date: Jan 01, 2010, Source: Test Score Tape, Received: Feb 23, 2010), GRE Sociology Subscore 1 (Score: 660, Test Date: Jan 01, 2010, Source: Test Score Tape, Received: Feb 23, 2010), SAT Mathematics (Score: 574, Test Date: Jan 01, 2010, Source: Test Score Tape, Received: Feb 23, 2010), and SAT Verbal (Score: 1001, Test Date: Jan 01, 2010, Source: Test Score Tape, Received: Feb 23, 2010). The Secondary Education (High School) section shows information for Crossroads Bible Church, including GPA (2.31), Class Rank (9/90), and Percentile (10), with Transcript Received on Jan 01, 2010, and Graduation Date on Jan 01, 2010. The Post Secondary Education (College) section shows information for Bob Jones University, with Transcript Received on Feb 23, 2010. On the right, there are two summary panels: Student Summary and Profile Summary. The Student Summary panel shows the current status (Spring 2010 - Current, Undergraduate, Active, Continuing, Freshman, In state Resident) and the previous status (Fall 1992 to Spring 2010, Undergraduate, Active, Continuing Secondary, Freshman, In state Resident). The Profile Summary panel shows the student's name (Shenita Celesta Von Beckler), Banner ID (EM304156), and contact information (912-555-1212 (Mailing), 606-555-1212 (Parent 2), stuEM304156@university.edu).

Test Name	Score	Test Date	Source	Received
GRE Psychology Subscore 2	935	Jan 01, 2010	Test Score Tape	Feb 23, 2010
GRE Sociology Subscore 1	660	Jan 01, 2010	Test Score Tape	Feb 23, 2010
SAT Mathematics	574	Jan 01, 2010	Test Score Tape	Feb 23, 2010
SAT Verbal	1001	Jan 01, 2010	Test Score Tape	Feb 23, 2010

Field	Value
Institution	Crossroads Bible Church
GPA	2.31
Class Rank	9/90
Percentile	10
Transcript Received	Jan 01, 2010
Graduation Date	Jan 01, 2010

Field	Value
Institution	Bob Jones University
Transcript Received	Feb 23, 2010

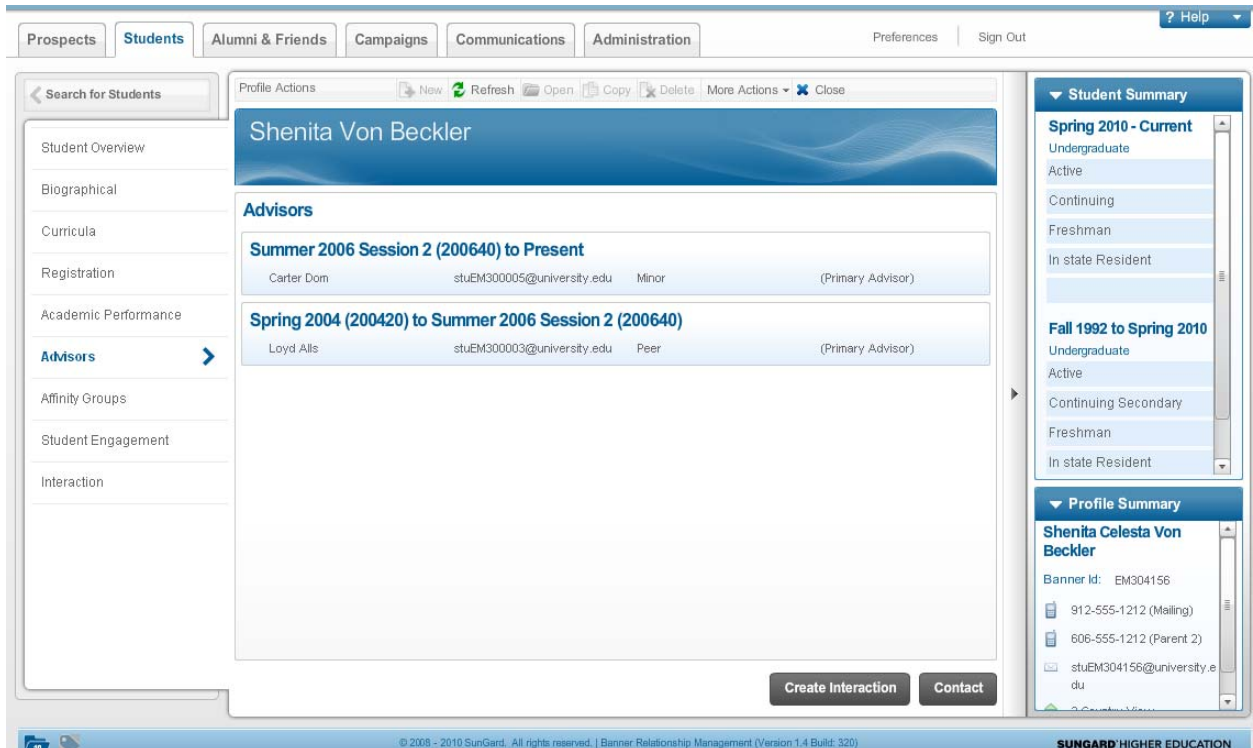
The Academic Credentials page contains the following fields:

- **Test Scores** - Information displayed in Test Scores includes test name, date received, score, and test date. The specific test scores that are displayed are controlled by institution specific configuration in the Banner Integration Configuration Settings form (GORICCR).
- **Secondary Education (High School)** - View High School information.
- **Post Secondary Education (College)** - View prior College information.

Advisors Information

Introduction

Student advisor information includes the term, advisor name, advisor e-mail address, and advisor type for each term that the student is enrolled. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.



Steps

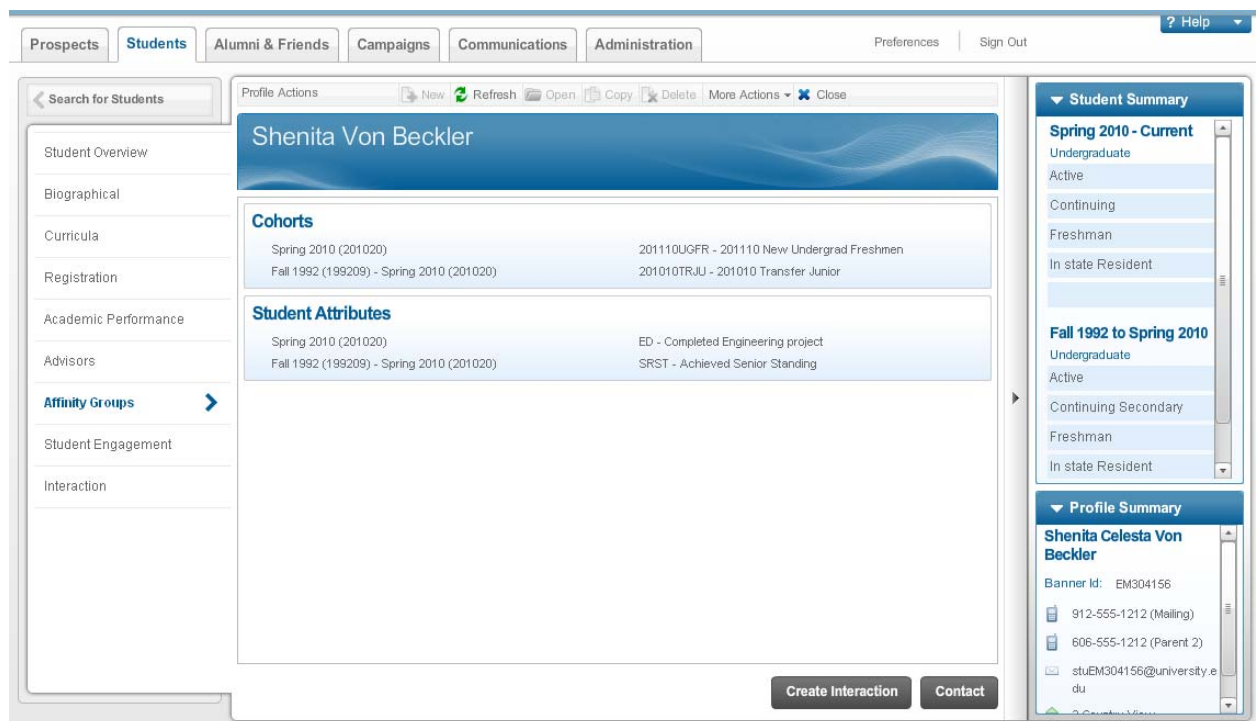
Follow these steps to view student advisor information.

1. Select the **Students** tab.
2. Search for and select a student.
3. Click the **Open** button.
4. Click the **Advisors** link.

Affinity Groups Information

Introduction

Affinity group information includes information on both cohorts and student attributes. For each cohort and student attribute, the term and affinity description is displayed. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.



Steps

Follow these steps to view student affinity groups information.

1. Select the **Students** tab.
2. Search for and select a student.
3. Click the **Open** button.
4. Click the **Affinity Groups** link.

Student Engagement Information

Introduction

The Student Engagement information in the Student Overview indicates the extracurricular activities, athletics, and interests that are known about the student. This information helps institutions to build relationships with students and target them with relevant communication campaign activities.

This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.

Activities

Activities are clubs or organized social groups in which a student is involved. This information can be used to personalize future interactions with a student.

The screenshot displays the Banner Relationship Management interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The 'Students' tab is selected. Below the navigation bar, there is a search bar and a list of student profiles. The profile for Shenita Von Beckler is selected and expanded. The profile shows the student's name, a blue header, and two engagement items: 'Alumni Board Member' (Fall 1997 (199810)) and 'National Accounting Assn' (Summer 12005 (200530)). To the right of the profile, there is a 'Student Summary' section showing the student's current status (Undergraduate, Active) and a 'Fall 1992 to Spring 2010' section showing the student's status (Undergraduate, Active). Below the summary, there is a 'Profile Summary' section showing the student's name (Shenita Celesta Von Beckler), Banner ID (EM304156), and contact information (912-555-1212 (Mailing), 606-555-1212 (Parent 2), stuEM304156@university.edu). At the bottom of the profile, there are buttons for 'Create Interaction' and 'Contact'.

Athletics

Athletics are sports in which a student is involved. This information can be used to personalize future interactions with a student. Note that you can see whether or not the student is active or inactive; if they were a recruit, a walk on, or red-shirted; and whether or not they received aid.

Shenita Von Beckler			
Activities	Athletics	Interests	
Swim Team			
Summer 12004 (200430)	Active	Walk-On	Received Aid

Interests

Interests are areas in which a student has indicated involvement or a curiosity, such as a club, sport, skill, hobby, pastime, or extra-curricular activity. This information is used to personalize future interactions with a student.

Shenita Von Beckler

Activities

Athletics

Interests

ROTC

Racial or Ethnic Organization

Radio-TV

Special Interest Groups

Vocal Music

Interactions

Introduction

An Interaction is a communication, or event, that has taken place between the institution and the student. Some Interactions are added automatically if the communication is generated from within Relationship Management. Other Interactions may be manually added by a user with appropriate permissions.

Examples of Interactions include:

- an e-mail contact from an advisor to a student sent from within Relationship Management
- a mass mailing generated from a campaign in Relationship Management
- a manual entry by a Student Services staff member concerning a telephone conversation with a student
- a manual entry by a Student Services staff member indicating that a student has attended an event such as an advising appt
- a Watch List that contains a list of students and interactions to be monitored. Watch Lists display in the upper right hand corner of the Interactions window.

Interaction Watch List

Watch List functionality is accessible from the Students tab by clicking Interactions in the navigation panel on the left of the screen.

The initial page allows for query on Interactions by Student.

- You can search based on the last name of a student.
- Advanced Search Criteria are also available for searching.

You also have the ability to set up a “Watch List”. This is a customized grouping of population lists for which the Student Services staff member can monitor any interactions that occur for student profiles in the lists within specified time frames. The Student Services staff member can quickly and easily access and view the most recent interactions related to any student profiles of interest, without having to drill down into each profile.

The full student profile is now available from the Interaction Watch List. When you query a Watch List or a list of interactions in the **Students** tab and highlights a specific interaction, a **View Profile** link is available in the **More Actions** toolbar. Selecting View Profile opens the profile overview

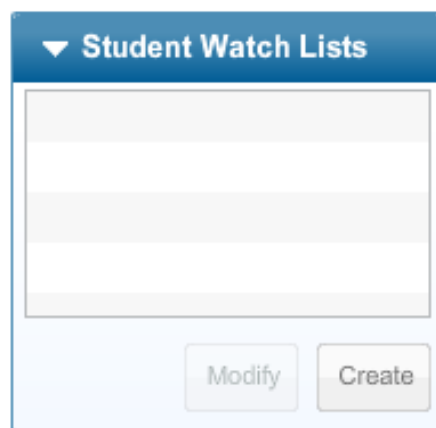
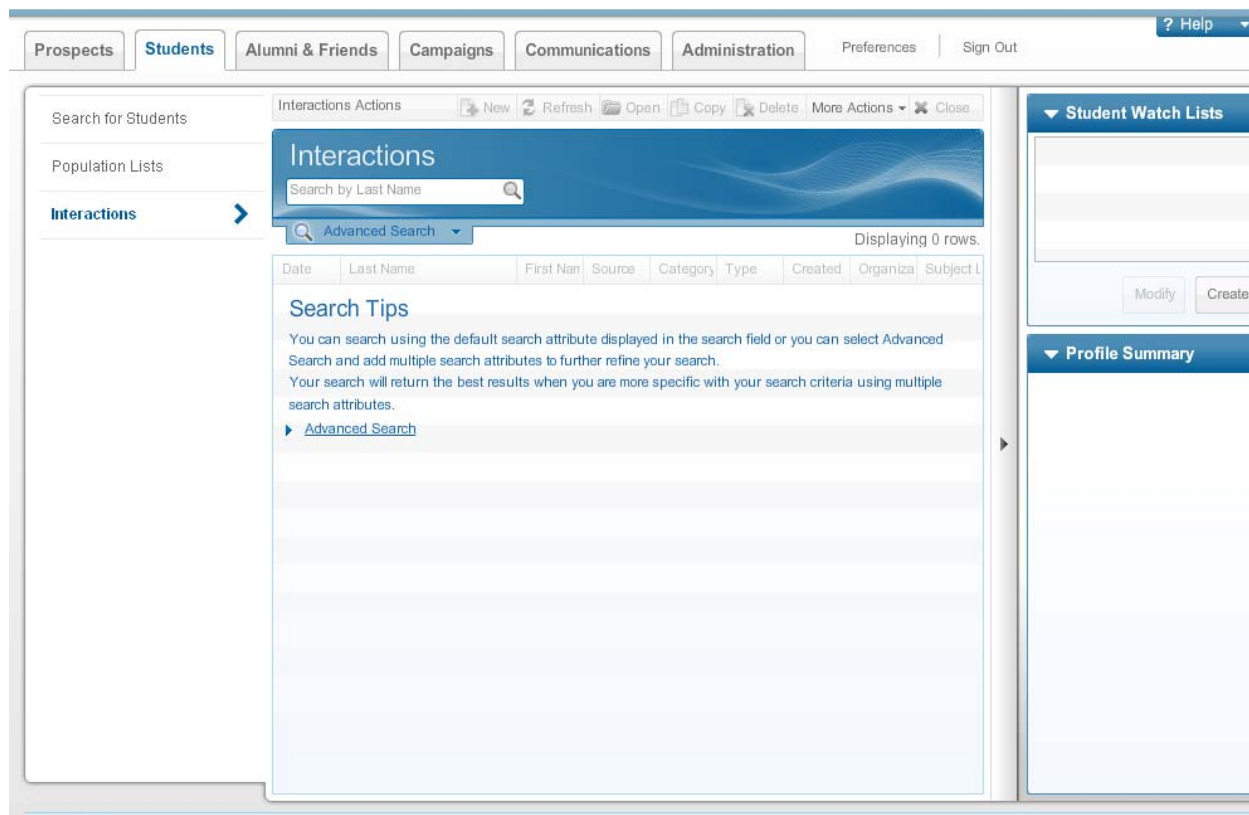
The Watch List Panel is at the upper right hand of the Interactions window. A Watch List can be created at any time while in Interactions.

Characteristics of a Watch List


- It is a personalized view for a specific user. Other users cannot view others' personal lists.
- One Watch List entry allows for one-to-many lists to be aggregated
- Users may have several Watch Lists
- Default search shows any interaction activity in the last 48 hours
- Searches can be modified to reflect changed date ranges.

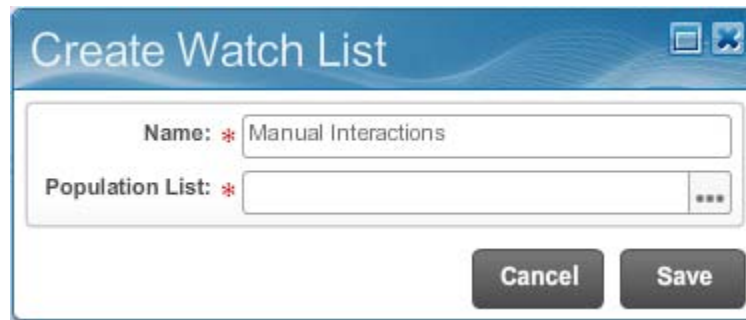
Creating a Watch List

1. Click on the **Interactions** link on the Navigation Panel of the **Students** tab. The Watch List panel is visible in the upper right hand of the screen.



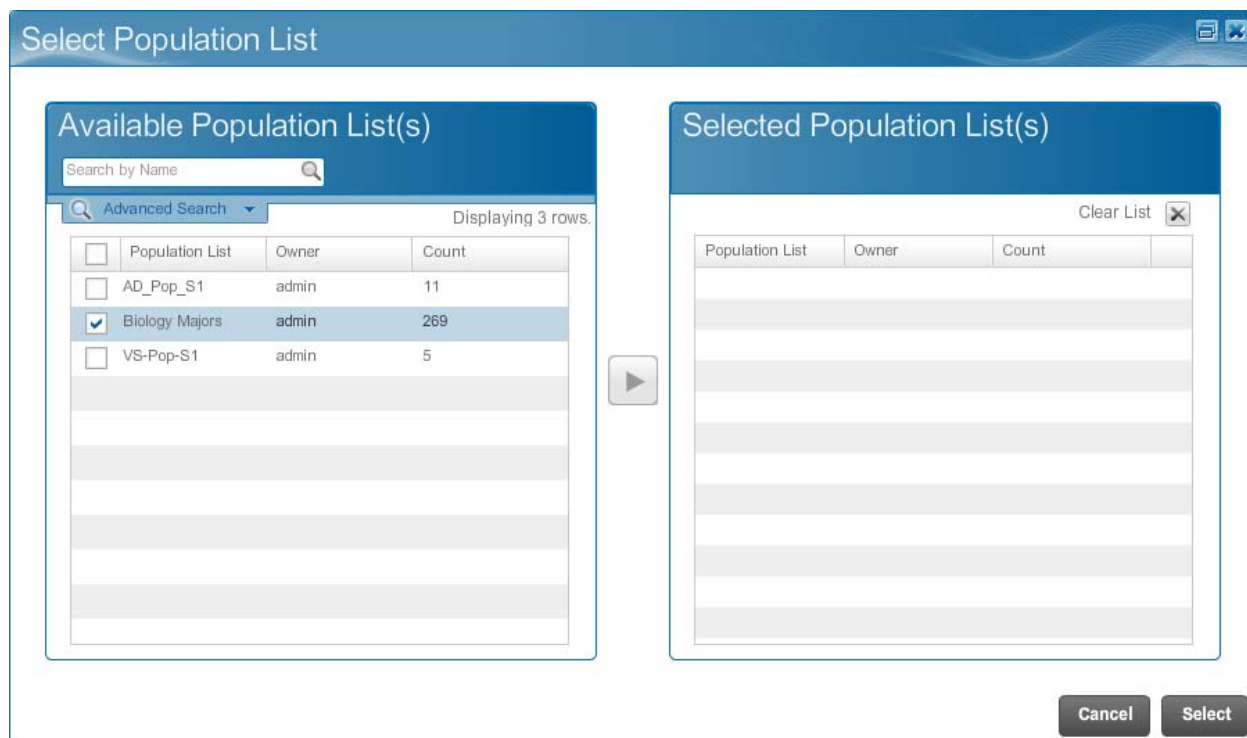
2. To create a Watch List, click the **Create** button.
3. Enter a name for the Watch List in the **Name** field.

4. Click  to select a population list. The Select Population List window will display.



The 'Create Watch List' dialog box has a blue header with the title 'Create Watch List'. It contains two input fields: 'Name: *' with the text 'Manual Interactions' and 'Population List: *' with a dropdown arrow icon. At the bottom are 'Cancel' and 'Save' buttons.

5. The Selected Population List (s) displays all available Population Lists.
6. You may search for a specific Population List by entering a name or using Advanced Search.
7. You may select one or more Population Lists to create your own watch list.



The 'Select Population List' dialog box has a blue header with the title 'Select Population List'. It is divided into two main sections: 'Available Population List(s)' on the left and 'Selected Population List(s)' on the right. The 'Available' section has a search bar, an 'Advanced Search' dropdown, and a table with columns 'Population List', 'Owner', and 'Count'. It shows three rows: 'AD_Pop_S1' (admin, 11), 'Biology Majors' (admin, 269, selected), and 'VS-Pop-S1' (admin, 5). The 'Selected' section has a 'Clear List' button and an empty table with the same columns. A right-pointing arrow is between the two sections. At the bottom are 'Cancel' and 'Select' buttons.

Population List	Owner	Count
<input type="checkbox"/> AD_Pop_S1	admin	11
<input checked="" type="checkbox"/> Biology Majors	admin	269
<input type="checkbox"/> VS-Pop-S1	admin	5

- Click the arrow between the panels to move the highlighted Population List to the Selected Population List(s) panel. You can also delete the list you created by clicking the "X" icon in the Population List panel.

Select Population List

Available Population List(s)

Search by Name

Advanced Search

Displaying 2 rows.

<input type="checkbox"/>	Population List	Owner	Count
<input type="checkbox"/>	AD_Pop_S1	admin	11
<input type="checkbox"/>	VS-Pop-S1	admin	5

Selected Population List(s)

Clear List

Population List	Owner	Count
Biology Majors	admin	269

Cancel Select

- Click **Select**, which will cause the student profiles to display in the List you have just created.

Students

Interactions Actions: New Refresh Open Copy Delete More Actions Close

Search for Students

Population Lists

Interactions

Search by Last Name

Search Descriptions: Population List(s) = Biology Majors, Interaction Date = Between Jul 12, 2010 1:14 PM and Jul 14, 2010 1:14 PM

Advanced Search

Displaying 2 rows.

Date	Last Name	First Name	Source	Category	Type	Created	Organiza	Subject L
Jul 13, 2	Parker	Penny	Manually	Manual	Face To I	admin	Root Org:	Annual C
Jul 13, 2	Parker	Penny	Commun	E-mail	Mail Sen	admin	NP1 orgs	Letter se

Student Watch Lists

Manual Interactions

Modify Create

Profile Summary

The history of all Interactions is stored and the most recent Interaction is displayed at the top of the listing in the Student Interactions window. You can search on a variety of attributes to locate or view an Interaction.


The screenshot displays the SunGard Relationship Management - Student interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Shenita Von Beckler' and features a search bar with 'Search by Created By' and an 'Advanced Search' dropdown. Below the search bar is a table with 8 columns: Date, Source, Category, Type, Created, Organization, and Subject Line. The table displays 3 rows of interaction data. On the right side, there are two summary panels: 'Student Summary' and 'Profile Summary'. The 'Student Summary' panel shows 'Spring 2010 - Current' with details like Undergraduate, Active, Continuing, Freshman, and In state Resident. The 'Profile Summary' panel shows 'Shenita Celesta Von Beckler' with Banner Id: EM304156, phone numbers, and email address. At the bottom right, there are buttons for 'Create Interaction' and 'Contact'.

Date	Source	Category	Type	Created	Organization	Subject Line
Jul 14, 2010	Manually Ente	Manual	Face To Face	admin	Advising Departm	Change major req
Feb 23, 2010	Banner	Banner	Banner Contac		Root Organization:	College Night
Feb 23, 2010	Banner	Banner	Banner Contac		Root Organization:	Merit List Letter

Search for an Interaction

1. Enter your search criteria in the **Search** field using a basic or advanced search option.
2. Click **Go** to display the results of your search.

View an Interaction

1. Double click on the Interaction you wish to view or highlight and click the open button  in the action toolbar. The text of the communication will be displayed.

Create an Interaction

1. Click the **Create Interaction** button. The **Add New Interaction** view will appear. Any fields marked with a red asterisk * are required fields.

Add New Interaction

Date: * Jul 14, 2010 at 1 : 18 PM

Organization: * Advising Department

Category: * Advisor Appointment





Type: * Face To Face

Subject: * Selecting courses for fall

Description: Student wanted advice on selecting courses for the fall in case she changes her major.

Tags
Add Tag

Cancel Save

2. Click the **Calendar** () icon in the **Date** field and select the date of the Interaction.
3. Adjust the time of the Interaction as desired.
4. Click the **Look Up** () icon in the **Organization** field and select the organization associated with the Interaction.
5. Click the **Look Up** () icon in the **Category** field and select the category of the Interaction.
6. Click the **Look Up** () icon in the **Type** field and select the type of Interaction.
7. Enter a Subject line in the **Subject** field.

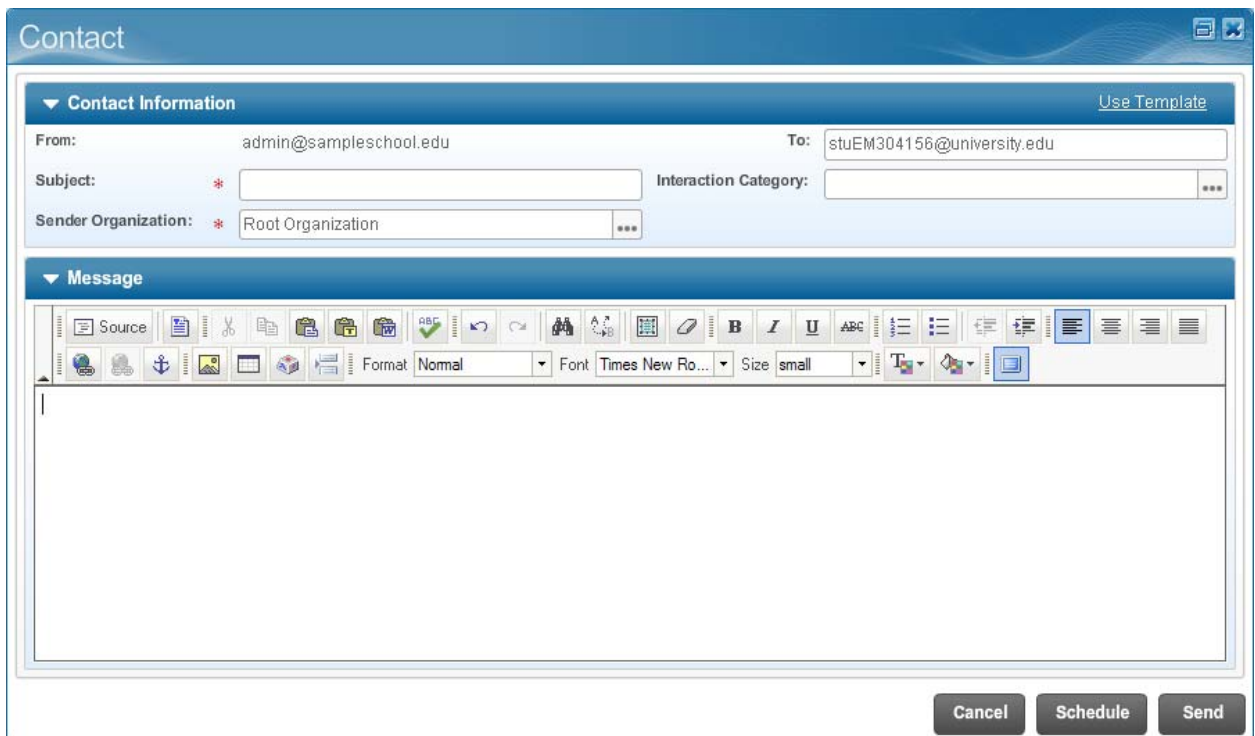
8. Enter a description of the Interaction in the **Description** field.

Note: it is possible to paste information into the **Description** field; for example, the text of an email that a student has sent to an advisor's e-mail account can be copied and pasted here.

9. Click the **Save** button.

Contact a Student

Student Services personnel can send an e-mail to a student directly from the Student Overview.



































Steps to send an e-mail to a student from the Student Overview:

1. Click the **Contact** button. The Editor Toolbar opens.
2. You can choose to use a previously defined template by clicking **Use Template** in the upper right hand corner of the pane. The defined templates are created in the Communications workspace.
3. You can create the text of your communication using the Editor as directed in the Communications Workbook.
4. The Editor Toolbar lets you enter text with a variety of formatting, including embedding of links, pictures and other files as needed.

The Editor Toolbar utilizes the power of FCK Editor, which is a lightweight text editor used in web pages. Using this tool, a user can write text or copy it from Microsoft Word, format it, create tables, and so on.

The Editor Toolbar contains formatting tools that allow you to enhance and customize the appearance of your text as shown in the following table:

The following tools are available in the Editor Toolbar

 - View/Hide HTML source	 - Change selected text format to underline
 - Select a formatting template	 - Change selected text format to strike through
 - Cut selected elements from the text	 - Insert/Remove a numbered list
 - Copy selected elements to the clipboard	 - Insert/Remove a bulleted list
 - Paste items from the clipboard into the text	 - Decrease paragraph indent
 - Paste text from the clipboard into the text	 - Increase paragraph indent
 - Paste Microsoft Word content from the clipboard into the text	 - Apply left justification to selected text
 - Spell check the text	 - Apply center justification to selected text
 - Undo changes to the text	 - Apply right justification to selected text
 - Redo changes to the text	 - Apply block justification to selected text
 - Search the text content	 - Insert an HTML link
 - Replace text content.	 - Remove an HTML link
 - Select all items in the text	 - Insert/Edit an HTML anchor
 - Remove all formatting from the selected item	 - Insert/Edit an image
 - Change selected text format to bold	 - Insert/Edit a table
 - Change selected text format to italic	 - Insert special characters

More information regarding the FCK Editor functions can be found in the Communications Workbook.

5. Click **Send** to send immediately.
6. Click **Schedule** to schedule a future date and time for the e-mail contact to be sent.

Population Lists



Population Lists

Introduction

A Population List consists of a number of students' profiles that share one or more common attributes or groups of attributes. You create a Population List to serve as the target of a campaign or communication.

Population lists are also used to create Interaction Watch Lists. A student record must exist within the Banner database to be displayed in the **Students** workspace, and be included in a Population List.

To access a list of existing Population Lists, select **Population Lists** from the **Students** tab.

The screenshot shows the 'Population Lists' interface within the 'Students' workspace. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The 'Students' tab is active. On the left, there is a sidebar with 'Population Lists' and 'Interactions'. The main content area is titled 'Population Lists' and features a search bar, a table of existing lists, and a 'Population List Actions' menu. The table displays three rows of data. On the right, there is a 'My Student Lists' panel with a search bar and a list of created lists, and a 'Population Summary' panel below it.

Name	Description	Status	Access	Owner	Creation I	List Coun	Last Calcl
VS-Pop-S1		Available	Personal	admin	Jul 13, 2011	5	
AD_Pop_S1		Available	Personal	admin	Jul 13, 2011	11	
Biology Majors	Current Biology Majors	Available	Personal	admin	Jul 14, 2011	269	Jul 14, 2011

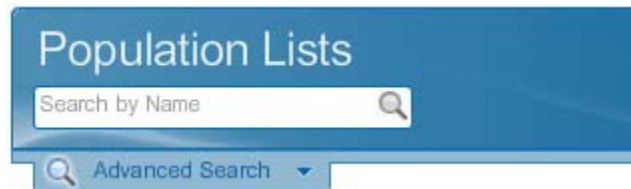
Population Lists which you have created are listed in the **My Student Lists** panel on the right side of the screen. A brief summary of a highlighted Population List appears in the **Population Summary** panel.

From this screen you can search for a Population List, create a new Population List, open a list and delete a list.

Search for a Population List


To search for a Population List, use the following procedure:

1. Enter your search criteria in the **Search** field or use the Advanced Search function.



2. Press Enter on your keyboard or click the **Go** arrow.
3. The Population Lists that meet your search criteria display in the list below.

Create a Population List

1. From the **Populations List** window, click **New**  in the action toolbar.
2. Enter a name for the new Population List in the **Name** field. This is a required field.

A screenshot of a web application form titled "Create Population List". The form has a blue header bar. Below the header, there are two text input fields: "Name:" with a red asterisk indicating it is required, and "Description:". Below these fields is a blue button labeled "Expression Options" with a right-pointing arrow. At the bottom of the form are three buttons: "Cancel", "Add Expression", and "Save".

3. Provide a short description for the new Population List in the **Description** field.
4. To add an Expression to the population list, click the **Add Expression** button. These Expressions have been created in the Administration workspace. To learn more about Expressions please refer to the Expressions Workbook.

5. Select the Expression to add to the Population List.

The screenshot shows a window titled "Add Expressions to Population List". At the top, there is a search bar labeled "Search by Name" and a dropdown menu set to "Advanced Search". Below this is a table with two columns: "Expression" and "Description". The table contains six rows of data, with the last row, "Biology Majors" and "Current Biology Majors", highlighted in green. The text "Displaying 6 rows." is visible in the top right corner of the table area. At the bottom right of the window are "Cancel" and "Save" buttons.

Expression	Description
RR3	
Rakhi's Test 2	Rakhi's Test 2 desc
RR	
RR2	
Rakhi's Test 1	Rakhi's Test 1
Biology Majors	Current Biology Majors

6. If the Expression includes parameters, select the Expression name to expose the attributes and enter the values that you require.

The screenshot shows a window titled "Create Population List". It has two text input fields: "Name:" with the value "Biology Majors" and "Description:" with the value "Undergraduate Biology Majors". Below these fields is a section titled "Expression Options" which contains a table. The table has two columns: "Expression Name" and "Parameter". The first row shows "Biology Majors" and "fr_Student Level". There is a close button (X) to the right of the table. At the bottom of the window are "Cancel", "Add Expression", and "Save" buttons.


Expression Name	Parameter
Biology Majors	fr_Student Level

7. Click **Save** to store any changes you have made.

The system automatically saved the new Population List as a **personal**. Only the list's creator can add or delete profiles from this list.

Delete a Population List


You may only delete a Population List for which you are the owner. To delete a Population List:

1. Select the list you want to delete.
2. Click **Delete**  on the Population List Actions toolbar.
3. **Confirm** the deletion.

The Population List is now deleted.

Population List Overview

Overview

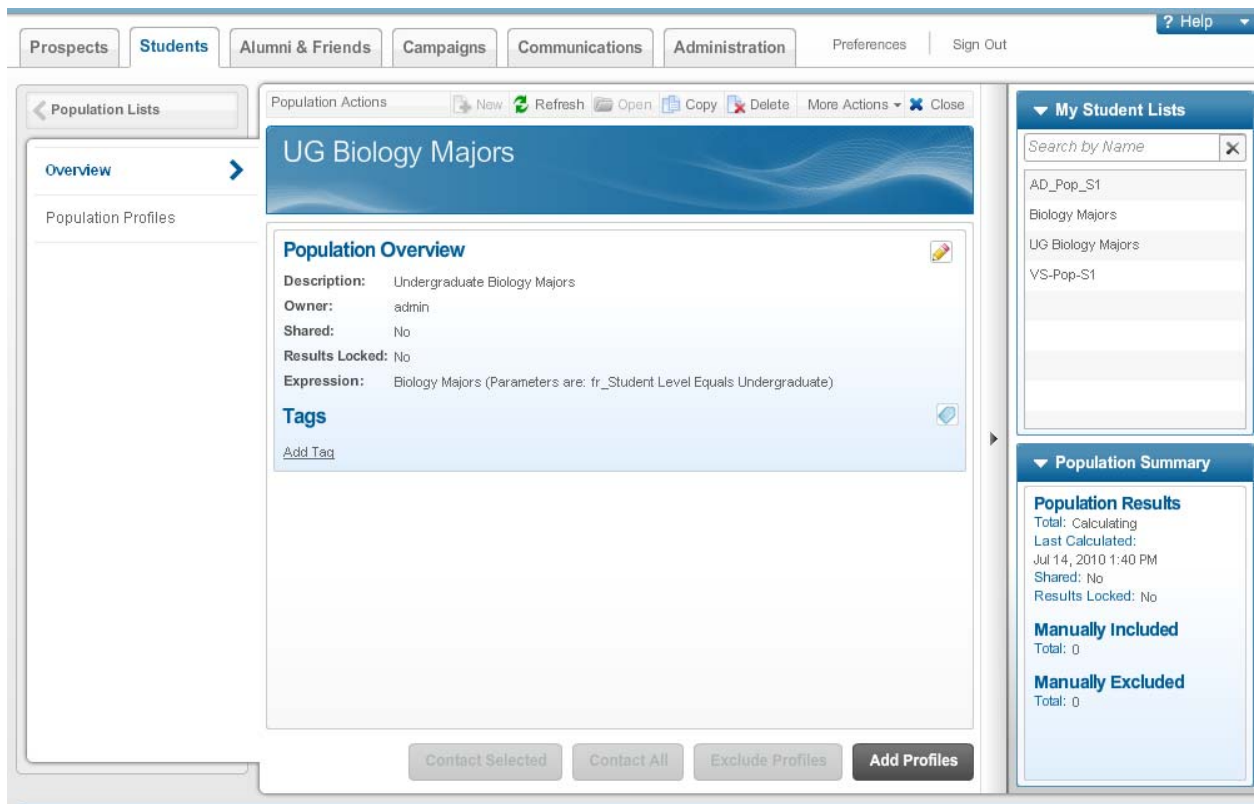
Select a Population List and click  **Open** from the toolbar or double click the entry name. This opens the Population List Overview window.

When you open an individual list from the Population Lists window, Relationship Management displays a summary or overview page containing all of the information about that particular list.

The Overview page displays the name of the list's creator, a brief description, the list's Lock status, and the Expressions and their parameters used to create the Population List.

The Population Summary in the lower sidebar displays the profiles that you added or excluded manually.

From the Overview page, you can edit all of the aspects of the list, and continue to refine the list by adding profiles. You can also send a contact to all prospects in the list using the Contact All function.



The screenshot displays the Relationship Management software interface. At the top, there is a navigation bar with tabs for Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is titled 'Population Lists' and shows an 'Overview' tab selected. The central panel displays the 'Population Overview' for the 'UG Biology Majors' list. This panel includes fields for Description (Undergraduate Biology Majors), Owner (admin), Shared (No), Results Locked (No), and Expression (Biology Majors (Parameters are: fr_Student Level Equals Undergraduate)). There is also a 'Tags' section with an 'Add Tag' link. At the bottom of this panel are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'. To the right of the main panel is a sidebar with two sections: 'My Student Lists' and 'Population Summary'. The 'My Student Lists' section has a search bar and a list of lists including AD_Pop_S1, Biology Majors, UG Biology Majors, and VS-Pop-S1. The 'Population Summary' section shows 'Population Results' with a total of 0, 'Manually Included' with a total of 0, and 'Manually Excluded' with a total of 0.

Your personal Population Lists will appear in the **My Students Lists** space in the top right panel but shared lists will not. The **Population Summary** panel gives an overview of the Population List.

It is important to note that certain menu items and button functions may or may not be available depending on the **Shared** status for the Population List.

- **Personal** - When you create a new Population List, the system automatically saves the list as a Personal list, which means that only you can add or delete profiles from it manually. Your personal lists will appear in your My Student Lists space. When you search for a Population List, the system displays all lists matching the search criteria. You can filter on "Owner" to see only your lists by using the Advanced Search function.

The system also saves the list with Results Unlocked. Anyone who can edit a list can lock or unlock it. Locking a list means it will not recalculate and you cannot manually add or exclude profiles from it. You can continue to edit the name and description of a locked list -- locking a list locks only the list results. You may choose to lock a list if you have ongoing activities with the list members, and you do not want the population to change.

Users can view other users' Personal lists, but cannot edit them. This means that they can view another user's Personal list name and description, and can open the list to see the students in the list, and can see which Expressions are used to create the list, as well as any manually included or excluded students for the list. They will not be able to edit any of that information in another user's Personal list, nor will they be able to manually add or exclude prospects.

- **Shared** - You can edit the new list to change it to a Shared list, giving all users access to the population list. Shared lists do not appear in your My Student Lists space. Once you share a list, it cannot be made personal again. Shared lists can be seen by all users, but modified only by users with specific roles/permissions.

All users can make a personal copy of a Shared list for their own purposes.

Tags

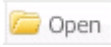

Banner Relationship Management's release 1.3 provides users the ability to associate a tag with an entity directly from the entity's Overview page. Add and Remove Tags capability is available on the Overview page for Populations, Campaigns, Templates, Interactions, and Expressions. Each Overview detail page allows you to add and remove existing tags, and add additional tags.

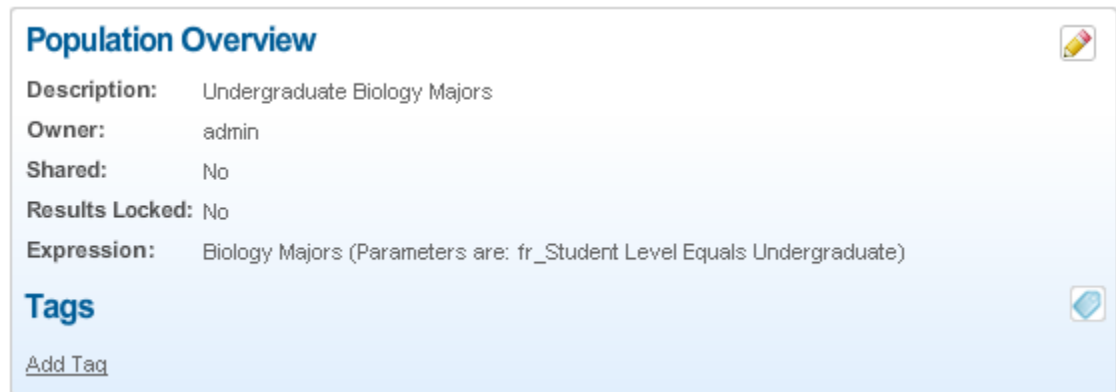
Use the **Tag** icon to open and edit the existing list of tags associated with the entity. If no tags exist, the overview displays the **Add Tag** link. Click the link or the **Tag** icon to add any available tags to the item directly from its overview page.

You can create multiple tags at once; the system adds commas to separate them as you type them in. Click the link to view the list of available tags, begin typing, and the system auto-filters tags as you type.

The screenshot displays the Banner Relationship Management interface. At the top, a navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The 'Students' tab is active. Below the navigation bar, the 'Population Lists' section is visible, with 'Overview' selected. The main content area shows the 'Population Overview' for 'UG Biology Majors'. The overview includes fields for Description (Undergraduate Biology Majors), Owner (admin), Shared (No), Results Locked (No), and Expression (Biology Majors (Parameters are: fr_Student Level Equals Undergraduate)). A 'Tags' section allows adding tags, with a text input field and a 'Close' button. Below the tags section, a list of 'Available Tags' is provided, including Alumni, Athletics, College of Arts and Science, College of Business Administration, College of Education, Current Students, Football, Friends, Law School, News, School of Medicine, Tag1, and Xdhaik9781273. The right sidebar shows 'My Student Lists' with a search bar and a list of student lists (AD_Pop_S1, Biology Majors, UG Biology Majors, VS-Pop-S1). Below this, the 'Population Summary' section displays 'Population Results' (Total: 269, Last Calculated: Jul 14, 2010 1:40 PM, Shared: No, Results Locked: No) and 'Manually Included' (Total: 0) and 'Manually Excluded' (Total: 0) counts. At the bottom of the main content area, there are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'.

Edit a Population List

1. Select a Population List and click  from the toolbar or double click the entry name. This opens the Population List Overview page.
2. In the **Population Overview** section of the page, click **Edit** 



Population Overview

Description: Undergraduate Biology Majors

Owner: admin

Shared: No

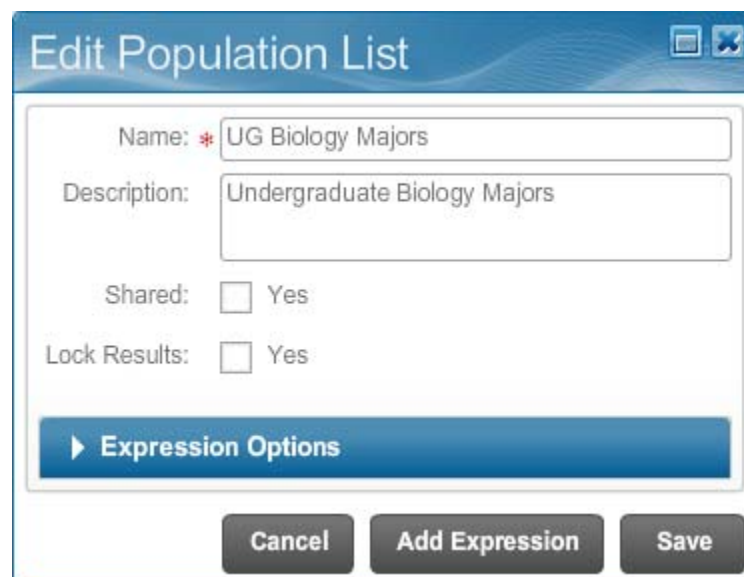
Results Locked: No

Expression: Biology Majors (Parameters are: fr_Student Level Equals Undergraduate)

Tags

[Add Tag](#)

This opens the Edit window.



Edit Population List

Name: * UG Biology Majors

Description: Undergraduate Biology Majors


Shared: ☐ Yes

Lock Results: ☐ Yes

► Expression Options

Cancel **Add Expression** **Save**

3. Edit the fields as needed:

- **Name** - Modify the name of the Population List. This is a required field.
- **Description** - Modify the description of the Population List.
- **Shared** - Select the **Shared** checkbox to allow this Population List to be shared.
- **Lock Results** - Select the **Lock Results** checkbox to freeze the Population List and prevent it from being updated.
- **Add Expression** - Click **Add Expression** to add an Expression to the Population List. If the Expression has parameters, select the parameters to display the attributes and enter the appropriate values.
To remove an Expression click  **Delete** next to the expression.

4. Click the **Save** button to store any changes you have made. Click the **Cancel** button to discard any changes you have made.

Add a profile to a list

You can add students to a list manually if they were not included in the initial Population List based on their attributes. When the manual additions become part of the list, they remain in the list even after it is rerun. If you want to later remove a student you added manually, you must remove that prospect manually as well. Manual additions are not removed as the result of the rerun of an Expression.

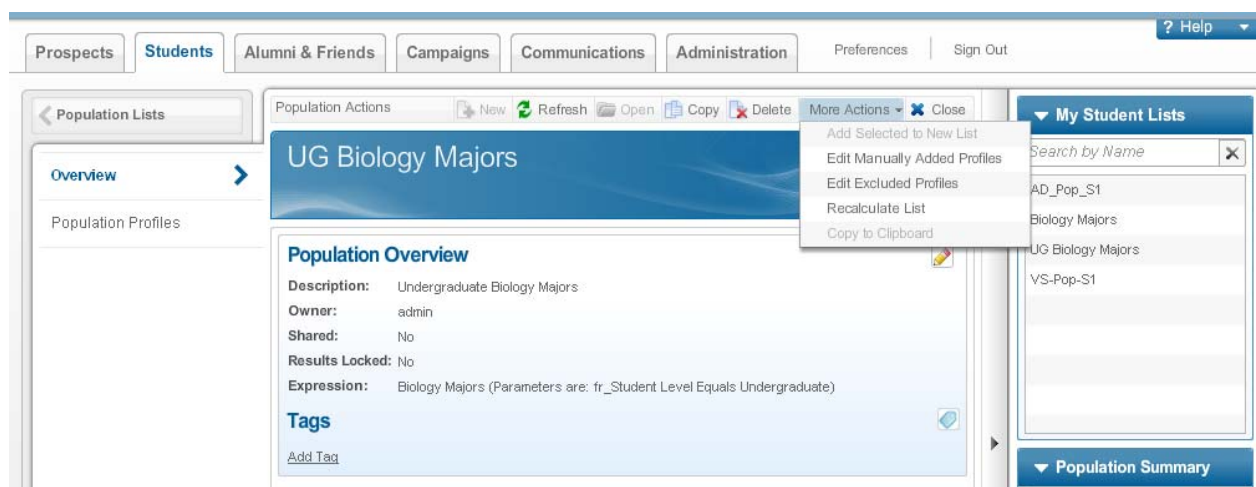
1. Click the **Add Profiles** button to search for profiles to be added to the Population List.
3. Search for and select the profiles that you would like to add.
4. Click **Add**.

Contact all students in a Population List

1. Click the **Contact All** button to send an e-mail message to all students in the list.
2. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this workbook.
3. Click the **Schedule** button to assign a specific date and time that this e-mail will be sent to the recipients or click the **Send** button to immediately send the message.

More Actions

From the **More Actions** drop down list in the **Population** Actions bar, you can choose from several additional actions to perform on the current Population List. The menu options vary depending on if the Population List is shared.



Edit Manually Added Profiles

This function allows you to edit the profiles that were manually added to the current Population List. Select the profile you wish to remove from the list and click the **Remove** button.

Edit Manual Added Profiles: UG Biology Majors

Search by Banner ID

Advanced Search

Displaying 1 row.

Last Name	First Name	Middle Nam	Gender	Student Ty	Level	College	Major	Latest Regi
Franklin	James		Male	1st Term P	Graduate	University	Accounting	middle term

Cancel Remove

Edit Excluded Profiles

This function allows you to edit the profiles that were manually excluded from the current Population List. Click **Restore Profile** to restore the excluded profile to the Population List.

Edit Manual Excluded Profiles: UG Biology Majors

Search by Banner ID

Advanced Search

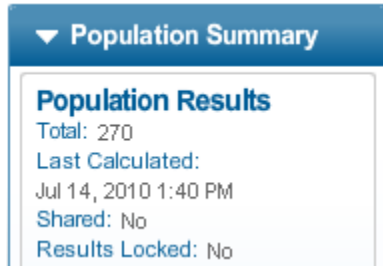
Displaying 1 row.

Last Name	First Name	Middle Nam	Gender	Student Ty	Level	College	Major	Latest Regi
Aarons	Margret	Stacy	Female	Continuing	Undergradu	Luther Colle	Biology	Spring 1995

Cancel Restore Profile

Calculate List

This option is only available for **Shared** Population Lists. Once the **Recalculate** has been selected and performed, the Population summary panel **Population Results** total will change.



Population Profiles

Population Profile

The Population Profiles page summarizes the contents of a Population List, displaying the first 2500 individuals in the list along with their data.


From this page, access the **More Actions** button on the Population Actions toolbar to add or exclude profiles and recalculate the list. Using the **Copy** function, you can copy the displayed profiles to the clipboard and export the contents to a spreadsheet. With Release 1.3 you can now include a concatenated list of all the active telephone numbers for the student in addition to other copied profile information.

The screenshot displays the SunGard Relationship Management - Student interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Population Profiles' and shows a list of students for 'UG Biology Majors'. The list has columns for Last Name, First Name, Middle Name, Gender, Student Type, Level, College, Major, and Latest Registration. The list displays 270 rows. On the right, there is a 'My Student Lists' sidebar with a search bar and a list of student lists. Below that is a 'Population Summary' section showing 'Population Results' with a total of 270, last calculated on Jul 14, 2010 1:40 PM, and 'Manually Included' and 'Manually Excluded' counts.

Last Name	First Name	Middle Name	Gender	Student Type	Level	College	Major	Latest Reg
Aarons	Margret	Stacy	Female	Continuing	Undergrad	Luther Col	Biology	Spring 199
Abner	Winter	Liliana	Female	New Grad	Undergrad	College of	Biology	Spring 200
Abrev	Sara	Felecia	Female	Special	Undergrad	Public Svc	Poetry - R	
Ahn	Lanell	Loura	Female	Continuing	Undergrad	Medicine	Biology	Summerse
Alaniz	Pedro	Charles	Male	New Secor	Undergrad	School of E	Biology	Fall 2000
Alderson	Charley	Jackie	Male	1st Time F	Undergrad	School of E	Business	
Allen	Sydney		Female	New First T	Undergrad	College of	Biology	
Allinder	Bradley	Rodrick	Male	Undeclared	Undergrad	College of	Science E	Fall 1998
Almquist	Kacie	Marianna	Female	New Grad	Undergrad	Delaware C	Poetry - R	Fall 2007
Amadeo	Rueben	Fredric	Male	Returning	Undergrad	Villanova U	French	Spring 200
Amaker	Rex	Parker	Male	Special	Undergrad	School of C	CPR	Spring 200
Aronson	Gerry	Augustine	Male	Continuing	Undergrad	School of E	Linguistics	Fall 2007
Arsenault	Walter	Wilson	Male	Adult/Com	Undergrad	Bucknell C	Physical S	Summer 20
Athans	Gail	Brice	Male	Returning	Undergrad	School of A	Art	Summer 20
Avant	Divina	Patrina	Female	Continuing	Undergrad	School of	Biology	


Add a profile to a list

You can add students to a list manually if they were not included in the Population List based on their attributes. When the manual additions become part of the list, they remain in the grouping even after it is rerun. If you want to later remove a constituent you added manually, you must remove that individual manually as well. Manual additions are not removed as the result of the rerun of an Expression.

1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button. 
3. Click the **Add Profiles** button to search for profiles to be added to the Population List.
4. Search for and select the profiles that you would like to add.
5. Click the **Add** button.


Exclude a profile from a list

You may need to exclude some profiles from a Population List. Certain constituents, for example, may require special or personalized handling, or may have been reassigned to another recruiter, or may have simply lost interest in pursuing enrollment. Follow the steps below to remove or exclude constituents from a Population List:


1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button. 
3. Select the **Population Profiles** link.
4. Select the profiles to exclude from the Population List.
5. Click the **Exclude Profiles** button to exclude unwanted profiles from the list.
6. If you are excluding profiles that were manually added to the Population List, you are asked to confirm that you want to remove the profiles.
7. Click **OK**.

Contact profiles in a population list

To contact all profiles in a Population List, follow these steps:

1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button. 
3. Click the **Contact All** button to send an e-mail message to all students in the list.
4. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this Workbook.
5. Click the **Schedule** button to assign a specific date and time that this e-mail will be sent to the recipient or click the **Send** button to immediately send the message.

To contact selected profiles in a Population List. follow these steps:

1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button. 
3. Select the **Population Profiles** link.
4. Select the profiles to contact from the Population List. To select more than one profile in the list use the shift key or the control key.
5. Click the **Contact Selected** button to send an e-mail message to specific profiles in a Population List.
6. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this workbook.
7. Click the **Schedule** button to assign a specific date and time that this e-mail will be sent to the recipient or click the **Send** button to immediately send the message

More Actions

From the **More Actions** drop down list in the **Population** Actions bar, you can choose from several additional actions to perform on the current Population List.



Add Selected to New List

This function allows you to add selected members of the current Population List to a new list by creating a new Population List. See the **Create a New Population List** section for more details.

A screenshot of a 'Create Population List' dialog box. The dialog has a blue header with the title 'Create Population List' and window control buttons. Inside the dialog, there are two input fields: 'Name: *' with a red asterisk indicating it is required, and 'Description:'. Below these fields is a blue button labeled '► Expression Options'. At the bottom of the dialog are three buttons: 'Cancel', 'Add Expression', and 'Save'.

Edit Manually Added Profiles

This function allows you to edit the profiles that were manually added to the current Population List. Select the profile you wish to remove from the list and click the **Remove** button.

Search by Banner ID

Advanced Search

Displaying 1 row.

Last Name	First Name	Middle Name	Gender	Student Type	Level	College	Major	Latest Registration
Franklin	James		Male	1st Term P	Graduate	University	Accounting	middle term

Cancel Remove

Edit Excluded Profiles

This function allows you to edit the profiles that were manually excluded from the current Population List. Click **Restore Profile** to restore the excluded profile to the Population List.

Search by Banner ID

Advanced Search

Displaying 1 row.

Last Name	First Name	Middle Name	Gender	Student Type	Level	College	Major	Latest Registration
Aarons	Margret	Stacy	Female	Continuing	Undergradu	Luther Colle	Biology	Spring 1995

Cancel Restore Profile

Recalculate List

If you click on **Recalculate List** when an Expression has been defined for your list, it will refresh the list with any new student profiles which meet the criteria of the Expression. If the list is manual with no Expression, then no recalculation will occur.

Copy to Clipboard

The **Copy to Clipboard** feature is one of several options that are available when working with Population Lists. **Copy to Clipboard** creates a .csv file of the students that can be opened in Microsoft Excel or other software program. Relationship Management will only display 2500 rows of a Population List even if the list is greater than 2500 rows. In addition, only those 2500 rows that display will be copied to the Clipboard.

To copy a list to Clipboard, use the following procedure:

1. Select the **Population Lists** link.
2. Select a Population List that is shared, or one that you created.
3. Select the **Population Profiles** link to display the Population List.
4. Select **Copy to Clipboard** from **More Actions** on the toolbar.
5. Copy the results to a spreadsheet such as Microsoft Excel®.

Appendix A – Tags



Using Tags

Description

In Relationship Management, Tags are similar in concept to keywords allowing institutions to characterize and categorize items and subsequently search for them using those tags.

Taggable items

The following types of items can have tags applied to them:

- Expressions
- Populations
- Templates
- Campaigns
- Interactions

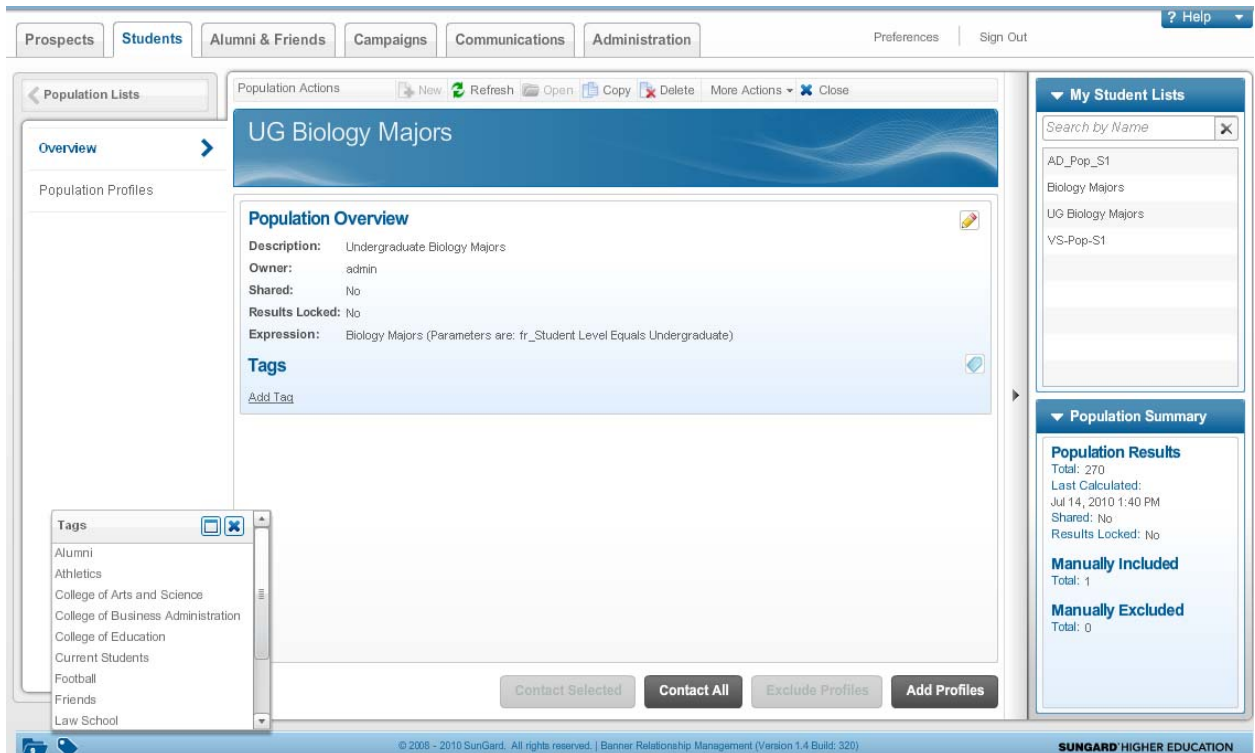
When working with expressions, tags can be incorporated into expression query criteria.

The following example will use a Student Population List, but the steps are similar for each type of item.

Applying a Tag to an Item

Introduction

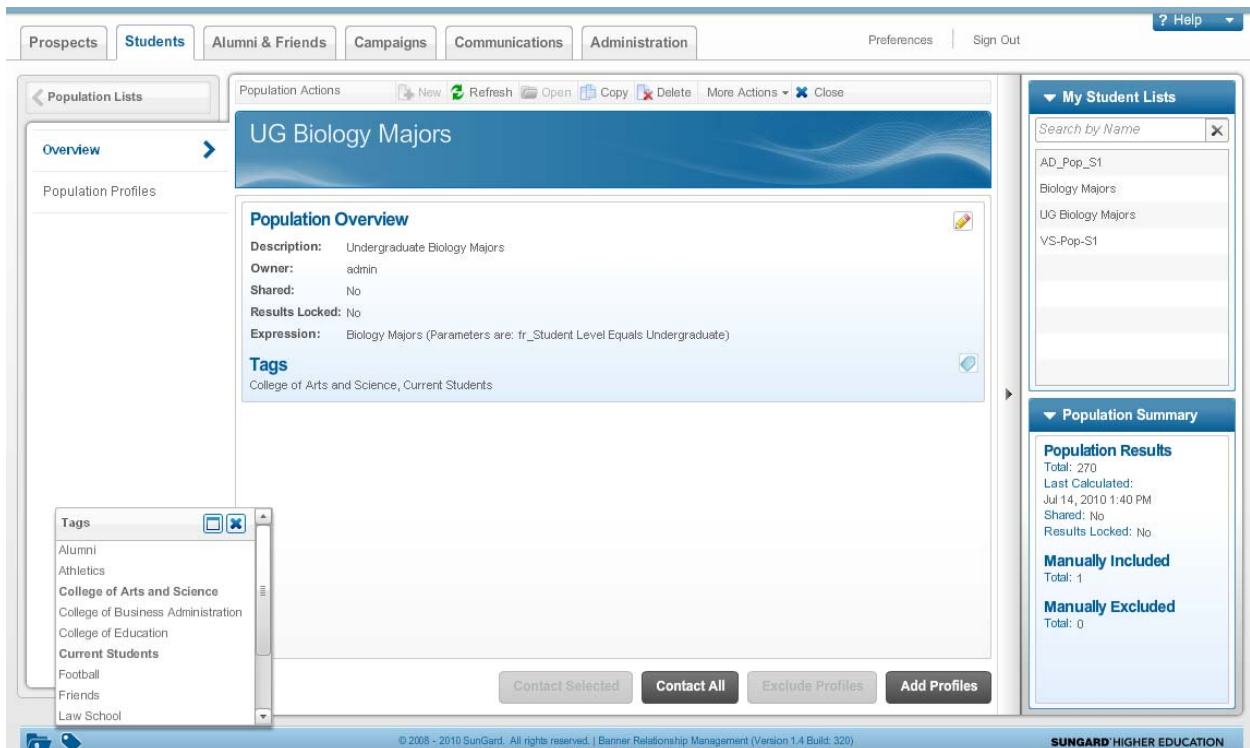
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (🔖) icon or by clicking the **Add Tags** link on an overview page.



If tags cannot be applied on the current screen, this icon will be grayed out (🔖).

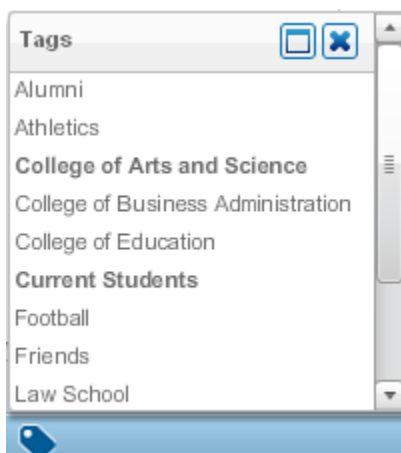
Applying tags from the Tags Display Interface

Click a tag to apply it to the current item. Applied tags will be displayed in that item's summary and will appear in the Tags Display in bold, such as **College of Arts and Science** and **Current Students** in the example below. Multiple tags can be applied to an item.



Unapplying tags

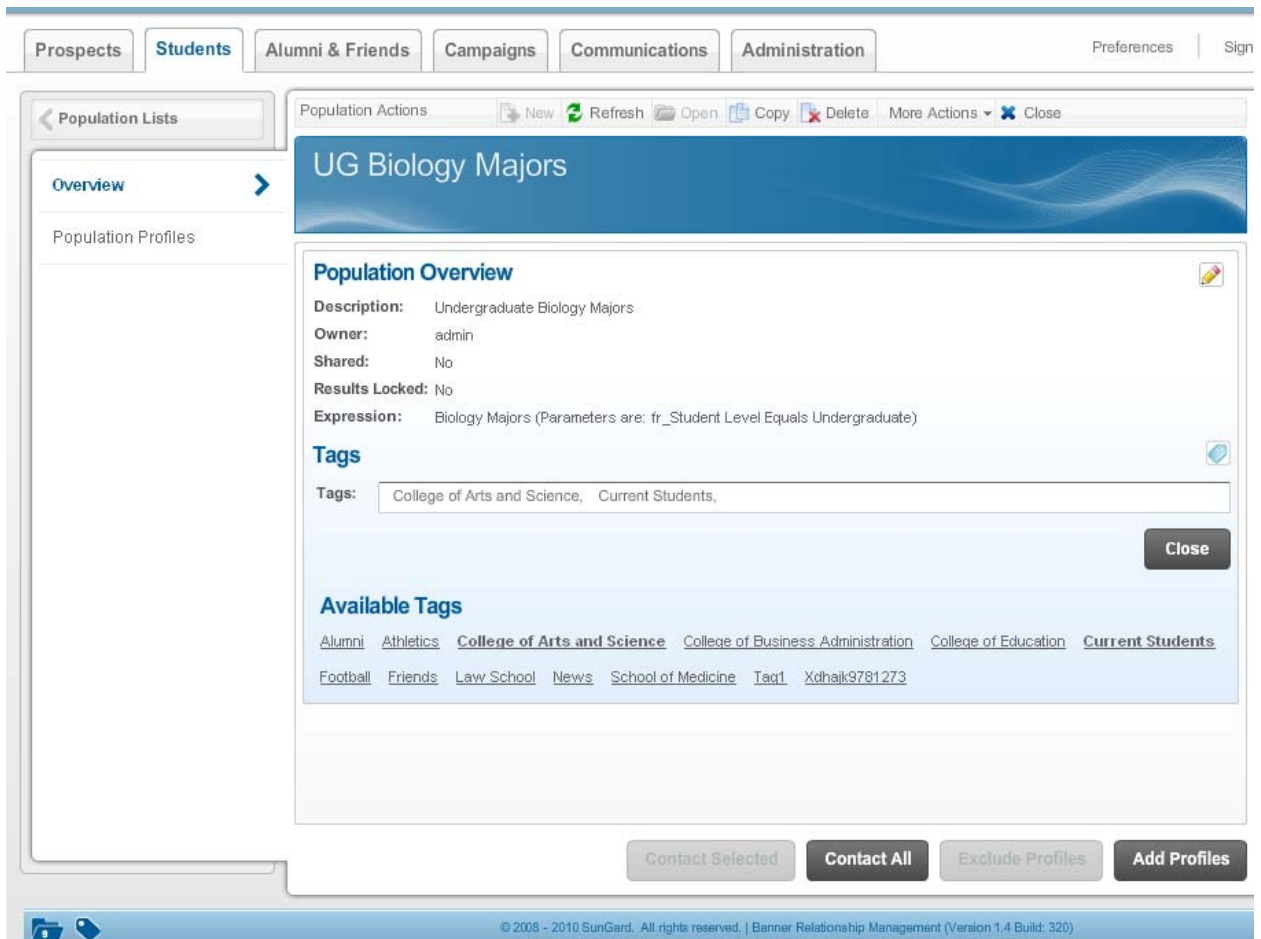
To unapply a tag, click it again. It should change from being bolded to normal case, and it will be removed from the item's summary.



Applying tags using the Available Tags link

You can also apply a tag using the **Add Tags** link on the User Interface. Use the **Tag** icon to open and edit the existing list of tags associated with the entity. If no tags exist, the overview displays the **Add Tag** link. Click the link or the **Tag** icon to add any available tags to the item directly from its overview page.

You can create multiple tags at once; the system adds commas to separate them as you type them in. Click the link to view the list of available tags, begin typing, and the system auto-filters tags as you type.



Unapplying tags

To unapply a tag, click on it in the Available Tags list. It should change from being bolded to normal case, and it will be removed from the item's summary.

View Items With A Specific Tag

Introduction

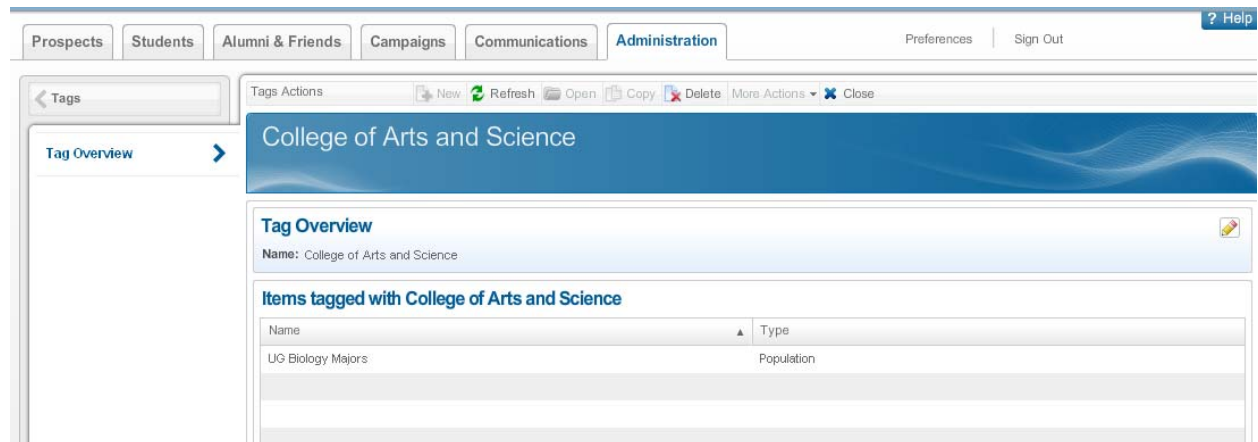
Once a tag has been applied to items in the Relationship Management system, you can use the **Tags** link on the **Administration** tab to view all items to which that tag has been applied.


The screenshot displays the Relationship Management system interface. At the top, there are tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is selected. Below the tabs, there are links for Preferences and Sign Out, and a Help icon. The main content area is titled 'Tags' and includes a search bar with the text 'Search by Name' and a magnifying glass icon. Below the search bar is an 'Advanced Search' link. A table displays 13 rows of data, showing the Name, Added By, Added Date, and Count of Associations* for various tags. The 'Tags' link in the left sidebar is highlighted with a blue arrow.

Name	Added By	Added Date	Count of Associations*
Alumni	admin	Jul 14, 2010 1:42 F	0
Athletics	admin	Jul 14, 2010 1:42 F	0
College of Arts and Science	admin	Jul 14, 2010 1:42 F	1
College of Business Administration	admin	Jul 14, 2010 1:42 F	0
College of Education	admin	Jul 14, 2010 1:42 F	0
Current Students	admin	Jul 14, 2010 1:42 F	1
Football	admin	Jul 14, 2010 1:43 F	0
Friends	admin	Jul 14, 2010 1:42 F	0
Law School	admin	Jul 14, 2010 1:41 F	0
News	admin	Jul 14, 2010 1:43 F	0
School of Medicine	admin	Jul 14, 2010 1:41 F	0

Steps

1. Click the **Tags** link on the **Administration** tab.
2. View the available tags. You may sort this list by name, creator, date of creation or count of associations by clicking the column headers.
3. Double-click a tag to open it, or click it once to select it and click **Open** on the Tags Actions toolbar.
4. All items that have been tagged with the selected tag are displayed.



5. If you wish to change the name of the tag, you can do so by clicking the **Edit** () icon in its Tag Overview block.

Search for Tagged Items

Introduction

Once tags have been applied to items in the Relationship Management system, you can use Advanced Search to search for items that contain specific tags.

Steps

1. Access a menu that contains searchable items that can be tagged. For this example, click the **Campaigns** tab.
2. Click **Advanced Search** to call up the advanced search functionality.
3. Select **Tags** from the criteria list.

Population Lists

Search by Name

Tags

Description

Name

Owner

Shared Access

Tags

Close Clear Go

Advanced Search

Displaying 4 rows.

4. Use the **Look Up** (⋮) icon to view a list of available tags.

Select Tags for Search

Available Tags

Displaying 13 rows.

<input type="checkbox"/>	Name	Added Date	Added By	Tag Count
<input checked="" type="checkbox"/>	College of Ar...	Jul 14, 2010	admin	1
<input type="checkbox"/>	College of E...	Jul 14, 2010	admin	0
<input type="checkbox"/>	Athletics	Jul 14, 2010	admin	0
<input type="checkbox"/>	Football	Jul 14, 2010	admin	0
<input type="checkbox"/>	Tag1	Jul 13, 2010	admin	1
<input type="checkbox"/>	Xdhajk9781...	Jul 13, 2010	admin	1
<input type="checkbox"/>	School of M...	Jul 14, 2010	admin	0
<input type="checkbox"/>	Law School	Jul 14, 2010	admin	0
<input type="checkbox"/>	Current Stu...	Jul 14, 2010	admin	1
<input type="checkbox"/>	Alumni	Jul 14, 2010	admin	0
<input type="checkbox"/>	Friends	Jul 14, 2010	admin	0

Selected Tags

Name	Added Date	Added By	Tag Count

5. Double-click on Available Tags entries to move them to the Selected Tags block, or click on the item to select it, then click the right arrow icon to move the tag to the Selected Tags block.
6. When the tags that you wish to search for are selected, click the **Select** button.
7. Add additional criteria to your search as desired, then click **Go**.

The items that contain your criteria will be displayed.

Population Lists

Search Descriptions: Tags = College of Arts and Science

Displaying 1 row.

Name	Description	Status	Access	Owner	Creation Da	List Count	Last Calculated
UG Biology Majors	Undergraduate Biology	Available	Personal	admin	Jul 14, 2010	270	Jul 14, 2010 1:40 PM

Appendix B – Population List Settings – More Actions



Population List Settings – More Actions

Population List rules

The success of various functions will depend on a number of factors:

- whether the owner or a user is performing the function
- whether the list is shared
- whether the list is locked

Use the following tables to determine what functions may be performed under varying combinations of these criteria.

Owner performing the function

	Not Shared, Not Locked	Not Shared, Locked	Shared, Not Locked	Shared, Locked
Add selected to new list	Y	Y	Y	Y
Edit manually added profiles	Y	Y	Y	Y
Edit excluded profiles	Y	Y	Y	Y
Recalculate list	Y	N	Y	N
Copy to clipboard	Y	Y	Y	Y

The owner is permitted to lock or unlock a Population List.

User performing the function

	Not Shared, Not Locked	Not Shared, Locked	Shared, Not Locked	Shared, Locked
Add selected to new list	N	N	N	Y
Edit manually added profiles	N	N	N	Y
Edit excluded profiles	N	N	N	Y
Recalculate list	Y	N	Y	N
Copy to clipboard	Y	Y	Y	Y

A user who is not the owner of a Population List may not unlock the list.