

Banner Enrollment Management Relationship Management Overview Workbook

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Revision History Log

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04/30/2008	New version that supports Enrollment Management Suite 1.0 software.
09/02/2008	Updated to support Relationship Management1.1 software.
4/3/2009	Updated to support Relationship Management1.2 software.
10/09/2009	Updated to support Relationship Management Release 1.3. software
08/13/2010	Updated to support Relationship Management Release 1.4 software

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Think before you print.

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Relationship Management Overview



Course goal

The goal of this workbook is to provide an overview of the Relationship Management application.

Course objectives

At the end of this training workbook you will be able to understand the basic layout and functionality of the Relationship Management application.

Intended audience

Admissions Office, Students Services, and Alumni Office staff.

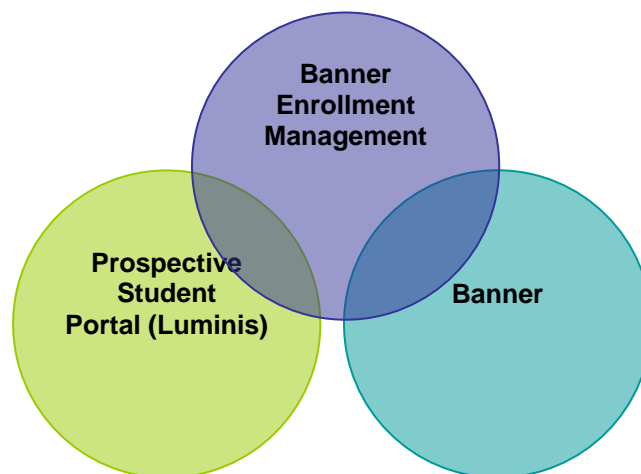
Banner Enrollment Management Overview

What is The Banner Enrollment Management Suite?

The Banner Enrollment Management suite is a web-based set of tools that enables you to manage individual and group relationships from initial inquiry through matriculation while driving performance towards institutional goals.

It extends and deepens the capabilities of existing Banner and Luminis Platforms and empowers you with information you need to:

- Connect with people and organizations more effectively
- Deliver personalized experiences and interactions that foster lifetime relationships
- Monitor and adjust your efforts in real time to impact performance
- Conduct knowledge-based planning across all recruiting, retention, and alumni programs



Banner Enrollment Management components

The Banner Enrollment Management Suite consists of the following components:

- Relationship Management
- Recruiting and Admissions Performance
- Prospective Student Portal

Relationship Management enables you to identify, engage, personalize, and track relationships with your prospective students, current students, alumni, friends of the institution and their key influencers and advisors. Capabilities include the ability to personalize engaging interactions, design, segment and target communications, and monitor, track and gauge your recruitment and admissions activities.

Recruiting and Admissions Performance is the performance management portion of the suite. It enables you to monitor and track performance against key performance indicators. Capabilities include performance scorecards, dashboards, trends, summary, and detail reports. Ad-hoc querying is easily accessed by non-technical recruitment and admissions staff members for fast, easy creation of unanticipated, on-demand queries and reports.

Prospective Student Portal is a secure website built on the Luminis Platform through which you target information to prospective students based upon their individual interests. It's your institution's interface to your prospective students.

While it is important to understand the relationship between the components within this suite, please note that each component will have separate training and workbooks. The training workbooks in this series will focus on Enrollment Management Relationship Management.

Relationship Management Overview

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.

With Banner Relationship Management you can also improve the productivity and success of your recruiting and admissions teams. You and your staff can reach out to prospects with more timely and personalized communications and actions and monitor how your prospects are responding at every stage of the relationship. Ultimately, you will make more informed decisions about your recruiting, admissions, enrollment, and alumni development programs and activities.

Banner Relationship Management contains workspaces for office staff and system administrators. The following workspaces are available as separate tabs:

- Prospects
- Students
- Alumni & Friends
- Campaigns
- Communications
- Administration

Prospects

The **Prospects** tab provides an area for recruiters to effectively track and communicate with prospective students. It provides recruiters and staff with access to personal and relevant academic information about your constituents. As a recruiter, you can create lists of prospects for use in communications and campaigns. You can view and edit information about your constituents, such as their interests, contact information, and recruitment status.

Students

After a prospect becomes a student, their profile moves from the **Prospects** tab to the **Students** tab. Advisors can create population lists and use watch lists to monitor interactions with students. Templated communications and communication campaigns can

enhance student engagement.

Alumni & Friends

Once a student graduates, their profile information moves to the **Alumni & Friends** tab where the Alumni Development office can continue to engage the person using population lists, communication templates, and communication campaigns. You can also send communications and view profile information for friends of the institution who did not attend your institution. You can create alumni & friends specific population lists in Banner Relationship Management or access population lists already created in Banner.

Campaigns

The **Campaigns** tab provides powerful tools to effectively design, initiate and track recruitment, retention and alumni campaigns. The graphical Campaign Modeler helps you design simple to complex recruiting campaigns based on specific departmental or institutional objectives. You can associate campaigns with departmental or institutional objectives, and modify campaign templates to meet changing requirements. You can monitor progress to goals easily, intervening at any point to make adjustments.

Communications

Banner Relationship Management delivers sophisticated communication services that allow you to draw on profile information to create dynamic, highly personalized e-mail and letter content based on a specific prospect's interests and needs, or based on common attributes of prospect groups. With the tools in the **Communications** tab, you can manage and bundle letters and mailing labels for printing.

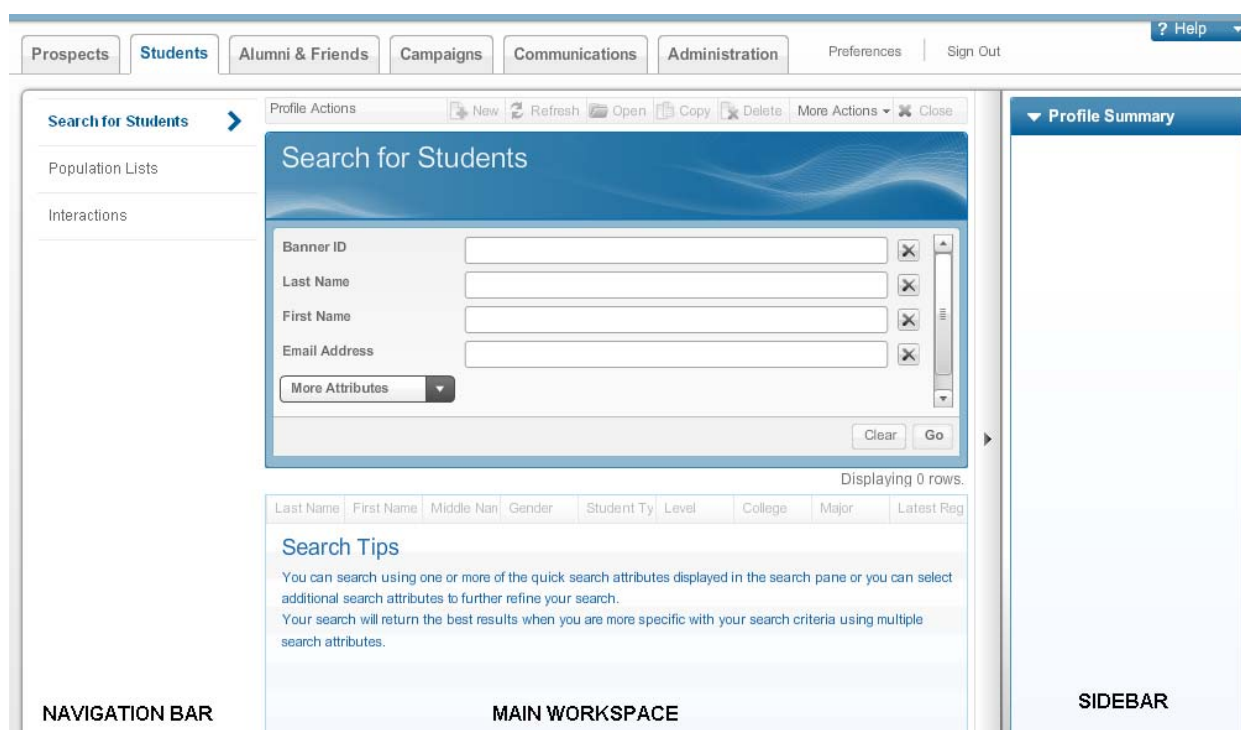
Administration

The **Administration** tab provides the workspace to manage the functions that work behind the scenes of Banner Relationship Management. Using it you define your unique requirements for the system's users, including their roles and permissions. You can create and modify the expressions that help you identify and group constituents with common attributes. You can create and manage the business rules to analyze data and perform tasks across the application. You can define institution specific values for tags that are the most meaningful to you to help you organize and search for objects such as campaigns, templates and expressions. You can define the institution specific values for interaction categories that will help you track and analyze manual interactions with your constituents. You can define the organization specific values within your institution so that the communications from each organization such as the Admissions Office or Alumni Development Office have their own unique letter-based, e-mail and reply to addresses. Finally, you can customize your probability and desirability models, as well as your admissions funnel and track progress toward your enrollment and retention goals.

User Interface and Functions

User Interface and Functions

The workspace view shows many of the features of the web-based interface. The window is divided into three main parts – the navigation pane on the left, the main workspace in the center, and the sidebar on the right.



The screen layout stays the same for each workspace but content and options vary depending on the workspace and functionality.

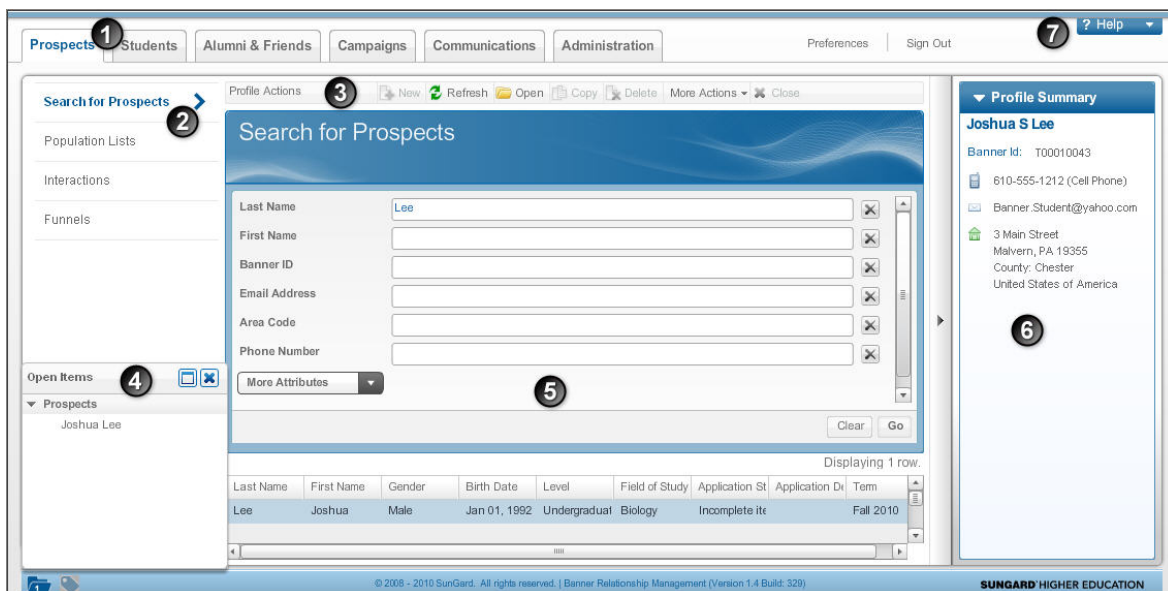
After log in, the program opens to one of the three profile manager workspaces. The profile manager is the central location for working with prospects, students and alumni. It provides admissions office, student services, and alumni office staff with access to personal and relevant academic information 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.

Please note that workspace tabs and menu options may differ based on roles and permissions assigned to a particular user. The numbers on the window below correspond to the descriptions in the table.



Number	Name	Decription
1	Workspace Tabs	allow for navigation between the workspaces.
2	Navigation panel	contains links to allow you to navigate to other areas within the workspace. For example, within the Prospects navigation panel there are links for Profile Search, Population Lists, and Funnels.

Number	Name	Decription																
3	Workspace toolbar	allows you to complete specific actions in the Enrollment Management system. The title of the toolbar reflects the currently selected application workspace and each toolbar item applies specifically to the current workspace. This toolbar is sometimes referred to as the Action toolbar .																
<table><tr><th>Tab</th><th>Description</th></tr><tr><td> New</td><td>Click  New to create a new item of the selected workspace type.</td></tr><tr><td> Refresh</td><td>Click  Refresh to display the most current data in the selected workspace.</td></tr><tr><td> Open</td><td>Click  Open to open details concerning the selected item.</td></tr><tr><td> Copy</td><td>Click  Copy to create a duplicate of the selected item.</td></tr><tr><td> Delete</td><td>Click  Delete to permanently remove the selected item.</td></tr><tr><td>More Actions</td><td>Click More Actions to select from a list of additional tasks to perform.</td></tr><tr><td> Close</td><td>Click  Close to end work on the selected item.</td></tr></table>			Tab	Description	 New	Click  New to create a new item of the selected workspace type.	 Refresh	Click  Refresh to display the most current data in the selected workspace.	 Open	Click  Open to open details concerning the selected item.	 Copy	Click  Copy to create a duplicate of the selected item.	 Delete	Click  Delete to permanently remove the selected item.	More Actions	Click More Actions to select from a list of additional tasks to perform.	 Close	Click  Close to end work on the selected item.
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More Actions	Click More Actions to select from a list of additional tasks to perform.																	
 Close	Click  Close to end work on the selected item.																	
4	Open Items panel	displays the items currently open in Relationship Management during your current session. Select any item in the Open Items panel to move to that item. Maximize  the Open Items panel using the folder icon in the page footer. The number on the folder indicates how many items are currently open.																
5	Application Workspace	space where primary tasks are performed																

Number	Name	Decription
6	Sidebar panel	displays information that supports the current application workspace. This information changes depending on the workspace. To hide the sidebar panel, click the arrow on the right edge of the main workspace.
7	Online Help	for the tasks you perform using the pages and windows of the system, and reference information for the contents of the pages and windows themselves.

Using search tools

The main tabs search functionality is similar for each workspace. Advanced search attribute list will differ depending on the workspace in which the search is being executed.

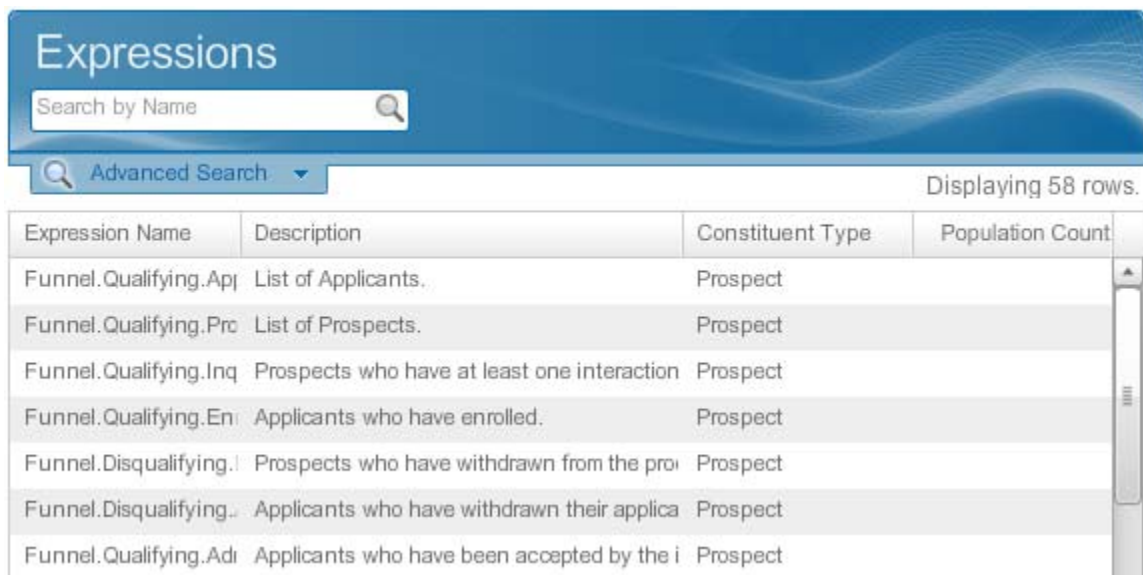
When you first open the **Prospects** tab in Banner Relationship Management, the Search for Prospects view displays. You can search by one or more of the displayed search options. The **Last Name** field is not a required field so if you only had an e-mail address, you could search by e-mail address only. Once you press the Enter key on the keyboard or click the **Go** button at the bottom of the Search for Prospects area, the names of all profiles who match the search criteria will display. You could select more attributes to search for by using the More Attributes drop-down arrow and selecting additional types of search criteria.

The process for using the **Students** and **Alumni & Friends** profiles are very similar. The type of details in each profile type is different.

The screenshot shows the Banner Relationship Management software interface. At the top, there is a navigation bar with tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications', and 'Administration'. To the right of these tabs are links for 'Preferences' and 'Sign Out', and a 'Help' button. The main content area is titled 'Search for Prospects' and features a search form with fields for 'Last Name', 'First Name', 'Banner ID', 'Email Address', 'Area Code', and 'Phone Number'. Each field has a small 'X' icon to its right. Below these fields is a 'More Attributes' dropdown menu. To the right of the search form is a 'Profile Summary' sidebar. Below the search form, it says 'Displaying 0 rows.' and shows a table with the following headers: 'Last Name', 'First Name', 'Gender', 'Birth Date', 'Level', 'Field of Stu', 'Application', 'Application', and 'Term'. The table is currently empty. At the bottom of the interface, there is a footer with copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330)' and the 'SUNGARD HIGHER EDUCATION' logo.

Basic search

Some windows have a single Search feature that helps you find information. The most common value that you would generally search on for a specific page is in the **Search** field by default. In this example from the Administration tab, you would type the expression name in the **Search** field where it says *Search by Name*, then click the **Go** button.



The screenshot shows a window titled "Expressions" with a search bar labeled "Search by Name" and a magnifying glass icon. Below the search bar is a tab labeled "Advanced Search" with a dropdown arrow. To the right of the tab, it says "Displaying 58 rows." Below this is a table with four columns: "Expression Name", "Description", "Constituent Type", and "Population Count". The table contains seven rows of data.

Expression Name	Description	Constituent Type	Population Count
Funnel.Qualifying.Appl	List of Applicants.	Prospect	
Funnel.Qualifying.Pro	List of Prospects.	Prospect	
Funnel.Qualifying.Inq	Prospects who have at least one interaction	Prospect	
Funnel.Qualifying.Enr	Applicants who have enrolled.	Prospect	
Funnel.Disqualifying.I	Prospects who have withdrawn from the pro	Prospect	
Funnel.Disqualifying.A	Applicants who have withdrawn their applica	Prospect	
Funnel.Qualifying.Ad	Applicants who have been accepted by the i	Prospect	

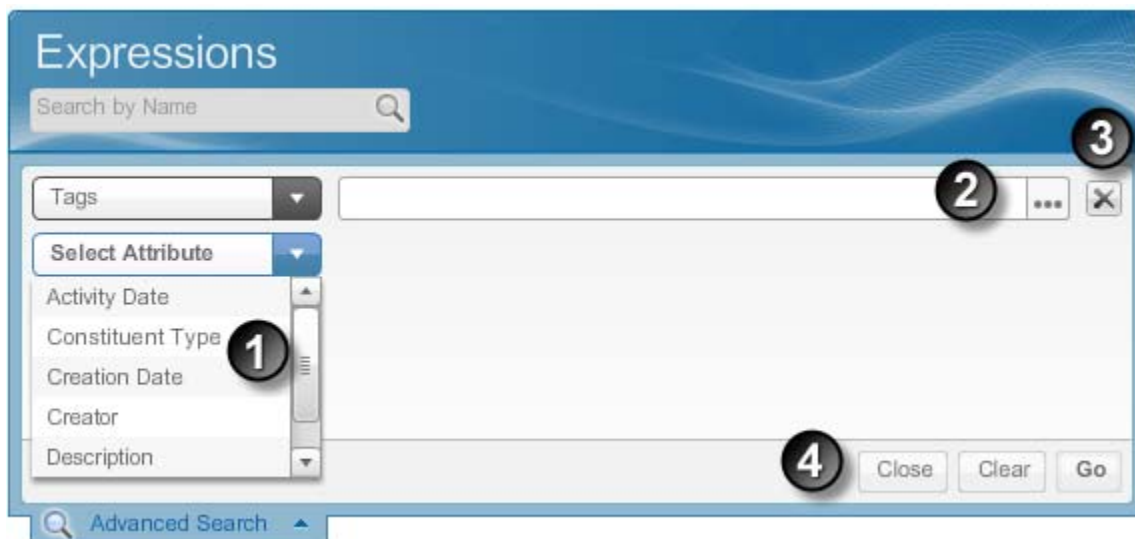
Advanced search


In any Search view, you can perform an advanced search by clicking the **Advanced Search** tab below the **Search** field.



The screenshot shows the same "Expressions" window as before, but the "Advanced Search" tab is now selected and highlighted. The search bar and the "Displaying 58 rows." text are still visible.

This function allows for a search of additional criteria based on the attributes associated with the workspace.



Number	Name	Decription
1	Select Attributes	select needed attribute from the pull down list.
2	Information field	enter the information or select from a list using the  button.
3	Delete icon	to remove the attribute from the search. The Clear button will remove all attributes.
4	Execute buttons	to close without searching, clear all of the fields or click Go to execute the search.

Perform a wildcard search

To use a wildcard to represent one or more characters:

In the search field or in any advanced search field, you can use an asterisk (*) or a percent sign (%) as a wildcard to represent any missing characters.

When searching on last name, you are required to enter at least three characters of the last name. The first character of any search cannot be a wildcard.


For example:

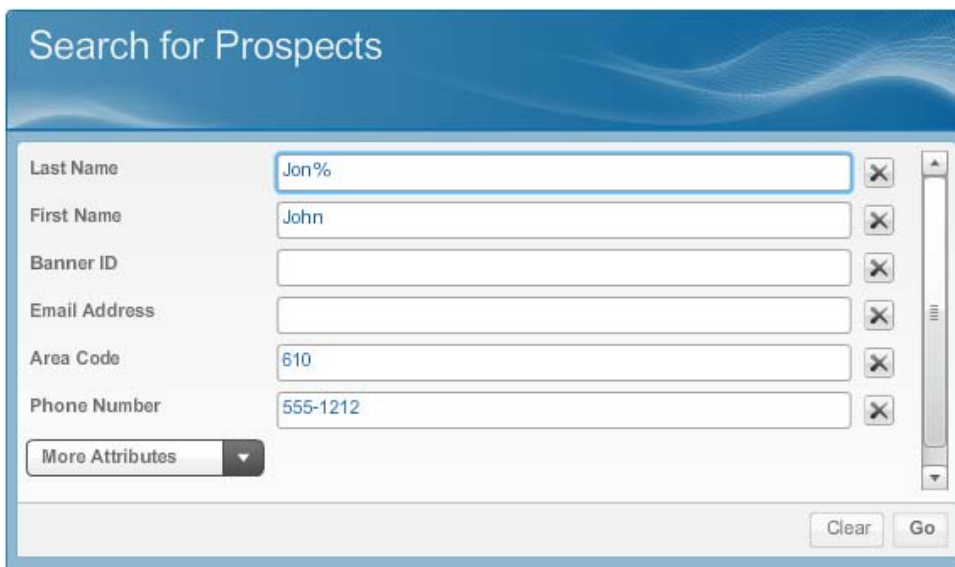
- If you know a last name begins with **Jon**, enter **jon***.
- Click Search or click Go to display the results of your search.

If you did not know how to spell the name, you could enter the partial name followed by an asterisk (*) or a percent sign (%). The asterisk (*) and percent sign (%) are wildcard characters that will return anything that begins with the letters entered before it.

Clear a search

Clearing searches after usage is recommended in order to keep search criteria from running together. You can clear a previously performed search before performing another search in either the simple or advanced search options.

The delete icon  will clear individual search criteria. The **Clear** button will clear all search criteria.



Customizing the view

When items are displayed in a table such as a list of search results, profiles, templates, population lists, or users, you can customize the view to make the information easier to read on screen.

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'. To the right of these tabs are links for 'Preferences' and 'Sign Out', and a 'Help' button. Below the navigation bar, the 'Search for Prospects' section is active. It features a sidebar on the left with links for 'Population Lists', 'Interactions', and 'Funnels'. The main area shows a table of search results. Above the table, there is a 'Profile Actions' bar with buttons for 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. Below this is a 'Search for Prospects' header with a search description: 'Area Code = 610'. The table itself displays 147 rows of data. The columns are: Last Name, First Name, Gender, Birth Date, Level, Field of Study, Application, Application, and Term. The data is sorted by Last Name in ascending order. A 'Profile Summary' sidebar is visible on the right side of the table.

Last Name	First Name	Gender	Birth Date	Level	Field of Study	Application	Application	Term
Lee	Joshua	Male	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Smith	Jacob	Male	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Johnson	Michael	Male	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Chin	Matthew	Male	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Perez	Angel	Female	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Kupar	Raoul	Male	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Miller	Daniel	Male	Jan 01, 19	Undergrad	Anthropology	Incomplete		Fall 2010
Smith	Emily	Female	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Johnson	Madison	Female	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Williams	Emma	Female	Jan 01, 19	Undergrad	Biology	Incomplete		Fall 2010
Bradstreet	Arthur	Male	Jun 10, 19	Undergrad				Fall 2005-2
Touchton	Wally	Male	May 21, 19	Undergrad				Fall 2009
Jacquet	Mario	Male	May 03, 19	Undergrad				Summer 20
Delano	Erin	Male	Jun 09, 19	Undergrad				Fall 1993
Fuhr	Keith	Female	May 23, 19	Undergrad				Summer 20

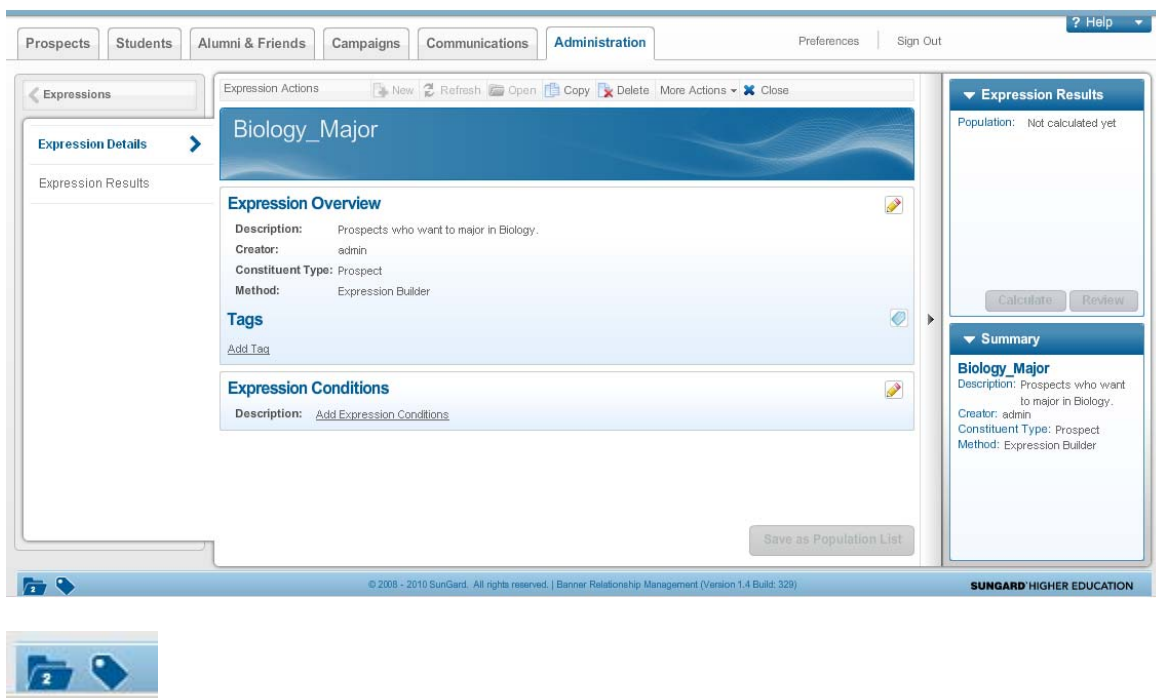
- **Sorting a column** - Click in the header row of any column to sort the column in ascending order (numerical and alphabetical). Click the column header again to reverse the sort order. An up or down sort arrow in the column header indicates which way the data is being sorted.
- **Reordering columns** - Change the order in which the columns appear by clicking on the column, hold down the left mouse button, move the column to its new location and release the button.
- **Changing the Width of a Column** - Change the width of a column by clicking on the right border of the column, hold down the left mouse button and pull the column to the desired width and release the button.

Application Footer

The application footer provides access to functions that can be used throughout the workspace. The footer is located in the lower left corner of the application, no matter which workspace is open.

Two capabilities are available there:

- **Open Items**
The Open Items list is represented by a folder icon. Click the icon once to open the list. You can scroll down to view all your open items, or use the Maximize button to display a larger view. To close the Open Items window, click Close or click the folder icon. The number of open items is displayed on the folder icon.
- **Tags**
Tags are accessible on the application footer by clicking the tag icon. When a taggable item is open in the workspace, the Tag utility will be enabled if the user has appropriate permissions. Click the tag icon once to open the list of available tags. Click on any tag in the list to associate it to the item displayed in the active window. Associated tags are displayed in bold text. To de-associate a tag, click the tag in the list again. To close the Tags window, click the Tag icon or click Close.



Tags

Banner Relationship Management provides users the ability to associate a tag with an entity directly from the entity's Overview page. The Add and Remove Tags capability is available on the Overview page for Populations, Campaigns, Templates, Profile 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, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. A 'Help' button is located on the right. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with 'Population Lists' and 'Overview' links. The central area shows the 'Biology Majors' population overview. It includes a 'Population Actions' bar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. Below this, the 'Population Overview' section displays details such as Description (Prospects who want to major in Biology), Owner (admin), Shared (No), Results Locked (No), and Expression (Biology Majors (Parameters are: Current Term Equals Fall 2010)). A 'Tags' section shows a list of tags: '2010 Prospects', 'College of Arts and Science', and 'Undergraduate Level'. A 'Close' button is next to the tags. Below the tags, there is an 'Available Tags' section with links for '2009 Prospects', '2010 Prospects', '2011 Prospects', 'Admissions', 'Alumni', 'Athletics', 'College of Arts and Science', 'College of Business', 'College of Law', 'College of Medicine', 'Graduate Level', and 'Undergraduate Level'. At the bottom of the main content area, there are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'. On the right side, there is a 'My Prospect Lists' section with a search bar and a list of lists: '50Profiles', 'AD-pop_P1AA', 'AD_priority_Pop', 'Biology Majors', 'Pop-50Profiles', 'UG_Prospect_Instate', and 'pop_aab'. Below this is a 'Population Summary' section with 'Population Results' (Total: 14, Last Calculated: Jul 15, 2010 3:42 PM, Shared: No, Results Locked: No), 'Manually Included' (Total: 0), and 'Manually Excluded' (Total: 0). The footer of the interface contains copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 323)' and the 'SUNGARD HIGHER EDUCATION' logo.

Common Control for Multiple Selection

As you navigate further into Banner Relationship Management, you may want to select multiple attributes or populations. Multiple selection, the ability to select one or more items as shown in the Interactions example below when you create a Watch List of several selected Population Lists, is also available in the following areas of Banner Relationship Management:

- Profile Interests
- Profile Race
- Role Permissions
- Profile Attributes
- Advanced Search by Campaign

Multiple Selection (multi-select for short) features a workspace window vertically split into two panes. The left pane displays all a user's selectable options for the activity, and the right pane displays the options the user selects. You can select items individually or in groups. To add an individual option from the left to the list on the right, check its checkbox, or select it and click the arrow icon (->), or drag it to the right pane. To add a group of items, check all desired boxes and click the arrow icon (->) or hold down the Shift key or the Control key and select the items. Once an item is added to the right, it's removed automatically from the left.

Select Population List

Available Population List(s)

Search by Name

Advanced Search Displaying 7 rows.

<input type="checkbox"/>	Population List	Owner	Count
<input type="checkbox"/>	Elementary Ed M...	admin	0
<input type="checkbox"/>	Honors	admin	0
<input type="checkbox"/>	In state residents	admin	0
<input type="checkbox"/>	MBA Candidates	admin	0
<input type="checkbox"/>	Med School Candi...	admin	0
<input type="checkbox"/>	Out of state reside...	admin	0
<input type="checkbox"/>	Transfer students	admin	0

Selected Population List(s)

Clear List

Population List	Owner	Count	<input type="button" value="x"/>
Anthropology Majors	admin	0	<input type="button" value="x"/>
Biology Majors	admin	40	<input type="button" value="x"/>
Chemistry Majors	admin	0	<input type="button" value="x"/>

Globalization

Banner Relationship Management contains the ability to translate and localize both the user interface and data in the Banner Relationship Management Workspace and the Prospective Student Portal in a single language. French and Spanish are the initial languages supported by the translation and localization effort. The Preferred Language setting in the browser determines the language that is displayed for the Banner Relationship Management Workspace user and the prospect in the Prospective Student Portal. This setting is determined for each specific user independently, supporting campuses with a mix of languages among their staff. There are several parts of the system that are not controlled by the user interface and are unaffected by the language selection. These items are primarily data that are included as part of the install, such as expression attributes and personalization fields.

Workspace Overview

Prospects

The profile manager is the central location for working with prospects, students and alumni. Each profile manager workspace is segmented based on the type of profile and is represented as a separate tab. 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.

When you open a prospect profile, the **Prospect Overview** view displays a summary of profile details. Notice the **Prospect Overview** contains **Biographical**, **Academic**, **Personal Outlook**, **Recruitment**, **Admissions**, and **Interaction** data.

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.

The screenshot displays the SunGard Higher Education Relationship Management software interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. A search bar for prospects is on the left. The main content area shows the profile for Joshua Lee, with sections for Biographical, Academic, Personal Outlook, and Recruitment. The right sidebar contains a Recruit Track and a Profile Summary for Joshua S Lee.

Prospect Overview

Biographical

Residence: In state Resident
Citizenship: Citizen
Ethnicity: Caucasian
Gender: Male

Academic

Program: BS in Biology
Level: Undergraduate
High School: Malvern High School
College:
Major: Biology
Degree: Bachelor of Arts
GPA: 3.96
Test Scores: SAT Verbal 600, SAT Mathematics 650

Personal Outlook

Interests: Art, Debate, Dramatics
Attributes:
Sources: Downingtown Senior High School

Recruitment

Recruit Type: New Recruit
Recruit Status:
Student Type: 1st Time Freshman
Geo Region:

Recruit Track

Fall 2010-1 UG Biology

Profile Summary

Card | Funnel History

Joshua S Lee

Banner Id: T00010043

610-555-1212 (Cell Phone)
610-555-1212 (Parent 1)
Banner.Student@yahoo.com
3 Main Street
Malvern, PA 19355
County: Chester
United States of America

Create Interaction | Contact

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Students

On the **Students** tab, an advisor can create lists of students for use in communications and campaigns designed to improve student retention.

When you open a student profile, the **Student Overview** view displays a summary of student profile details. Notice the **Student Overview** contains **Biographical**, **Curricula**, **Registration**, **Academic Performance**, **Advisors**, **Affinity Groups**, **Student Engagement**, and **Interaction** data.

The screenshot displays the Banner Relationship Management (Version 1.4) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Student Overview" and features a sidebar with navigation links: Biographical, Curricula, Registration, Academic Performance, Advisors, Affinity Groups, Student Engagement, and Interaction. The main panel shows the profile of Shenita Von Beckler, with sections for Biographical, Academic, Affinity Groups, Primary Advisor, and Student Engagement. The right sidebar contains a "Student Summary" section with a dropdown for "Spring 2010 - Current" and a "Profile Summary" section for Shenita Celesta Von Beckler, including contact information and address. The footer includes copyright information for SunGard (2004-2010) and the SUNGARD HIGHER EDUCATION logo.

Student Overview

Biographical

Preferred Name: Shenita
Citizenship: Citizen
Ethnicity: Black or African-American
Gender: Female

Academic

Level: Undergraduate
Program: BS in Biology
Degree Status: Sought
Admit Type: Standard
Major: Biology
First Attended: Fall 1992
Admit Term: Spring 2010
Degree: Bachelor of Science

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

Student Engagement

Activities: Alumni Board Member; National Accounting Assn

Student Summary

Spring 2010 - Current
Undergraduate
Active
Continuing
Freshman
In state Resident

Fall 1992 to Spring 2010
Undergraduate

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

Create Interaction Contact

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Alumni & Friends

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.

When you open an Alumni & Friends profile, the **Profile Overview** view displays a summary of profile details. Notice the **Profile Overview** contains **Biographical** and **Interaction** data.

The screenshot displays the Banner Relationship Management software interface. At the top, a navigation bar includes tabs for Prospects, Students, Alumni & Friends (which is selected), 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, a search bar on the left is labeled 'Search for Alumni & Frie...'. The main content area is titled 'Profile Overview' and features a sidebar with links to 'Biographical' and 'Interaction' data. The central profile card for 'Penny Parker' shows biographical details: Preferred Address: Mailing, Citizenship: (blank), Ethnicity: (blank), and Gender: Female. It also shows interaction data: Current Interaction: Phone Call Placed and Interaction Date: Jul 24, 2010 11:44 AM. To the right of the profile card is a summary section with two expandable panels: 'Advancement Summary' and 'Profile Summary'. The 'Advancement Summary' panel shows Donor Categories: Alumna/us, Preferred Class Year: 1972, and Preferred College: College of Arts Sciences. The 'Profile Summary' panel shows Banner Id: T00010054, BannerAlumni@yahoo.com, and address: 123 Main Street, Malvern, PA 19355, County: Chester. At the bottom of the profile card are two buttons: 'Create Interaction' and 'Contact'. The footer of the interface contains copyright information: © 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330) and the SUNGARD HIGHER EDUCATION logo.

Biographical	
Preferred Address: Mailing	Ethnicity:
Citizenship:	Gender: Female

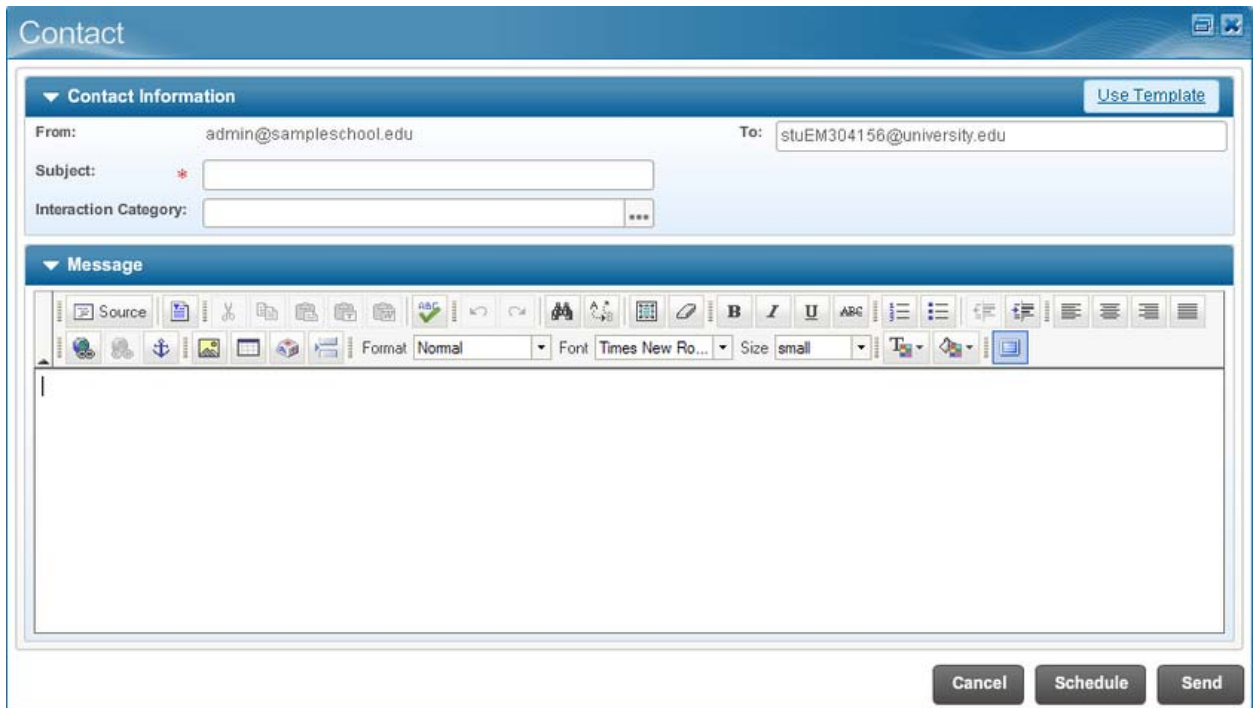
Interaction	
Current Interaction: Phone Call Placed	Interaction Date: Jul 24, 2010 11:44 AM

Advancement Summary	
Donor Categories:	
Alumna/us	
Preferred Class Year: 1972	
Preferred College:	
College of Arts Sciences	

Profile Summary	
Penny Parker	
Banner Id: T00010054	
BannerAlumni@yahoo.com	
123 Main Street	
Malvern, PA 19355	
County: Chester	

Contacting a profile

You can contact a profile via e-mail by clicking the Contact button at the bottom of any profile view. You can type your own e-mail (ad hoc) or click the **Use Template** link to use an existing e-mail template. Pre-defined templates are created in the Communications workspace.



The screenshot shows a 'Contact' dialog box with a blue header bar. Below the header, there are two sections: 'Contact Information' and 'Message'. The 'Contact Information' section contains fields for 'From' (admin@sampleschool.edu), 'To' (stuEM304156@university.edu), 'Subject' (with a red asterisk icon), and 'Interaction Category' (with a dropdown menu). A 'Use Template' link is located in the top right corner of this section. The 'Message' section features a rich text editor with a toolbar containing various icons for text formatting (bold, italic, underline, text color, background color), alignment, and other functions. Below the toolbar is a large text area for composing the message. At the bottom right of the dialog box, there are three buttons: 'Cancel', 'Schedule', and 'Send'.

Note: The process for contacting profiles in the **Prospects**, **Students** and **Alumni & Friends** tabs is the same.

Recording Interactions

Interactions are communications between the institution and a prospective student, current student, alumnus, or friend of the institution. You can create an interaction to record multiple types of contacts that you have with a profile including phone calls, e-mails sent and e-mails received. The Interaction view shows an accurate record of the interactions with an individual profile.

Notice in this student example that the student's face to face interactions with her advisor is recorded. The process for creating interactions for profiles in the **Prospects**, **Students** and **Alumni & Friends** tabs is the same.

The screenshot displays the SunGard Relationship Management Overview interface. The top navigation bar includes tabs for Prospects, Students (selected), Alumni & Friends, Campaigns, Communications, and Administration. A 'Search for Students' sidebar is on the left, and a 'Student Summary' sidebar is on the right. The main content area shows the profile of Shenita Von Beckler, with a table of interactions displayed below the profile header.

Date	Source	Category	Type	Created	Organization	Subject Line
Jul 01, 2010	Manually Ente	Manual	Face To Face	admin	Advising Office	Counselor Visit
Jul 01, 2010	Communicatio	E-mail	E-mail Sent To	admin	Root Organization	Schedule Advisin
Feb 23, 2010	Banner	Banner	Banner Contac		Root Organization	College Night
Feb 23, 2010	Banner	Banner	Banner Contac		Root Organization	Merit List Letter

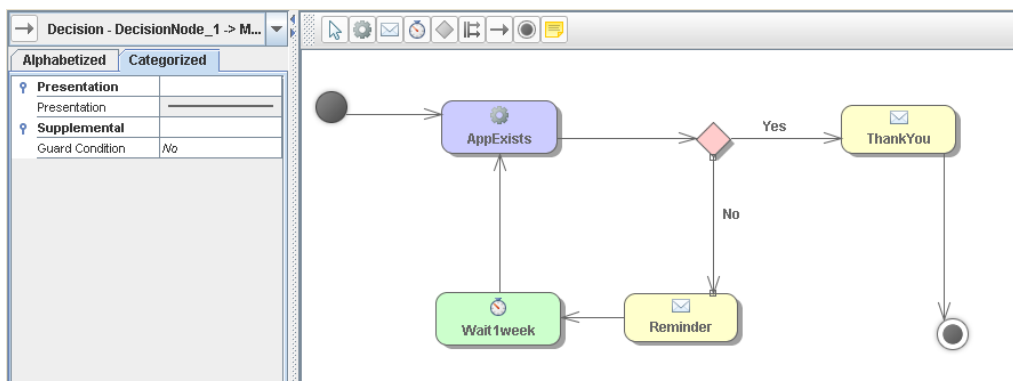
Campaign Management

The **Campaigns** tab provides powerful tools to effectively design, initiate and track recruitment, retention and alumni campaigns.

The screenshot shows the 'Campaigns' tab in the Banner Relationship Management software. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. Below the navigation bar, there are sections for 'Campaign Actions' (New, Refresh, Open, Copy, Delete, More Actions, Close) and 'Campaigns' (Search by Name, Advanced Search). The main area displays a table of campaigns with columns: Name, Description, Administrator Role, Population List, and Status. The table shows four rows of data. On the right side, there are two panels: 'Campaign Alerts' and 'Campaign Details' (Summary, Effectiveness). The 'Campaign Details' panel shows a list of campaigns, including 'Midterm Failing (Student)' with an initial list count of 6398 and a status of Active. A checkbox for 'Recalculate List On Launch' is also visible.

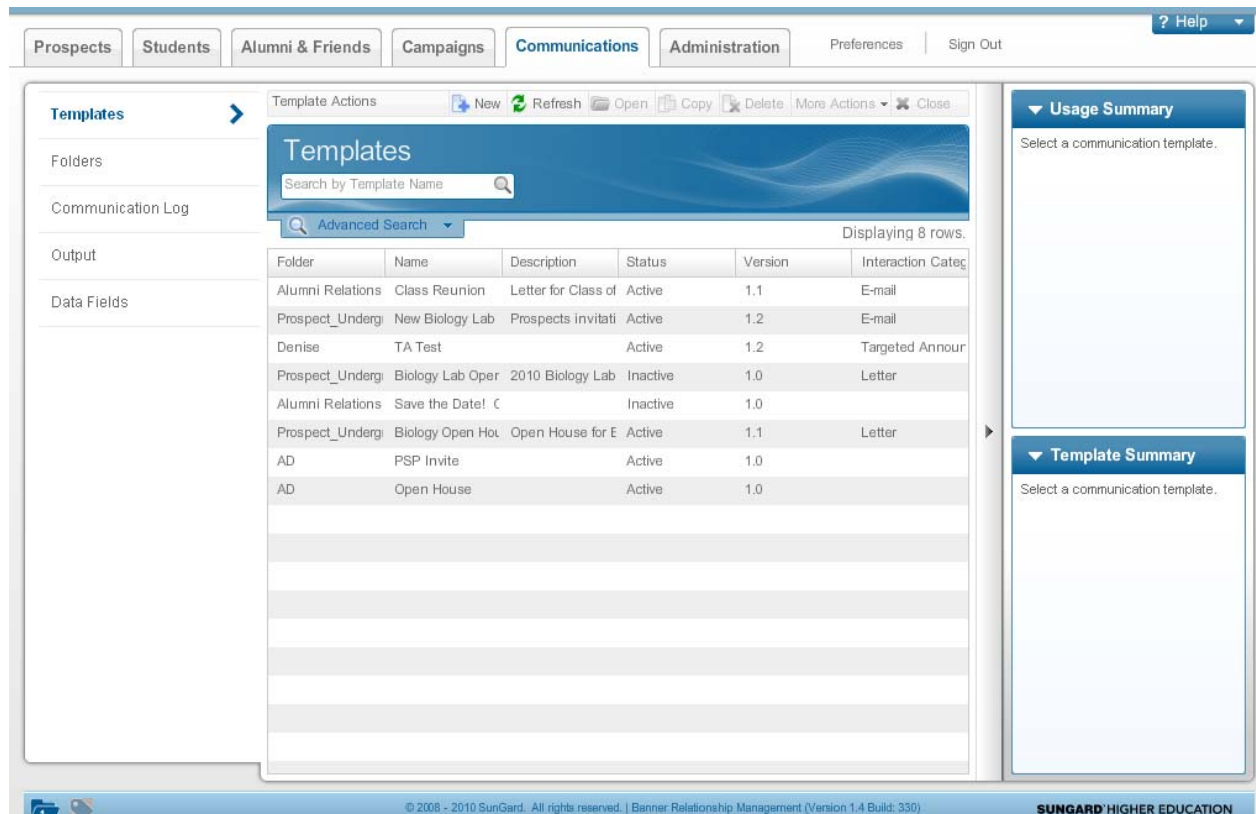
Name	Description	Administrator Role	Population List	Status
Prospects	New prospects	Recruiter	Biology.Majors	Development
Midterm Grade Interv	Identifying and notify	Admin	Midterm Failing	Active
Midterm Grade Interv	Identifying and notify	Admin	Midterm Failing	Development
				Development

The graphical Campaign Modeler helps you design simple to complex recruiting campaigns based on specific departmental or institutional objectives. You can associate campaigns with departmental or institutional objectives, and modify campaign templates to meet changing requirements. You can monitor progress to goals easily, intervening at any point to make adjustments.



Communications

The Communications function allows the creation of e-mails, letters, targeted announcement templates, and management of personalization data fields.



The online editor helps you personalize communications. You can use the formatting tools to enhance your messages and add graphics.

Banner Relationship Management delivers sophisticated communication services that allow you to draw on profile information to create dynamic, highly personalized e-mail and letter content based on a specific prospect's interests and needs, or based on common attributes of groups. With the tools in the **Communications** tab, you can manage and bundle letters and mailing labels for printing. You can use the existing personalization fields such as first and last name or create your own.

Administration

The **Administration** tab provides the workspace to manage the functions that work behind the scenes of Profile Manager, Communications, and Campaigns. Using it you define your unique requirements for the system's users, including their roles and permissions. You can create and modify the expressions that help you identify and group constituents with common attributes. You can create and manage the business rules to analyze data and perform tasks across the application. You can define institution specific values for tags that are the most meaningful to you to help you organize and search for objects such as campaigns, templates and expressions. You can define the institution specific values for interaction categories that will help you track and analyze manual interactions with your constituents. You can define the organization specific values within your institution so that the communications from each organization such as the Admissions Office or Alumni Development Office have their own unique letter-based, e-mail and reply to addresses. Finally, you can customize your probability and desirability models, as well as your admissions funnel and track progress toward your enrollment and retention goals.

The screenshot displays the SunGard Relationship Management Administration interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the left sidebar contains a list of administrative functions: Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags, Categories, Organizations, and Communication Configuration. The main content area is titled 'Users' and features a search bar with the text 'Search by Last Name' and an 'Advanced Search' dropdown. Below the search bar is a table displaying a list of users. The table has columns for User Name, First Name, Last Name, Effective From, Effective To, and E-mail. The table shows 20 rows of data, including users like 'admin', 'communicationsuser', 'expressionsuser', 'funnelsuser', 'advisor', 'alumniprofilereader', 'rakhi', 'studentprofilereader', 'alumniprofileuser', 'adesai', 'recruiter', 'readonlyuser', 'campaignuser', 'populationsuser', 'prospectprofileuser', 'prospectprofilereader', 'rulesuser', and 'studentprofileuser'. The footer of the interface includes copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330)' and the SunGard Higher Education logo.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
admin	Administrator	Administrator	Jan 01, 2007 10:01 AM		admin@sampleschool.edu
communicationsuser	CommunicationsUser	CommunicationsUser	Jan 01, 2007 10:01 AM		CommunicationsUser@sampleschool.edu
expressionsuser	ExpressionsUser	ExpressionsUser	Jan 01, 2007 10:01 AM		ExpressionsUser@sampleschool.edu
funnelsuser	FunnelsUser	FunnelsUser	Jan 01, 2007 10:01 AM		FunnelsUser@sampleschool.edu
advisor	Advisor	Advisor	Jan 01, 2010 10:01 AM		Advisor@sampleschool.edu
alumniprofilereader	AlumniProfileReader	AlumniProfileReader	Jan 01, 2010 10:01 AM		AlumniProfileReader@sampleschool.edu
rakhi	rakhi	rakhi			rakhi@university.com
studentprofilereader	StudentProfileReader	StudentProfileReader	Jan 01, 2010 10:01 AM		StudentProfileReader@sampleschool.edu
alumniprofileuser	AlumniProfileUser	AlumniProfileUser	Jan 01, 2010 10:01 AM		AlumniProfileUser@sampleschool.edu
adesai	Desai	Desai	Jul 22, 2010 12:00 AM		adesai@sghe.com
recruiter	Recruiter	Recruiter	Jan 01, 2007 10:01 AM		recruiter@sampleschool.edu
readonlyuser	ReadOnlyUser	ReadOnlyUser	Jan 01, 2007 10:01 AM		ReadOnlyUser@sampleschool.edu
campaignuser	CampaignUser	CampaignUser	Jan 01, 2007 10:01 AM		CampaignUser@sampleschool.edu
populationsuser	PopulationsUser	PopulationsUser	Jan 01, 2007 10:01 AM		PopulationsUser@sampleschool.edu
prospectprofileuser	ProspectProfileUser	ProspectProfileUser	Jan 01, 2007 10:01 AM		ProspectProfileUser@sampleschool.edu
prospectprofilereader	ProspectProfileReader	ProspectProfileReader	Jan 01, 2007 10:01 AM		ProspectProfileReader@sampleschool.edu
rulesuser	RulesUser	RulesUser	Jan 01, 2007 10:01 AM		RulesUser@sampleschool.edu
studentprofileuser	StudentProfileUser	StudentProfileUser	Jan 01, 2010 10:01 AM		StudentProfileUser@sampleschool.edu

This is just a brief overview. Refer to the workbook for each workspace for more detailed information.

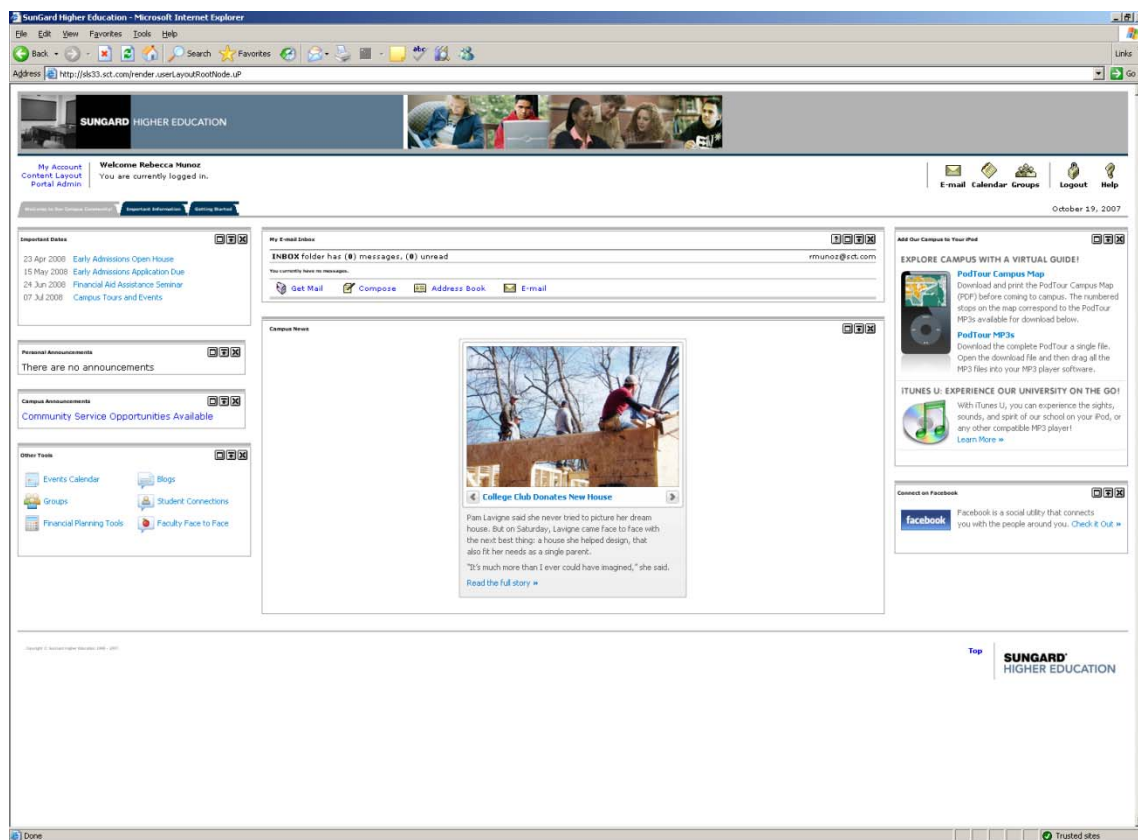
Prospective Student Portal

Prospective Student Portal

The Prospective Student Portal is a secure website built on the Luminis Platform that provides an individual's access to the university, prior to his or her acceptance and enrollment.

Institutions can then deliver content that targets information to the prospective students based upon individual interests. When a prospective student logs into the PSP, the content is dynamically displayed and can be personalized with their name, interests and other information specific to that individual. If a person updates their address, intended major, or interests, the updated information is fed back into Banner and displayed in the Profile Manager.

Prospective Student Portal example



Detailed training information is provided in the **Prospective Student Portal Training Workbook**.

Recruiting and Admissions Performance Overview

Overview

Performance Management provides a reporting centric data structure to enhance the analytical and operational reporting ability within the Relationship Management Solution.

Banner Recruiting and Admissions Performance is used by recruiting/admissions staff and institutional decision makers for daily operational reporting and monitoring progress towards recruitment goals and objectives. A package of operational reports is provided with the Performance Management solution. These reports display trends of outcomes, summaries of current outcomes and detailed lists of recruits and applicants. The Performance Management solution also includes capabilities to configure organizational scorecards to reflect your organizations specific recruitment goals, objectives and Key Performance Indicators (KPIs).

There are four main features delivered with Performance Management.

Dashboards	Reports	Queries	Scorecards
Special performance charts that tell you where you are. Examples: 15,587 inquiries, 3,306 applicants, 2,028 registered.	Delivered trend, summary, and detail Recruiting and admissions reports that you can execute or modify for your institution. A library of reports is delivered with Performance Management.	Query Studio is a Cognos tool that helps non-technical users create ad hoc reports to answer a business question.	Organization of institution mission, goals and objectives including specific key performance indicators (KPIs that use delivered metrics) to measure progress towards goals and objectives.