

Banner Enrollment Management Suite Relationship Management Communications Training Workbook

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5/5/2011	Corrected typo Rule URL to Rule URI.

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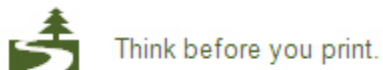


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Using Communication Templates



Section goal

In this section, you will build and maintain communication templates in Banner Enrollment Management.

Objectives

In this section you will learn how to:

- use folders
- create a communication template
- create template content
- use the communication log
- work with communication output.

Intended audience

Administrators responsible for building communication templates at an institution.

Communications Overview


Introduction

The Communications Tab is where communication templates are created and managed. Click the Communications Tab from the main menu of Banner Enrollment Management to access the Communications Tab view.

Communications view

The screenshot displays the Banner Enrollment Management interface with the 'Communications' tab selected. The main content area shows the 'Templates' section with a search bar and a table of templates. The table has columns for Folder, Name, Description, Status, Version, and Interaction Category. One row is visible: DM, DMM.Temp1, Active, 1.0, E-mail. The right sidebar contains two sections: 'Usage Summary' and 'Template Summary', both with a 'Select a communication template.' prompt. The bottom status bar shows copyright information and the SunGard logo.

Folder	Name	Description	Status	Version	Interaction Categ
DM	DMM.Temp1		Active	1.0	E-mail

Tip: Use the **Refresh** icon ( Refresh) in the Enrollment Management toolbar when refreshing the screen. Do not use the web browser's **Refresh** button.

The left hand menu consists of the following options:

- **Templates** - a communication template is used to create text for letters, emails and targeted announcements.
- **Folders** - a folder is used to organize and group a set of templates. Folders can be used to organize templates for a specific department or to organize templates by their functional use. Templates cannot be moved from one folder to another after they are published so therefore the folder structure should be set up and established before creating templates.
- **Communication Log** - the Communication Log allows you to search for and review the details of an individual communication record. The Communication Log can be used to verify that a specific communication or group of communications was successfully processed during a specified date range.
- **Output** – the Output includes all communications to profiles via printable letters, commas-separated lists of addresses, and mailing label that you've created as a result of campaign and group sends.
- **Data Fields**- the data fields categorizes groups in the Relationship Management application which allows institutions to manage and refine communications for constituents using the Personalization Fields for the content template.

The Actions toolbar at the top of the main window offers additional tools which vary depending on the current window.

In this workbook, you will be creating, managing and updating communication templates and the corresponding folders in Banner Enrollment Management.

Using Folders

Introduction

Folders allow you to group communications so as to more easily find similar communications. Since the system saves all communication templates in order to record and track communications sent to individuals, grouping templates in folders will be important to assist in finding them.

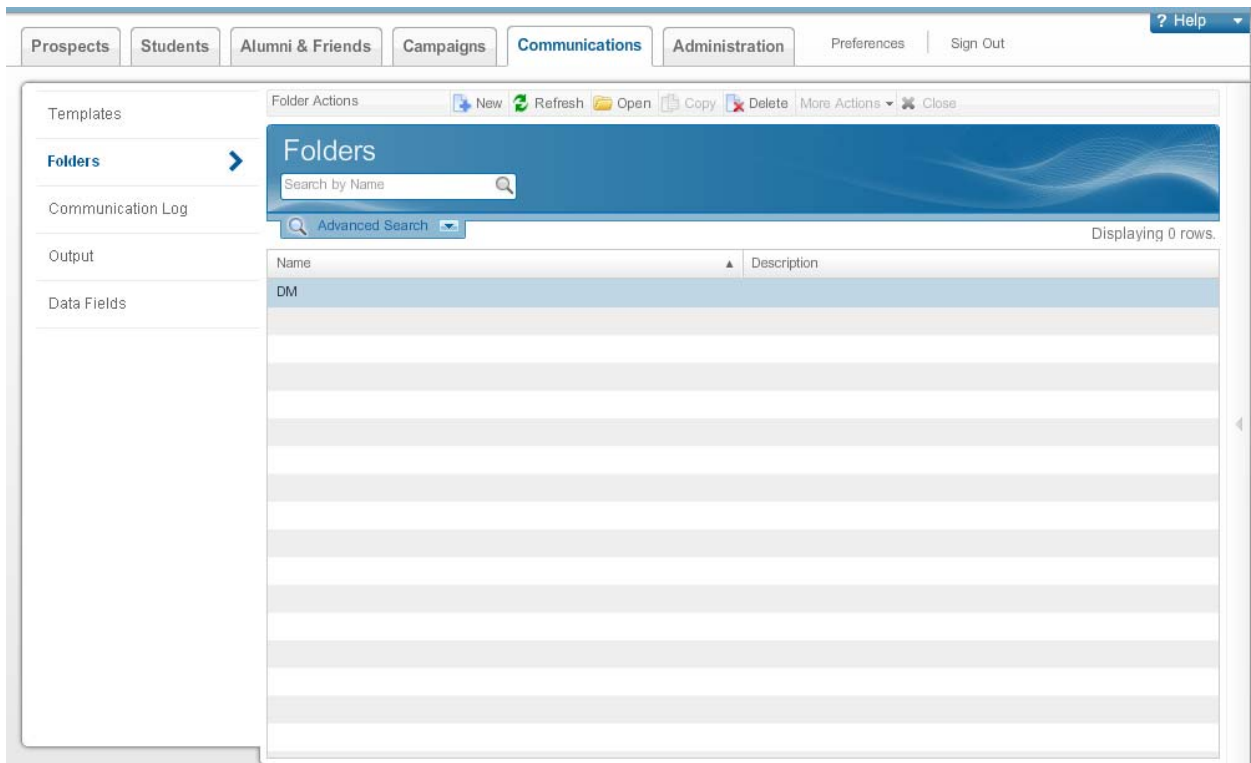
Carefully consider how your template folders should be logically grouped. Templates can't be deleted, moved or copied to other folders once they've been used, but a template can be recreated in a different folder.

The name of the folder can be changed, thus if the purpose of the folder changes from its original intent, you can change the name of the folder.

If a folder has the potential to include hundreds of templates, consider whether template names will be sufficient to facilitate searching or whether you should break this into multiple folders.

A standardized naming convention should be established and enforced in order to make the system easier to use. A naming convention will aid searches and sorting of long lists of objects, make it clear as to the purpose and use of the object and support scalable requirements as the system continues to expand with additional offices or departments. For assistance with developing a naming convention, please refer to Appendix A at the end of this document.

Folders view



Create a folder

1. From the Communications view, click **Folders**.
2. From the Folder Actions bar, click **New**.

The 'Create New Folder' dialog box is shown. It has a title bar with the text 'Create New Folder' and standard window controls. The main area contains two input fields: 'Name: *' and 'Description:'. The 'Name' field is required, indicated by a red asterisk. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Enter a **Name** (and **Description**, if desired) for your folder in their respective fields.
4. Click **Save** to create your folder.

Edit a folder

1. Open the folder that needs to be edited.
2. Click the **Edit** icon.
3. Edit the name of the folder. This field is required and can include spaces.
4. Edit the description of the folder (if necessary). This is not required, but will help to identify the purpose of the folder.
5. Click **Save** to store any changes.

Search for a folder

1. Click the **Folders** link in the **Communications** tab.
2. Enter the search criteria in the **Search by Name** field and click Search or click the Select Attribute tab or drop-down arrow and enter or select and attribute from the Look Up icon. Once an attribute is selected the next attribute tab automatically populates.

3. In the Search field, you can use an asterisk (*) or a percent sign (%) as a wildcard to represent any missing characters.
4. Click the **Go** button to display the results of the search.
5. The folders that meet the search criteria are displayed.

Exercise

1. Create a folder for your templates.
2. Search for your folder.
3. Edit your folder.

Communication Templates Overview

Introduction

Communication templates allow for the creation of email messages, letters, and targeted announcements and can contain personalized variables. You can use these templates to communicate to populations you have defined through Expressions or to convey information to specific persons.

A single communication template can include any or all of the following communication methods that allow you to determine the best way to distribute the communication to the intended audience:

- e-mail - delivered to the user's inbox
- letter - delivered to the user's postal address
- targeted announcement - delivered to the user's portal account

The communications are delivered based on a specific hierarchy which needs to be taken into consideration when developing a communications plan. The delivery hierarchy for communication templates is discussed in further detail in the next section.

Communications view

The Communications view lists all active and inactive templates currently in development and/or published for use.

The Usage Summary sidebar panel will display a list of any campaigns and scheduled communications that use the selected template, while the Template Summary sidebar panel displays general information about the template.

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications (selected), Administration, Preferences, and Sign Out. A Help icon is in the top right corner.

The main content area is titled "Templates" and includes a search bar with the text "Search by Template Name" and a magnifying glass icon. Below the search bar is an "Advanced Search" button. A table displays the following data:

Folder	Name	Description	Status	Version	Interaction Category
Alumni Relations	Volunteer Opport	2010 Volunteer C	Inactive	1.0	E-mail
Alumni Relations	Open House	2010 Invite to Bir	Active	1.1	E-mail
Denise	DMM.Temp1		Active	1.0	E-mail

Below the table, it says "Displaying 3 rows." The left sidebar contains links: Templates (selected), Folders, Communication Log, Output, and Data Fields. The right sidebar has two panels: "Usage Summary" with the text "Select a communication template." and "Template Summary" with the text "Select a communication template."

Communication Templates – Delivery Hierarchy

Delivery methods

At the time of installation, an institution will define its preference priorities for communications delivery. The institution can choose any order among the three delivery methods, but this is a global setting and will affect all templates.

Changing the priority does NOT affect the sequence that displays in the UI for templates. Template builders should be sure that they understand their institution's delivery sequence priorities.

If a template is set up to use more than one delivery method, the system will check each prospect targeted for the communication to determine which method to use for that prospect. If the prospect meets the criteria for the top priority communication method field, the system will use that method; otherwise, it drops to the next method specified in hierarchy. Each recipient will get only one version of the communication; they will get the highest preferred delivery method for which they qualify.

Prospects qualify by

- having a primary email address specified (for email)
- having a mailing address specified (for letter)
- having a prospective student portal account (for targeted announcements).

Scenarios

The following example scenarios assume that the institution has priorities set to

- 1) Email
- 2) Letter
- 3) Targeted Announcements.

Example - Template using all three communication methods

Joe Smith:

- Has email account and mailing address but no portal account.

- Joe gets the communication via email.

Jane Johnson

- Has email account; no mailing address or portal account.
- Jane gets the communication via email.

Donna Davis

- No email account. Has mailing address. No portal account.
- Donna gets the communication via letter.

Tim Jones

- No email account. No mailing address. Has portal account.
- Tim gets the communication via targeted announcement.

Example - Template using only email and letter methods

Joe Smith:

- Has email account & mailing address but no portal account.
- Joe gets the communication via email.

Jane Johnson

- Has email account; no mailing address or portal account.
- Jane gets the communication via email.

Donna Davis

- No email account. Has mailing address. No portal account.
- Donna gets the communication via letter.

Tim Jones

- No email address. No mailing address. Has portal account.
- Tim does not get the communication.

Example - Template using only email communication method

Joe Smith:

- Has email account & mailing address but no portal account.
- Joe gets the communication via email.

Jane Johnson

- Has email account; no mailing address or portal account.
- Jane gets the communication via email.

Donna Davis

- No email account. Has mailing address. No portal account.
- Donna does not get the communication.

Tim Jones

- No email address. No mailing address. Has portal account.
- Tim does not get the communication.

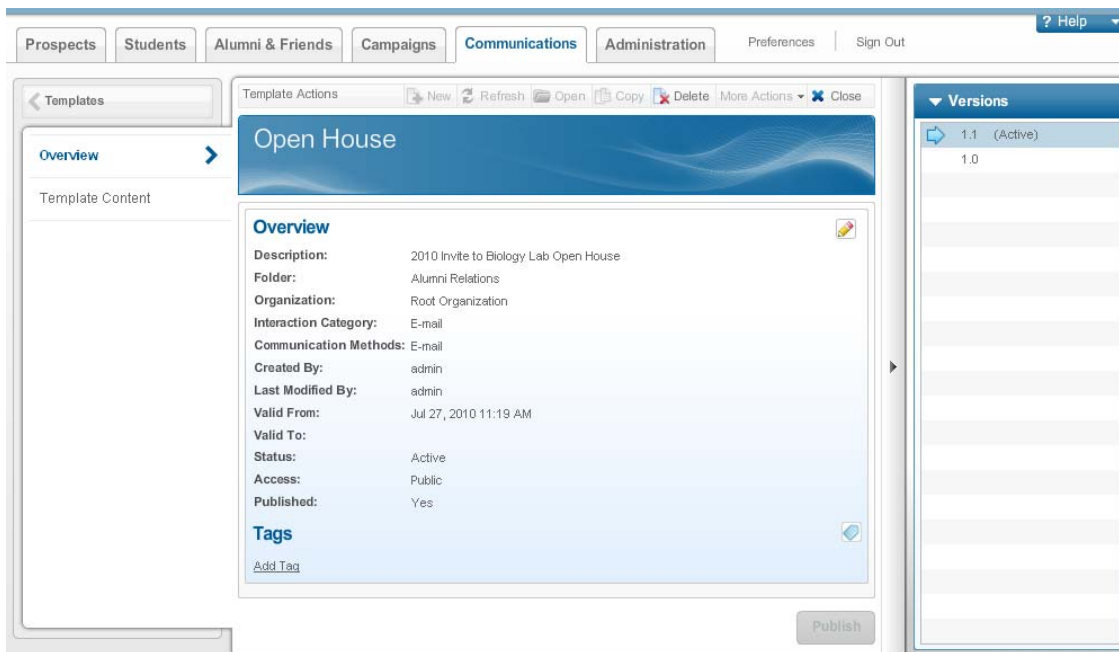
Creating a Communication Template

Template Overview

The Template Overview displays the general information about the selected template.

The Versions sidebar panel displays a list of the version history of the template and displays the latest published version and the Template Summary sidebar panel displays general information about the template.

The content of a template is created and managed in the **Template Content** window which can be accessed by clicking hyperlink in the left hand menu.



Creating a new communication template

1. From the main menu, select the **Communications** tab.
2. From the **Communications** tab, select **New** from the Communication Actions tab. All areas with an asterisk must be filled in.

Create New Template

Folder: * Advancement/Development Office

Template Name: *

Description:

Organization: *

Interaction Category:

Communication Methods: ☐ E-mail ☐ Letter ☐ Targeted Announcement

Created By: admin

Valid From: * Jul 27, 2010 at 11:52 AM

Valid To:

Access: Private

Cancel Save

Tip: To see who created the template simply read the **Created By** field which displays the ID of the user who created the template. This value cannot be modified.

3. Select which folder you want to save your template in the **Folder** field. (If you need to create a new folder, refer to the "Folders" lesson earlier in this chapter.)
4. Enter a name for your new template in the **Template Name** field. This field is required and can include spaces.
5. Enter the description of the template in the **Description** field. This is not required, but will help to identify the purpose of the template.
6. Select an organization using the **Look Up** icon in the **Organization** field.


Note: This is a required field.

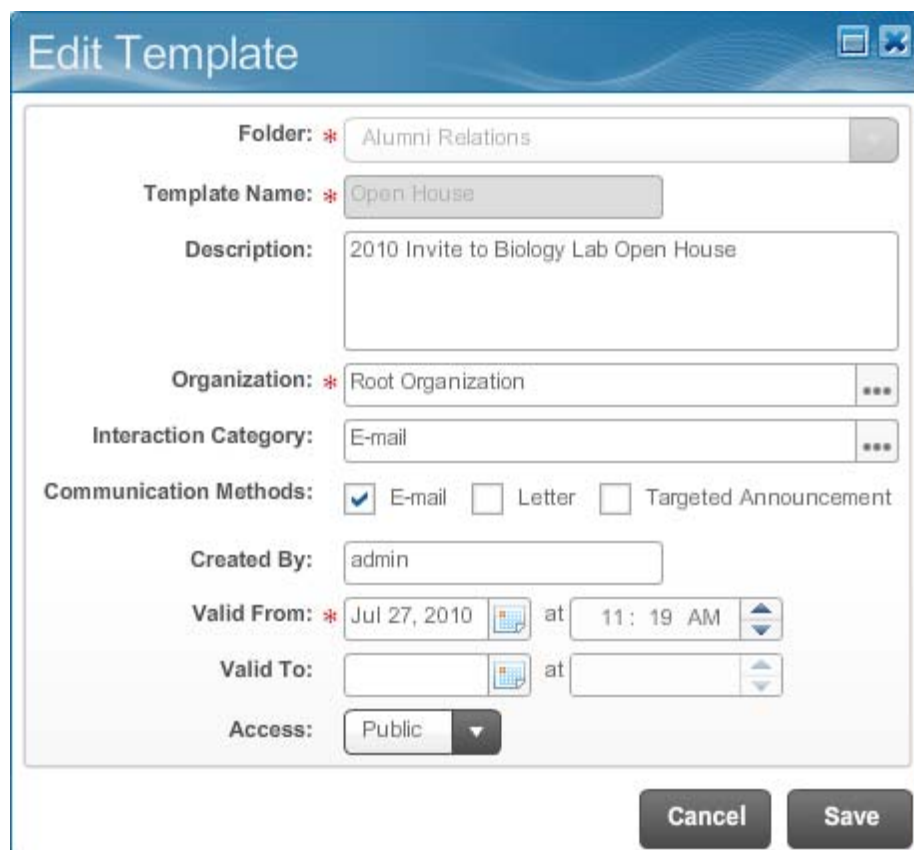
7. Select an interaction category if desired using the **Look Up** icon in the **Interaction** field.
8. Select the communication methods that this template will use. You can select one or more:

E-mail - content will be delivered to a registered e-mail address.
Letter - content will be delivered to a specified postal address.
Targeted Announcement - content will be displayed on an internet portal.
9. Select a start date for your template in the **Valid From** field. This field is required. A template will not be available for use prior to this date. You can also select a **Valid To** date. A template will not be available for use after this date. This is useful when a template contains, for example, an invitation to attend an event on a specific date to ensure that the template does not get used by mistake after the date has passed.
10. Select an access level for this template. This is not a required field.
 - Private - this template is private and can only be used by the creator of the template.
 - Public - this template may be used by any user.
11. Click **Save**.
12. You have successfully created a new communication template.

Editing a communication template

Editing an existing communication template's attributes is quite similar to creating one from scratch.

1. From the Communication view, double-click on your desired communication template to view its information.
2. Click the **Edit** () icon to edit the template's attributes.



Edit Template

Folder: * Alumni Relations

Template Name: * Open House

Description: 2010 Invite to Biology Lab Open House

Organization: * Root Organization ...

Interaction Category: E-mail ...

Communication Methods: ☒ E-mail ☐ Letter ☐ Targeted Announcement

Created By: admin

Valid From: * Jul 27, 2010 at 11:19 AM

Valid To: at

Access: Public ▼

Cancel **Save**

3. Modify the fields as desired.
4. Click **Save** to save your changes.

You have successfully edited your communication template. In the next section we will create the content for the template.

Creating Template Content

Template content

After creating the communication template, the next step is to create the template content.

The content of a template is the text that you wish to distribute to your reader. The display of your text can be customized in the Template Editor window to fit the needs of your institution and to help your communication achieve the intended results.

Template content may be customized using personalization fields. Personalization fields give you the ability to send a single message to a large group of individuals, while providing you the ability to customize personal content to meet the needs of an individual reader.


The Versions sidebar panel displays a list of the version history of the template. It also displays the latest published version and the Template Summary sidebar panel displays general information about the template.

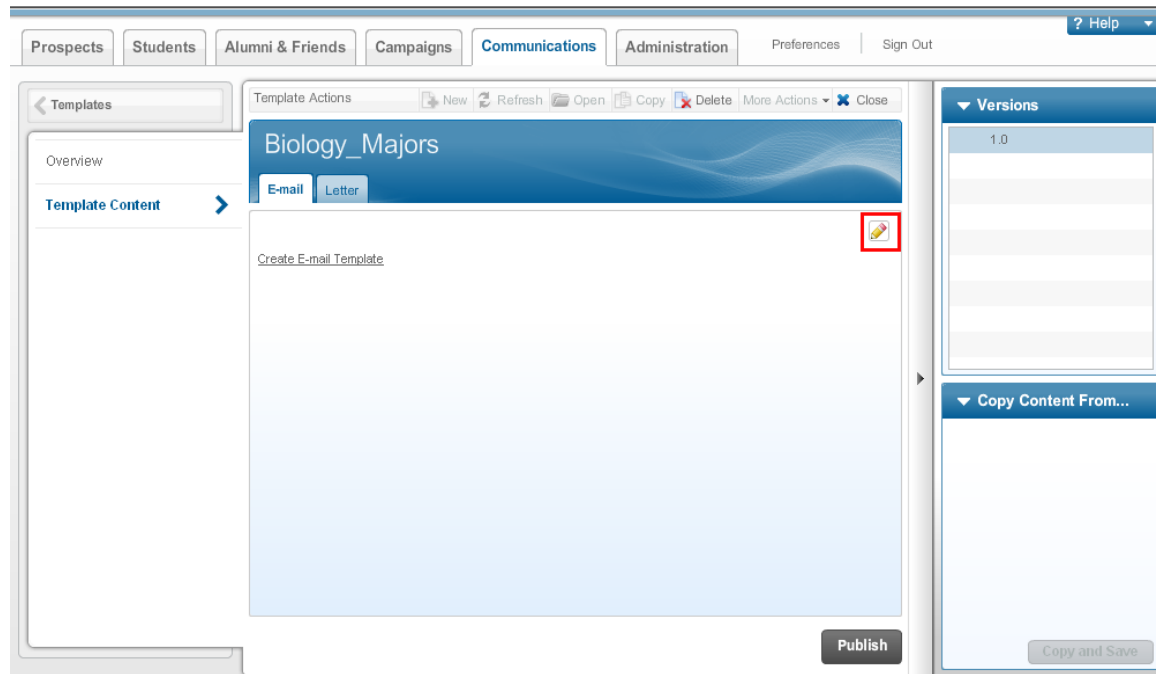
The Template Content tabs for E-mail, Letter and Targeted Announcement vary depending on the criteria selected in the Template Overview (see previous section for more detail).

Template Content view



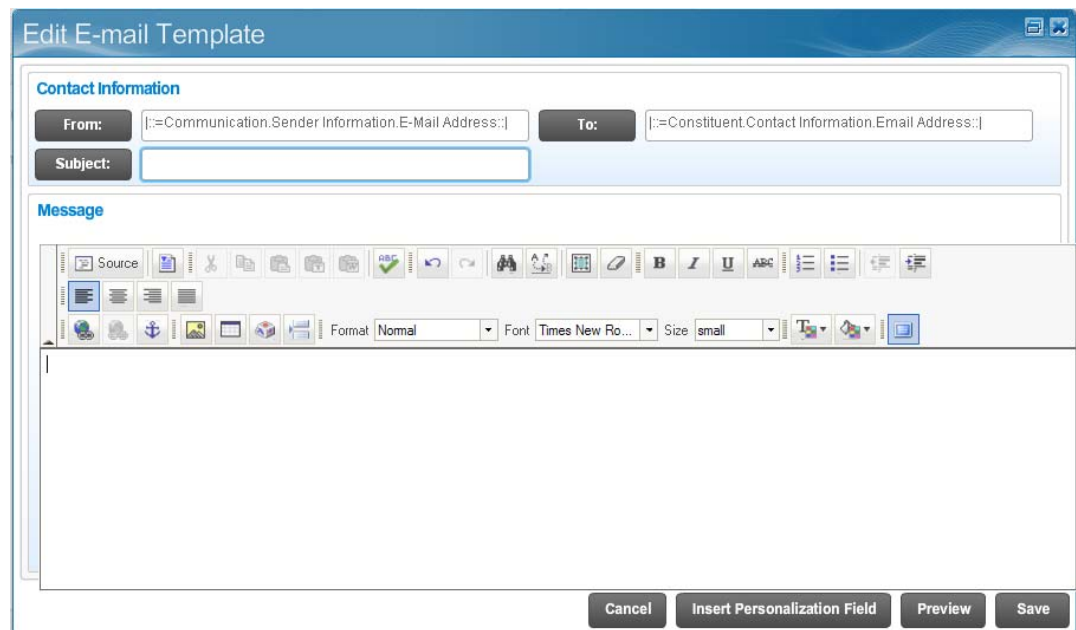
Creating or Editing Template Content

1. From the Communication view, double-click your selected template to open it.
2. Click the **Template Content** link to access the content page for the template. There will be one tab for each method of communication selected on the Overview view for the template.
3. To create or edit template content for the method of your choice, click the **Edit** () icon on its tab.

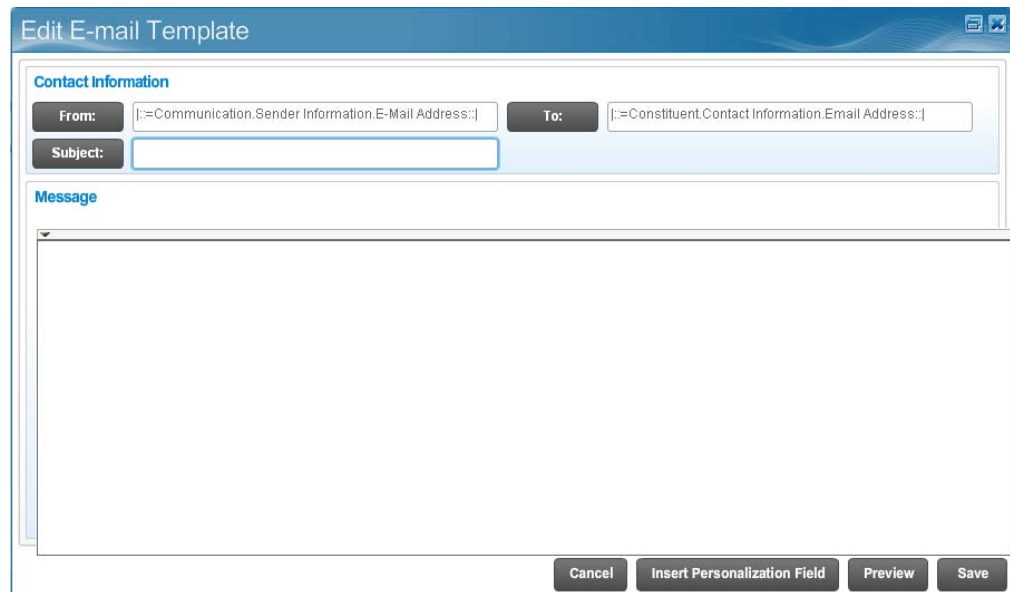


4. Click the **Create E-mail template** link.

5. The Template Editor Toolbar opens.



Or







The Template Editor Toolbar lets you enter text into the message body with a variety of formatting, including embedding of links, pictures and other files as needed.


The Template Editor Toolbar utilizes the power of FCK editor, which is a lightweight text editor to be used in web pages. Using this tool, a user can write text, format it, create tables, and so on. Template creation in Release 1.3 supports FCK editor version 2.6.3.1. Two significant new features include the ability to paste from Microsoft Word documents, and the ability to create and edit tables. The new version also offers you extended text

formatting options.

The template editor toolbar contains formatting tools that allow you to enhance and customize the appearance of a template as shown in this table:

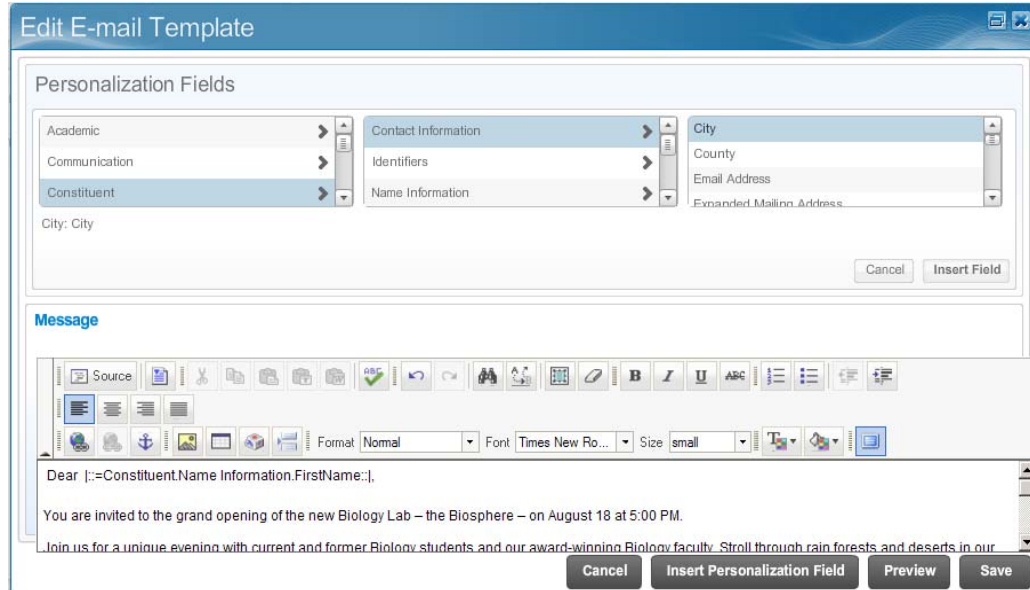
Available Tools	
 - View/Hide HTML source	 - Change selected text format to underline
 - Select a formatting template	 - Change selected text format to strike through
 - Cut selected elements from the template	 - Insert/Remove a numbered list
 - Copy selected elements to the clipboard	 - Insert/Remove a bulleted list
 - Paste items from the clipboard into the template	 - Decrease paragraph indent
 - Paste text from the clipboard into the template	 - Increase paragraph indent
 - Paste Microsoft Word content from the clipboard into the template	 - Apply left justification to selected text
 - Spell check the template	 - Apply center justification to selected text
 - Undo changes to the template	 - Apply right justification to selected text
 - Redo changes to the template	 - Apply block justification to selected text
 - Search the template content	 - Insert an HTML link
 - Replace template content.	 - Remove an HTML link
 - Select all items on the template	 - 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 toolbar functions can be found in Appendix B at the end of this workbook.

- To insert a personalization field into the message body, click **Insert Personalization Field** button.



- Select the fields to specify the required personalization elements which will be inserted into the body of your text. Click the **Insert field** button once selects have been made.
- You may add multiple personalization fields or click **Cancel** to return to viewing the **From:** **To:** and **Subject:** fields.
- If you click on the button for the **From:**, **To:** or **Subject:** field, the same personalization field boxes open up so that you may select a value for the field. You may also enter these fields manually.

10. Click **Preview** to preview what the content will look like when sent.

The screenshot shows a web interface titled "Edit E-mail Template". It contains a form with the following fields:

- From:** registrar@sungarduniv.edu
- To:** John.VonHorn@some.domain.com
- Subject:** Biology Lab Open House

The main body of the email preview contains the following text:

Dear John,

You are invited to the grand opening of the new Biology Lab – the Biosphere – on August 18 at 5:00 PM.

Join us for a unique evening with current and former Biology students and our award-winning Biology faculty. Stroll through rain forests and deserts in our six-story state-of-the-arts Biosphere.

Be one of the first to tour the new Biosphere at 330 University Avenue across from the Main Registration Building.

We look forward to seeing you there,

The Biology Department

RSVP by July 30 – Biology Dept. 555-1212

At the bottom right of the preview area, there are two buttons: "Go Back" and "Save".

11. Click the **Go Back** button to return to editing or the **Save** button to save your content and return to the Templates view.

Template versions

When existing templates are edited, a new version is automatically created. The different versions that have been saved may be accessed via the Versions box. This allows you to revert to older versions as needed. It also ensures that previous versions that are attached to a prospect's Interaction History are available to the system.

1. Click on the version number in the right hand box to see other versions of your template.

The screenshot shows a "Versions" box with a dropdown arrow and the title "Versions". It contains a list of versions:

Version	Status
1.1	
1.0	(Active)

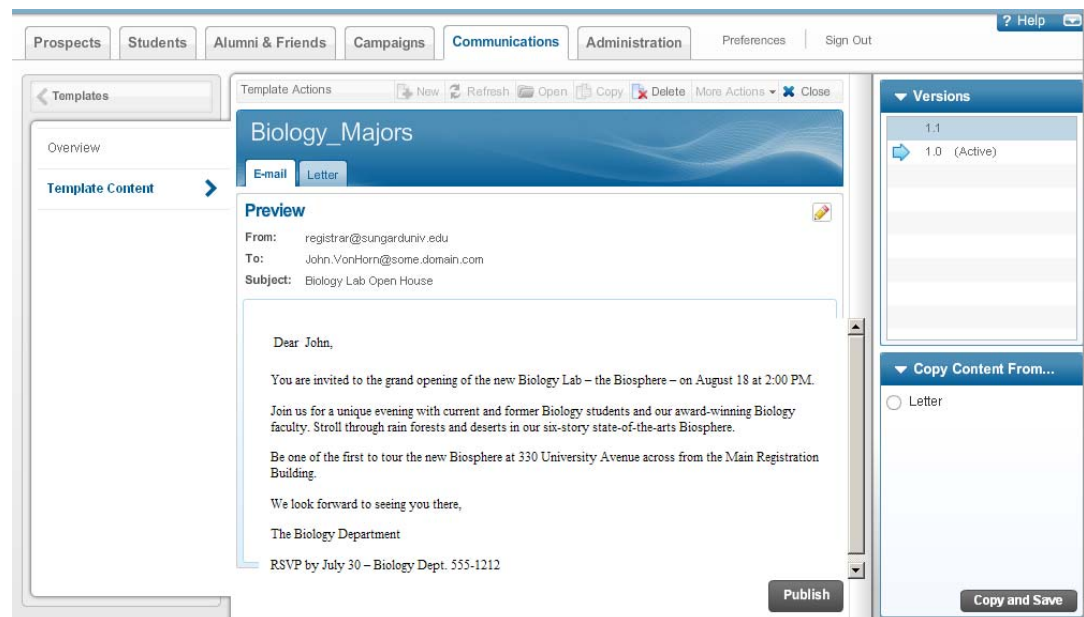
A blue arrow icon points to the "1.0 (Active)" version.

Coping content from another template type

The Copy Content From... box allows you to copy content from one method of communication to another within a template. It may be used when you have more than one method selected on the attributes page for the template.

1. Select the tab corresponding to the communication method that is the destination for the content you would like to copy.
2. In the **Copy Content From...** sidebar panel, select the communication method radio button that contains the content you would like to copy and click **Copy & Save**.

Note: Only content that is valid on this template type will be copied.




Publishing a Template

A published template contains the text and associated content that has been approved for distribution.

For a template to be used in a communication, that template must be both published and valid for use based on the date range of the template.

A campaign will always use the latest template version that has an active status. When a new version of a template is created and published, the prior version of the template will be deactivated and will not be available for use.

To publish a communication template, click the  button in the bottom right of the Template Content screen.

Using the Communication Log

Introduction

The Communication Log allows you to search for and review the details of an individual communication record. The Communication Log can be used to verify that a specific communication or group of communications was successfully processed during a specified date range.

Communication Log view

The screenshot shows the 'Communication Log' view within a software application. The top navigation bar includes tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications' (which is active), and 'Administration'. To the right of these tabs are links for 'Preferences' and 'Sign Out'. On the left side, there is a sidebar with a tree view containing 'Templates', 'Folders', 'Communication Log' (selected with a blue arrow), 'Output', and 'Data Fields'. The main content area has a title bar 'Communication Log Actions' with buttons for 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. Below this is a search bar with the text 'Search by Initiated By' and a magnifying glass icon. A search filter box displays 'Search Descriptions: Initiated By = Admin, Date Sent = Greater than Jul 26, 2010 12:00 AM'. Below the search bar is an 'Advanced Search' dropdown menu. The main area contains a table with the following data:

Date	Communication Method	Subject/Description	Initiated By	Template	Organization
Jul 27, 2010 1:47 PM	Letter	Letter sent using "Biolo	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	Letter	Letter sent using "Biolo	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	Letter	Letter sent using "Biolo	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	Letter	Letter sent using "Biolo	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	E-mail	Biology Lab Open Hous	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	E-mail	Biology Lab Open Hous	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 1:47 PM	E-mail	Biology Lab Open Hous	admin	Biology_Majors 1.1	Root Organization
Jul 27, 2010 10:20 AM	E-mail	Quick email	admin	Manual E-mail	Root Organization

At the bottom right of the table area, it says 'Displaying 9 rows.'

Searching for a communication log

1. Select the **Communication Log** link from the **Communications** tab.
2. Enter your search by initiator in the **Search** field and click the **Go** button.

Or

Click **Advanced Search** to select a combination of attributes, and enter your

attribute search criteria. When searching on attributes, any attribute that is not populated will be ignored.

3. Click the **Go** button to display the results of your search.

The communication logs that meet your search criteria display.

Communication Log Details window

The Communication Log Details window displays detailed information about the selected communication.

You can view all details about a communication including type, date, subject, and details about the message content.

Viewing communication log details

1. Select the **Communication Log** link from the **Communications** tab.
2. Search for the communication log that you would like to view details about.
3. Click the **Open** icon.

You have successfully viewed the details of a communication.

Exercise 1

You will create a series of templates for use in this exercise and later training activities.

1. Create a folder for your templates. Call the folder *YourLastName.Training*.
2. Place all of the templates you create during training in this folder.

(Note: Institutions that are not implementing the Prospective Student Portal can ignore the selection of the Targeted Announcement communication method in this exercise.)

3. Create a template called YOURLASTNAME.Admissions.Deadlines.
4. Specify **Targeted Announcements** as the communication method.
5. Set Access to Private.
6. Create the email template content first.
7. Provide a bulleted list of at least three key dates related to admissions.
8. Create the template content for targeted announcements and for the letter option.
9. Publish the template.
10. View the template in the list.

As this was created as a Private template, only you can use it. Other colleagues cannot see or use this template.

11. Change the template to Public.

Other colleagues will now be able to find and use this template.

Exercise 2

In this exercise, you will create a series of templates that you will use later in a campaign. Access on all of these must be set to Public.

1. Create a template called *YourLastName.Application.Begin*.
2. Specify E-mail, Letter, and Targeted Announcements as communication methods.
3. Provide content that encourages the prospect to apply to your institution.
4. Create a second template called *YourLastName.Application.Complete*.
5. Specify Letter and Targeted Announcements as communication methods.
6. Provide content that encourages applicants to complete their application.
7. Create a template called *YourLastName.Application.Thanks*.
8. Specify email as the communication method.
9. Provide content that thanks applicants for completing their application.
10. Go to the Prospects tab and search for one of the sample prospects your institution has created for your training activities.
11. Select the prospect and click the **Contact** button.
12. Select the **Use Template** link and send each of your templates to this prospect.
13. The method by which the prospect receives the communication will depend on
 - the prospect's profile (does s/he have a primary email address; a mailing address; a prospective student portal account;
 - the communication methods priorities your institution defined for Banner Enrollment Management (for example, email, then targeted announcements, then letters);
 - the communication methods you selected when you created each template.
14. Note any templates that your selected Prospect does not receive for investigation.

Exercise 3 - Working with Valid From Dates

1. Select your Application.Deadlines template.
2. Change the template's **Valid From Dates** to exclude today.
3. Select your sample recruit to contact using this template.
4. Search for this template. It should not appear in the list of available templates.
5. Change the template's **Valid From Dates** to include today.
6. Select your sample recruit to contact using this template.
7. Search for this template. It should appear in the list of available templates.

Exercise 4 - Using Templates with "Opt-Out" Profiles

1. Select your specified sample recruit's project from the **Prospects** tab.
2. Open **Contact** information to edit his/her email addresses.
3. Select the **Opt out from Mass Email** checkbox and save this change.
4. Click the **Contact** button and select **Use template**.
5. Select your Application.Deadlines template and send the template.

You should see a message indicating invalid data and referring you to the Communication log.
6. Open the Interactions link for your sample prospect.

You should not find a record of the communication here, since it was not delivered. (You will be able to confirm this through the Communication Log, discussed shortly.)
7. Open the prospect's email information and uncheck the **Opt out from mass email** checkbox.
8. Click the **Contact** button and select **Use template**.
9. Select your Application.Deadlines template and send the template.
10. The message should send successfully. Go to Interactions for your prospect and verify that the communication is listed there.
11. Select your Application.Deadlines template.
12. Change the template's **Active Dates** to exclude today.
13. Select a profile to contact using this template.
14. Search for this template. It should not appear in the list of available templates.
15. Change the template's **Active Dates** to include today.
16. Select a profile to contact using this template.
17. Search for this template. It should appear in the list of available templates.

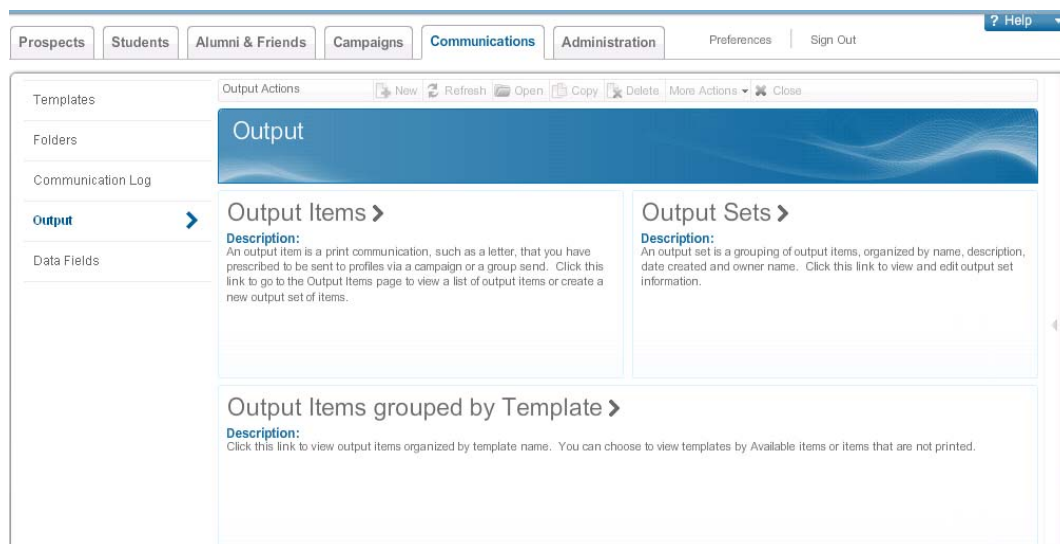
Working with Communication Output

Process Introduction

The Relationship Management workspace supports your efforts to produce, send, and download output communications. Communications output includes all communications to profiles via printable letters, comma-separated lists of addresses, and mailing labels that you've created as a result of campaigns and group sends. When you process a template that contains a printed component to a group of profiles, the system creates an output item for each individual in the group. You can group output items into output sets, organizing them by name, date, description, and owner name. You can specify the output sort options for a set to support bulk mailing. You can then generate PDF and CSV files from the workspace, and download them for review. You can view output items organized by the templates that authorized them. You can choose to view templates by Available items or items that are not printed.

To create output files, you need to have an appropriate role that gives you access to Communications and Output. The online help attached to the pages and windows of the module guides your efforts at each progressive step along the way, but let's walk through the output process here at a high level.

From the Communications menu, the **Output** page provides access to three areas within the Output module: **Output Items**, **Output Sets**, and **Output Items by Template**.



Viewing a List of output items

An output item is any communication by letter to a person or a group of profiles that you've created via a send to an individual, or by using Group Send, or via a Campaign. The system creates an output item for each intended recipient in the group or the population list associated with the campaign.

An output item destined for printing and mailing exists in one of three states: it's either Available, Reserved, or Printed. An item can be in only one state at a given time. An Available item is not yet part of any output set, and is not marked as Printed; a Reserved item has not yet been printed but has been selected for one or more output sets; a Printed item has been marked as Printed/Complete. An output item can move between Available and Reserved many times, but once an item is in Printed state, it cannot be changed.

The screenshot shows the 'Output Items' page in a software application. The page has a navigation bar at the top with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. The 'Output Items' page is active, showing a table of output items. The table has columns for Date, Last Name, First Name, Template Name, Version, Initiated By, and Campaign Name. The table displays 10 rows of data, all with a date of Jul 25, 2010 and a template of Biology Open. The page also includes a search bar, a 'Search Descriptions' field, and a 'Profile Summary' sidebar.

Date	Last Name	First Name	Template Name	Version	Initiated By	Campaign Name
Jul 25, 2010	Amaker	Rex	Biology Open	1.0	admin	
Jul 25, 2010	Allen	Sydney	Biology Open	1.0	admin	
Jul 25, 2010	Babiarz	Deandra	Biology Open	1.0	admin	
Jul 25, 2010	Balfour	Roxanna	Biology Open	1.0	admin	
Jul 25, 2010	Baysinger	Dee	Biology Open	1.0	admin	
Jul 25, 2010	Athans	Gail	Biology Open	1.0	admin	
Jul 25, 2010	Avant	Divina	Biology Open	1.0	admin	
Jul 25, 2010	Berisford	Nathaniel	Biology Open	1.0	admin	
Jul 25, 2010	Almquist	Kacie	Biology Open	1.0	admin	
Jul 25, 2010	Blackstone	Yee	Biology Open	1.0	admin	
Jul 25, 2010	Ayuso	Danial	Biology Open	1.0	admin	
Jul 25, 2010	Bouffard	Buena	Biology Open	1.0	admin	
Jul 25, 2010	Berenson	Brenton	Biology Open	1.0	admin	

Use the **Output Items** page to view a list of output items.

Creating an output set

An output set is a convenient way to manage production for a single item, or for multiple related items for batch processing. You provide a name and description for the output set group. The system identifies you as the creator of the set. Any person with the appropriate output edit permissions has authority to add or remove items within the set before printing. To produce output from the set, you sort the items according to your selected criteria, and specify the type or types of output you desire -- either pdf, comma-separated address list, or mailing label.

Use the following procedure to create an output set:

1. Using the **Output Items** search page, search for the output items you wish to process. The system responds with a list of output items that match your search criteria, with descriptive information for each item. Select a row to view profile summary information in the sidebar.
2. Click the **Create Output Set** button.
3. In the **Output Set** dialog box, enter a name and the description for the output set. You can view the search descriptions.



The screenshot shows a software dialog box titled "Output Set". Inside the dialog, there is a section titled "Define Output Set". This section contains two text input fields. The first field is labeled "Name: *" and contains the text "INQ Fulfillment". The second field is labeled "Description:" and contains the text "INQ fulfillment letter to go with campus brochure". At the bottom of the dialog, there are two buttons: "Create Set" and "Cancel".

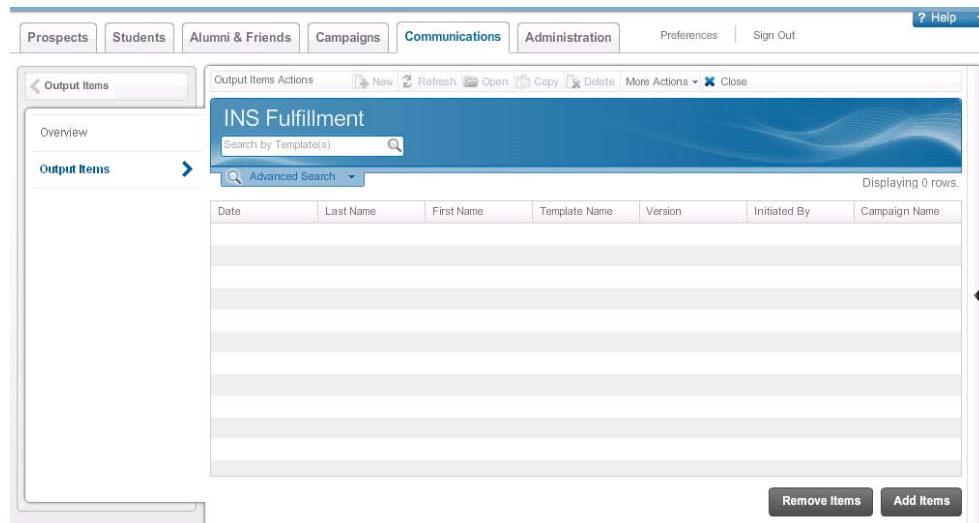
4. Click **Create Set** when you are satisfied with your description. The system presents the **Output Set Overview** page, where you can edit the name and description of the set.

Adding items to an output set

You can add one or more output items manually to an output set after you create it. Select the Output Items page and use the Add Items window to search for the item or items you wish to add. The default search is Search by Template.

Use the following procedure to add or remove output items within a set:

1. From the **Output Items** page, click **Add Items**.



2. On the **Add Items to Output Set** window, search for the item or items you wish to add to the output set. The default search is Search by Template.

Search by Template(s)

Advanced Search

Displaying 0 rows.

Date	Last Name	First Name	Template Name	Initiated By	Campaign Name
------	-----------	------------	---------------	--------------	---------------

Cancel Add All Items Add Selected

3. Select the item or items you wish to add to the set.
4. Click **Add All Items** to add all displayed items to the set.
5. Click **Add Selected Items** to add only your highlighted items to the set.
6. To view an item's profile information, select a row, then click **More Actions** drop-down arrow on the toolbar, and select **View Profile**.
7. To remove all items from the output set, click More Actions drop-down arrow on the toolbar, and select **Remove All**.

Generating an output file from an output set

From the **Output Set Overview** page, you can choose to generate files for the output set and select the output mode in which to generate your files. You may select output file types of PDF, Address CSV, and Personalization Fields CSV. If you select PDF, you can enter the output file size, and the number of items per PDF. You can also select the sort order for the items, choosing one or more sort options.

Generate Output File

Name: * Bio_Lab_Open

Output File Type: ☒ PDF ☐ Address CSV ☐ Personalization Fields CSV

Split Number: 500

Sort Options:

Nation	Ascending
Zip	Ascending
Last Name	Ascending
First Name	Ascending

Cancel Submit

Whether generating a PDF, Address CSV and/or Personalization Fields CSV, you follow the same overall process. We'll use PDF in this example, you can choose to generate files for the output set and select the output mode in which to generate your files. You may select output file types of PDF, Address CSV, and Personalization Fields CSV. If you select PDF, you can enter the output file size, and the number of items per PDF. You can also select the sort order for the items, choosing one or more sort options.

Whether generating a PDF, Address CSV and/or Personalization Fields CSV, you follow the same overall process. We'll use PDF in this example.

1. Open an existing output set. The system presents the **Output Set Overview** page, which contains the Edit icon, and two buttons at the bottom of the page, **Generate** and **Mark Complete**. A third button, **Download**, appears only if the set has been previously generated.

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

Output Set Actions: New Refresh Open Copy Delete More Actions Close

Biology_Lab_Opening

Overview

Description:

Date Created: 07/25/2010

Created By: admin

Count: 54

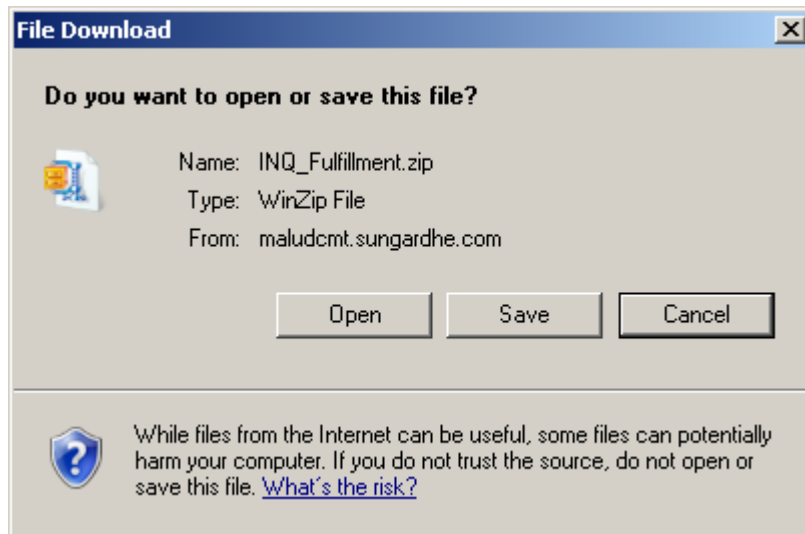
Mark Complete Download Generate

2. Select **Generate**. The system presents a dialog window, in which you can specify a name for the file. Choose one or more file output types -- PDF, Address CSV and/or Personalization Fields CSV. If you select PDF, you can define the Split Number for the file. Finally select the sort order for the files -- by Nation, Zip Code, Last Name or First Name.
3. Click **Refresh** on the toolbar. The system presents the **Set Overview** page showing **Generation Status** as in progress or complete. If the status is in progress, click Refresh again until the process is complete. Now the **Download** button is enabled and available, and you can download the

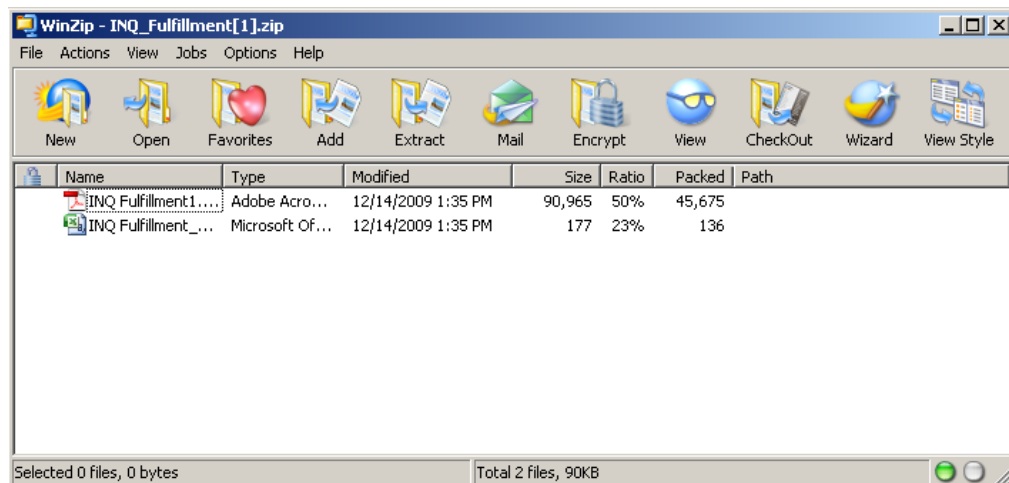
file.



- On the **Set Overview** page, click **Download**. The system presents a window confirming that download is successful.



- Open the PDF file and verify that the number of items in the PDF matches the number in the set, and that its size is within acceptable limits. Also check that the sort order is as you defined it. If you've downloaded an Address CSV file, check that the number of columns is right, and that the sort order is consistent with what you selected.



- If all is well, you can mark the set as Complete. On the **Overview** page, click **Mark Complete**. The system presents a confirmation area. If you respond **Yes**, the system sets the status of all items in the set to **Complete**.

Reviewing report

You can use the **Output Items by Template** page to review one of two reports on output items.

The first report provides an aggregate view of all available items by template -- that is, any item that is not in an output set and is not already printed. The second report provides a view of all unprinted items by template, whether it is in a set or not. You can toggle between reports, and filter your results. These reports help you identify any items that have not been printed after a certain amount of time. Items marked as **Not Printed** indicate that at least one member item of the set has not been printed, allowing you to locate sets which may have only partially printed, with items having been added after an initial mark as printed.

The screenshot shows a web application interface with a top navigation bar containing tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications (selected), Administration, Preferences, and Sign Out. A Help dropdown is on the right. On the left, a sidebar shows 'Output' with sub-links for Output Items, Output Sets, and 'Output Items by Template' (selected). The main content area has a title bar with 'Output Items Actions' and icons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this is a header 'Output Items by Template'. A section titled 'View Templates By:' contains two radio buttons: 'Available Items' and 'Items Not Printed' (selected). Below the radio buttons is a dropdown menu showing '0' and a 'Days Old' label. 'Reset' and 'Go' buttons are on the right. Below this is a table with the following data:

Template Name	Version	Description	Count of Items Not Printed
Biology Open House	1.0	Open House for Biology majors	147

Below the table, it says 'Displaying 1 row.'

Creating Personalization Fields



Section goal

The goal of this section is to provide the knowledge and practice to create custom personalization data fields which can be used in communication templates.

Objectives

In this section you will learn how to:

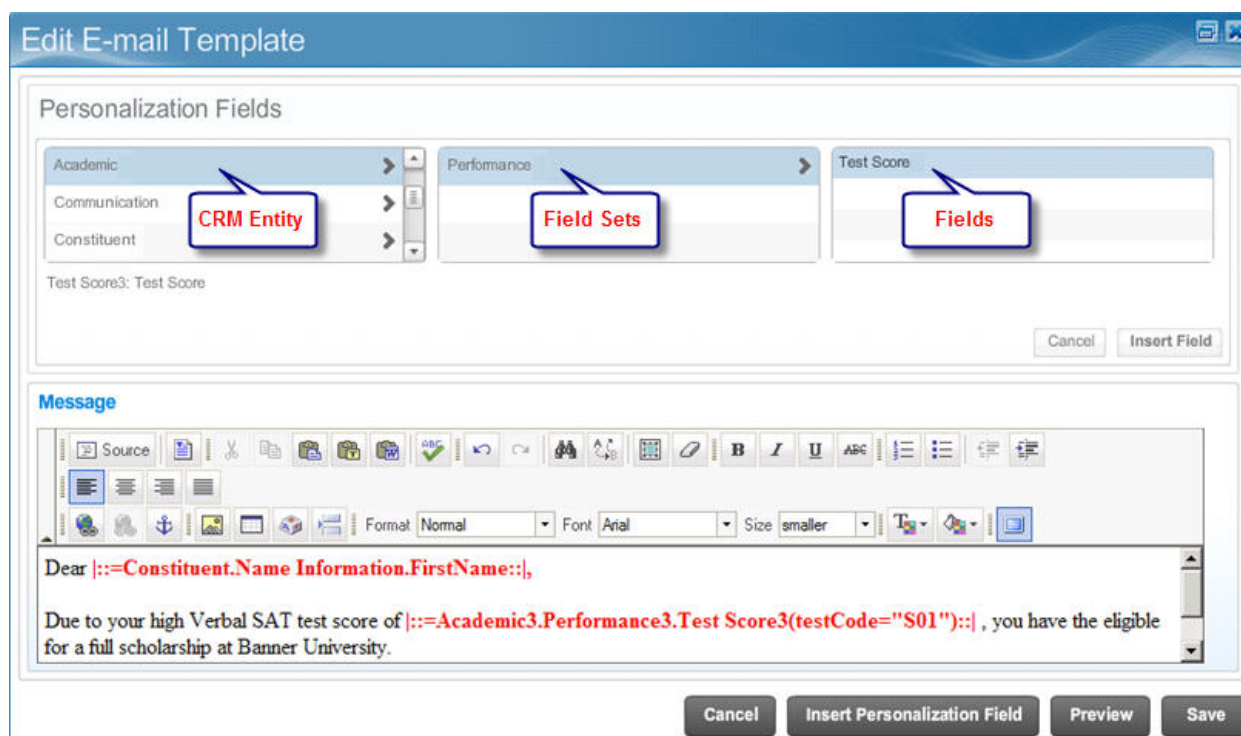
- create a new CRM entity
- create a new field set
- create a new personalization field
- format a data field
- add and mapping parameters
- perform a field test
- publish a data field
- deactivate and delete a data field.

Personalization Data Fields Hierarchy

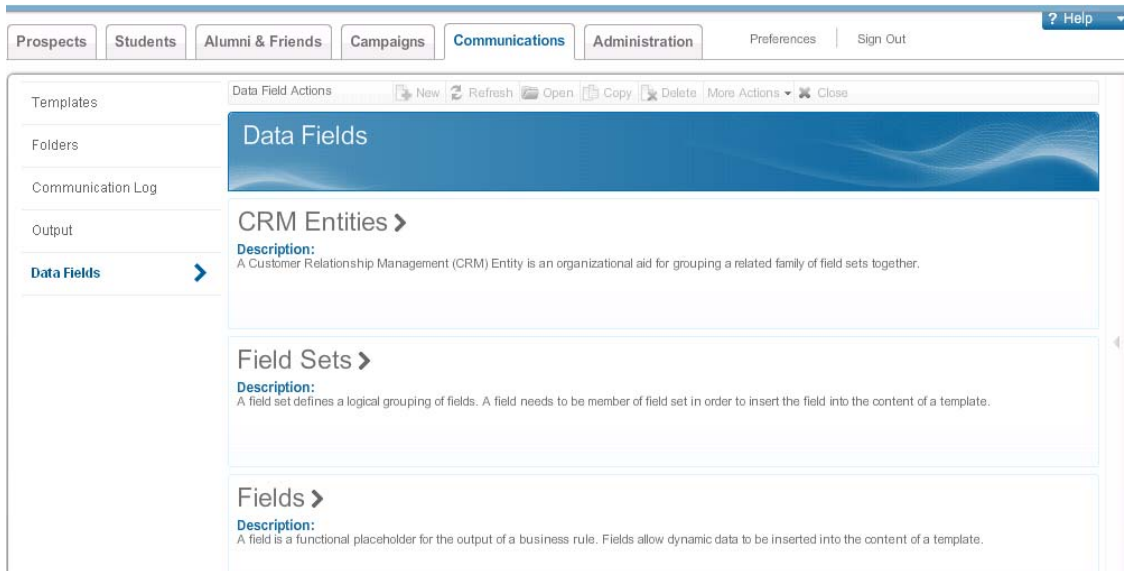
Process Introduction

The Relationship Management workspace supports your effort to create and organize relevant data and data fields that populate the content template. These fields are organized into three groups; CRM Entity, Field Sets and Fields. These three group categories are used in the Personalization Fields.

The graphic below demonstrates the data structure in Relationship Management and is utilized in the Personalization fields. You will see this structure when inserting Personalization fields into an e-mail template.



From the **Communications** tab, the **Data Fields** page provides access to three areas within the Data Fields module; CRM Entity, Field Sets, and Fields.



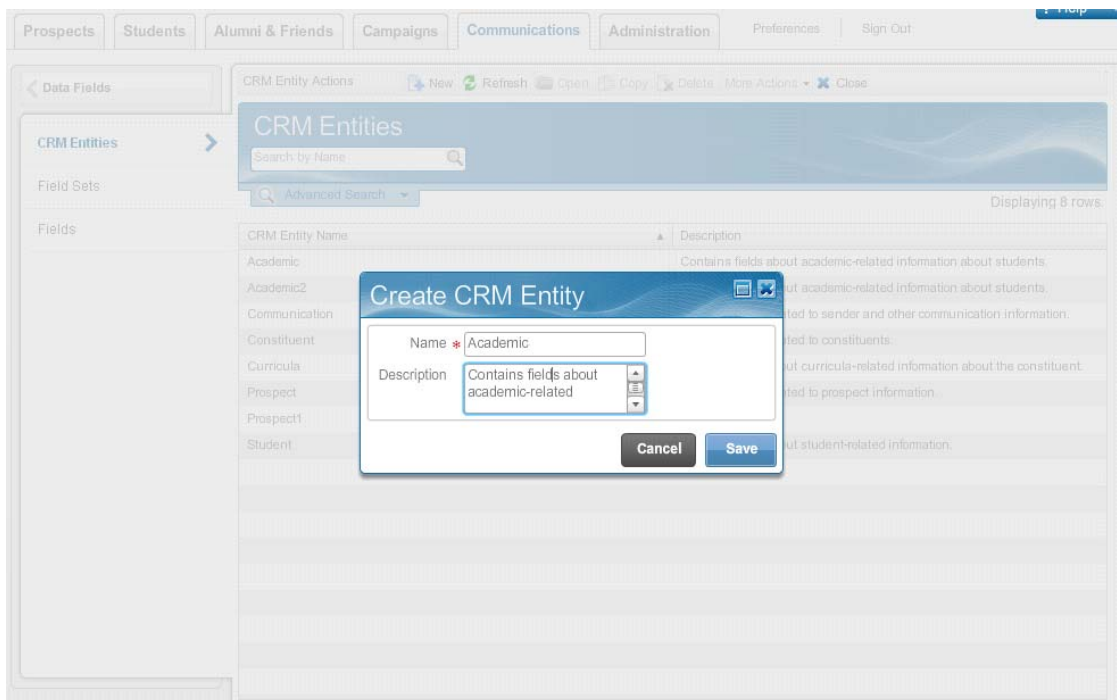
Creating a New CRM Entity

Introduction

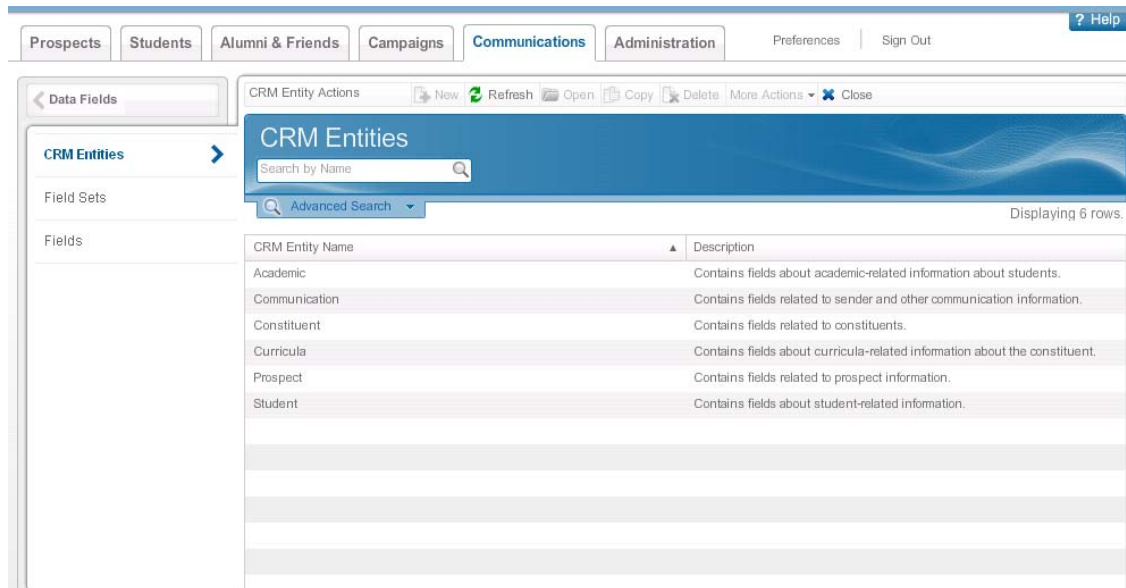
A Customer Relationship Management (CRM) Entity allows your institution to organize and group Field Sets. The CRM Entities listed below are delivered with Banner Relationship Management.

- Academic
- Communication
- Constituent
- Curricula
- Prospect
- Student

New CRM Entities can be created to group Field Sets that are relevant to your institution.




Viewing a list of CRM Entities



Use the CRM Entities page to view a list of CRM Entities.

Creating a new CRM Entity


Use the following procedure to create a new CRM Entity.

1. Using the CRM Entities page, click the **New**  icon.
2. Enter a name for the CRM Entity in the **Name** field.

The dialog box is titled 'Create CRM Entity'. It has two input fields: 'Name' with a red asterisk indicating it is required, and 'Description'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Enter a description of the CRM Entity in the **Description** field.
4. Click **Save**.

Editing a CRM Entity

1. From the CRM Entity page, double-click on your desired CRM Entity to open it.
2. Click the **Edit**  icon to edit the CRM Entities fields.
3. Make the desired changes.
4. Click the **Save** button.

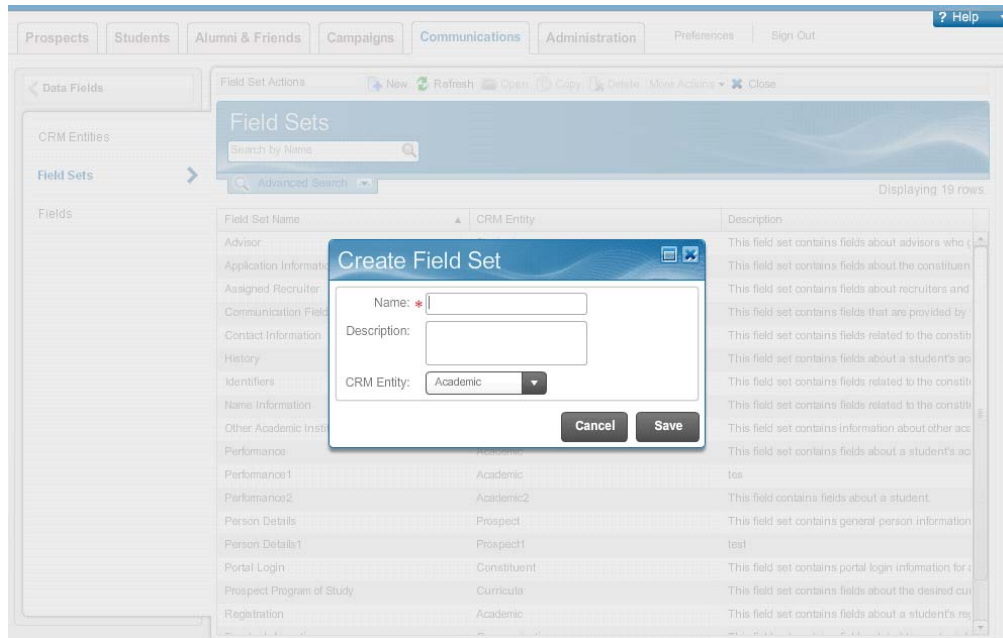
Creating a New Field Set

Introduction

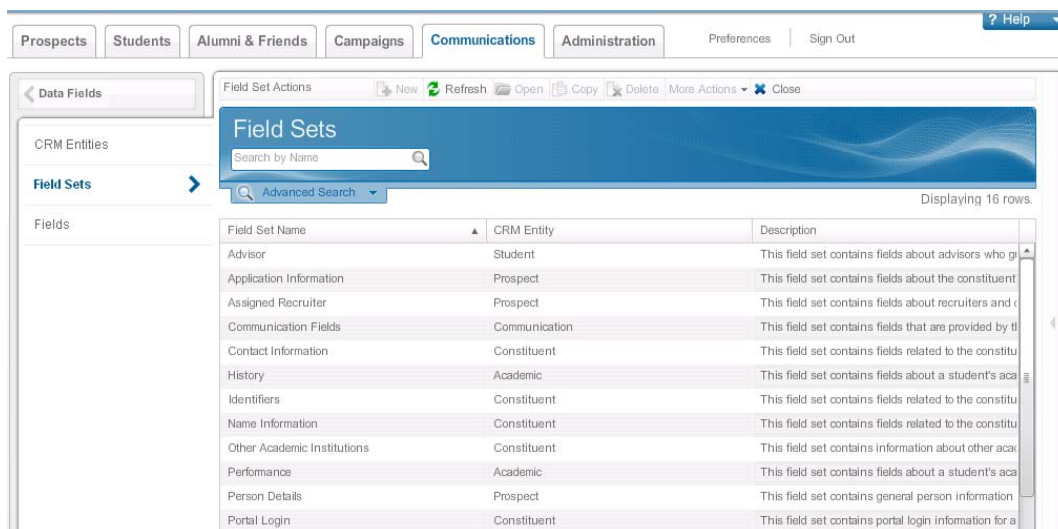
Field Sets organize data fields at your institution. Each Field Set is associated with an existing CRM Entity. The Field Sets listed below are delivered with Banner Relationship Management.

- Advisor
- Application Information
- Assigned Recruiter
- Communication Fields
- Contact Information
- History
- Identifiers
- Name Information
- Other Academic Institutions
- Performance
- Person Details
- Portal Login
- Prospect Program of Study
- Registration
- Sender Information
- Student Program of Study

New Field Sets can be created to group fields that are relevant to your institution.




Viewing a list of Field Sets

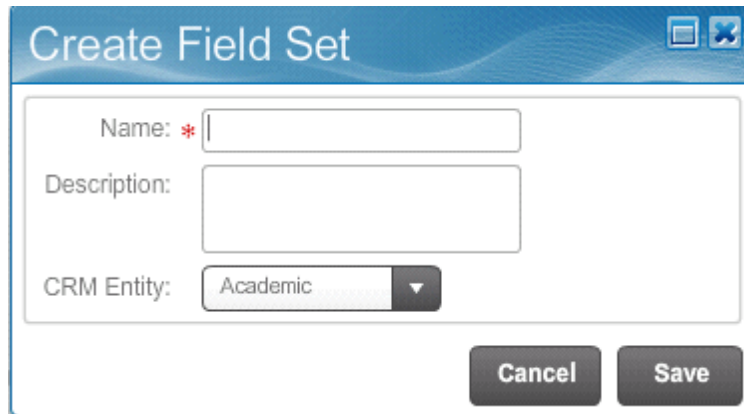


Use the Field Sets page to view a list of existing Field Sets.

Creating a new Field Set

Use the following procedure to create a new Field Set.


1. Using the Field Set page, click the **New**  icon.
2. Enter a name for the Field Set in the **Name** field.



The image shows a 'Create Field Set' dialog box. It has a title bar with the text 'Create Field Set' and two window control icons. Inside the dialog, there are three input fields: 'Name:' with a red asterisk, 'Description:', and 'CRM Entity:' with a dropdown arrow. The 'CRM Entity' dropdown is currently set to 'Academic'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Enter a description for the CRM Entity in the **Description** field.
4. Click the CRM Entity drop-down arrow and select the CRM Entity to associate it with the Field Set.
5. Click **Save**.

Editing a Field Set

1. From the Field Sets page, double-click on your desired Field Set to open it.
2. Click the **Edit**  icon to edit the Field Set field.
3. Make desired changes.
4. Click the **Save** button.

Creating a Personalization Field

Introduction

Personalization fields are functional placeholders for the output of a business rule and allow dynamic data to be inserted into the content of a template. In addition, fields can be associated with a Rule URI to return specific data.

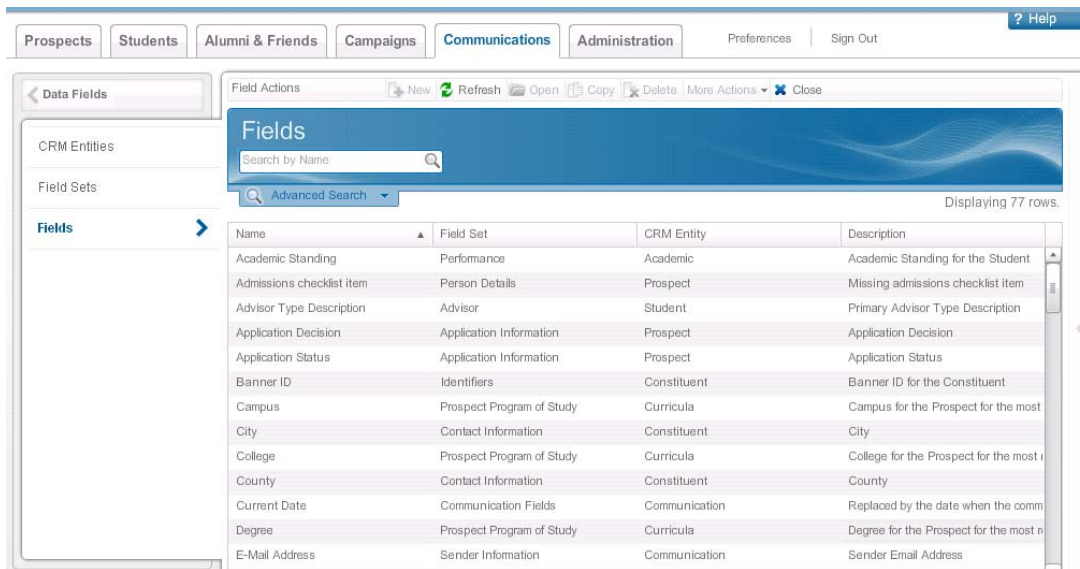
Viewing a list of Fields

The screenshot shows a web application interface for managing fields. A 'Create Field' dialog box is open, allowing the user to define a new field. The dialog box contains the following information:

- Name: * Test Score
- Description: Test Score
- Type: * Text
- Field Set: * Performance
- Rule URI: MCC-CommunicationFields.TestScore
- Preview Value: 1175


The background shows a table of existing fields. The table has columns for Name, Description, and other details. The table is displaying 82 rows.

You can use the Field page to view a list of Field Sets.



Creating a new Field

Use the following procedure to create a new Field.

1. Using the Field page, click the **New**  icon.
2. Enter a name for the Field Set in the **Name** field.

3. Enter a description of the CRM Entity in the **Description** field.
4. Click the **Type** drop-down arrow and select the Type.


Note: You can select HTML or Text.

5. Click the **Field Set** Look Up icon and associate an existing Field set with the Field.
6. Click the **Rule URI** Look Up icon and select an existing Rule URI.
7. Enter a preview value in the **Preview Value** field.

Note: This is a placeholder for the dynamic data that is inserted.

8. Click the **Save** button.
9. If the Field contains parameters and mapping associated with the business rule, click the **Next** icon.
10. Click the **Save** button.

Editing a Field Set

1. From the Field Overview page, double-click on your desired Field to open it.
2. Click the **Edit**  icon to edit the Field Set field.
3. Make the desired changes.
4. Click the **Save** button.

Formatting a Data Field

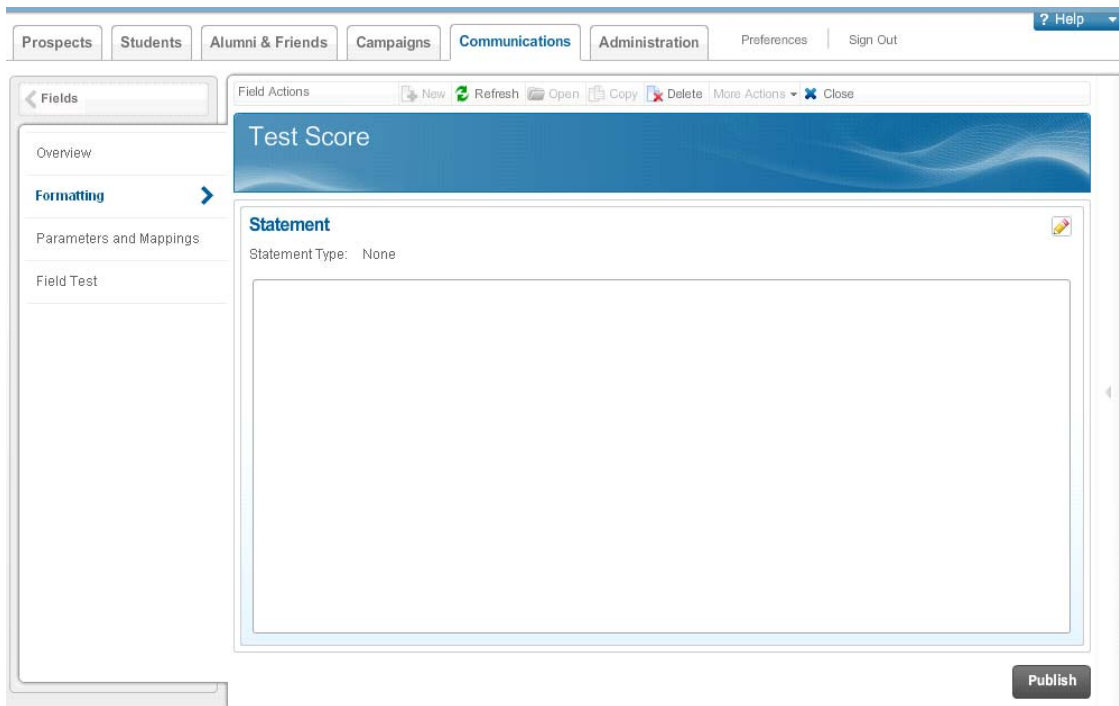
Introduction

You can use data field formatting to customize the display or appearance of a data field that is used in the Personalization Fields.

The Relationship Management application utilizes two types of data field formatting.

- Groovy Statement - object oriented scripting dynamic language akin to Ruby that uses Java syntax
- Formatted String - replaces one or more format items in a specified string with a string representation of a specified object.

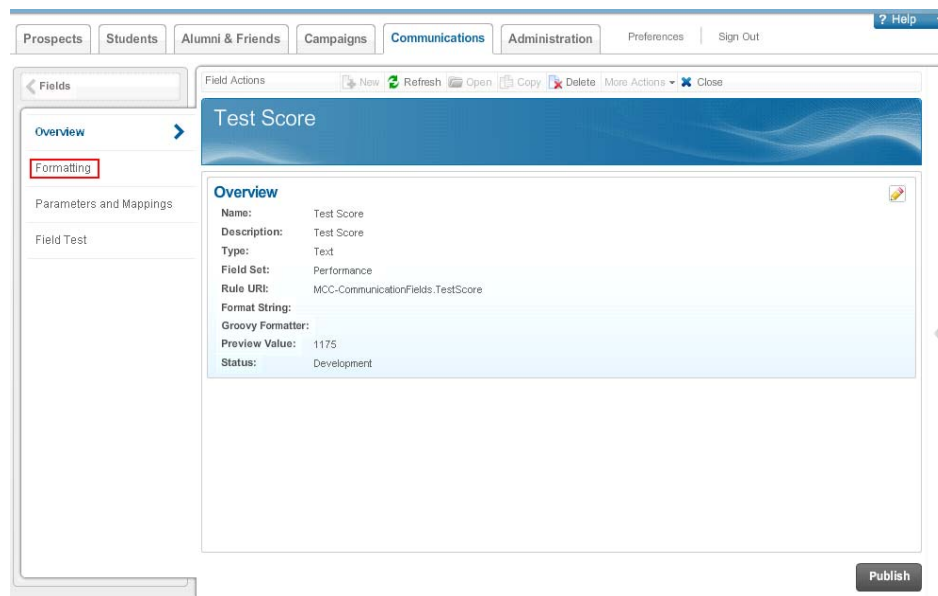
The Formatting functionality can be accessed within the Fields workspace. To access the Formatting workspace, click Fields on the Data Fields workspace, search and select the specific field, and open the field.




Steps

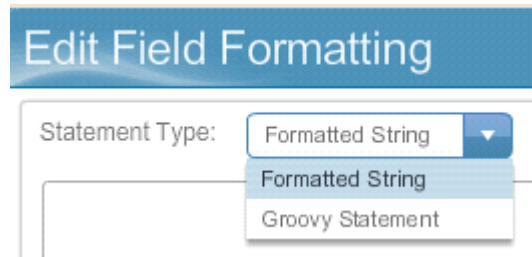
Use the following procedure to format a data field.

1. In the **Communication** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. Click the **Formatting** link.

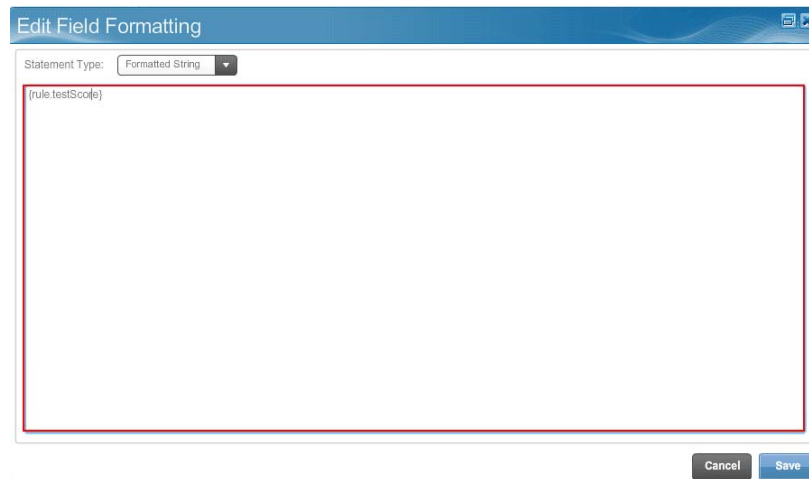


5. Click the **Edit**  icon.
6. In the Edit Field Formatting window, click the **Statement Type** drop-down arrow and select the statement type.

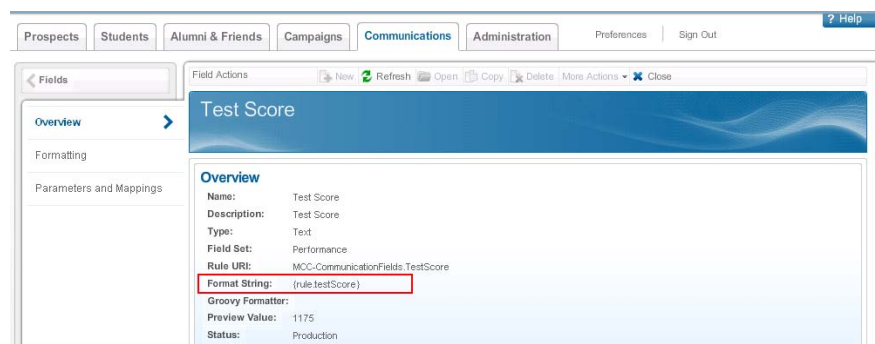
Note: You have the option of using the Formatted String or Groovy Statement to format a data field.



7. Enter the Formatted String or Groovy Statement in the text box.



8. Click **Save** to save changes and close the Edit Field Formatting window.
9. Click the **Overview** link to view the formatting changes added to the Overview page.



Adding and Mapping Parameters

Introduction

The Parameters and Mapping functionality allows your institution to manage the associated data field parameters and map a parameter with an existing rule argument. The Parameters and Parameters Mapping are displayed in two separate sections on the same workspace and are edited separately.

The Parameters and Mappings functionality can be accessed within the Fields workspace. To access the Parameters and Mapping workspace, click Fields on the Data Fields workspace, search and select the specific field, and open the field.

The screenshot shows a web application interface for configuring a field named 'Test Score'. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications (selected), Administration, Preferences, and Sign Out. A Help icon is also present. Below the navigation bar, a sidebar on the left contains links for Fields, Overview, Formatting, Parameters and Mapping... (selected), and Field Test. The main workspace is titled 'Test Score' and contains two sections: 'Parameters' and 'Parameter Mappings'. The 'Parameters' section has a table with columns 'Parameter Name' and 'Description', containing one entry 'testCode'. The 'Parameter Mappings' section has a table with columns 'Parameter Name', 'Direction', and 'Rule Argument', containing one entry mapping 'testCode' to 'testCode' with a right-pointing arrow in the Direction column. A 'Publish' button is located at the bottom right of the workspace.

Parameter Name	Description
testCode	

Parameter Name	Direction	Rule Argument
testCode	→	testCode

Steps

Use the following procedure to format a data field.

1. In the **Communications** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. Click the **Parameters and Mapping** link.

5. In the Parameters section, click the **Edit** icon.

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

Fields

Overview
Formatting
Parameters and Mapping...
Field Test

Field Actions New Refresh Open Copy Delete More Actions Close

Test Score

Parameters

Parameter Name	Description
testCode	

Parameter Mappings

Parameter Name	Direction	Rule Argument
testCode	→	testCode

Publish

6. Click in the **Parameter Name** field and enter a parameter name.
7. Click in the **Description** field and enter a description for the parameter.
8. Click the **Save** button to save added fields and close the Parameters window.
9. Click the **Edit** icon in the Parameter Mappings section.

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

Fields

Overview
Formatting
Parameters and Mapping...
Field Test

Field Actions New Refresh Open Copy Delete More Actions Close

Test Score

Parameters

Parameter Name	Description
testCode	Test score code

Parameter Mappings

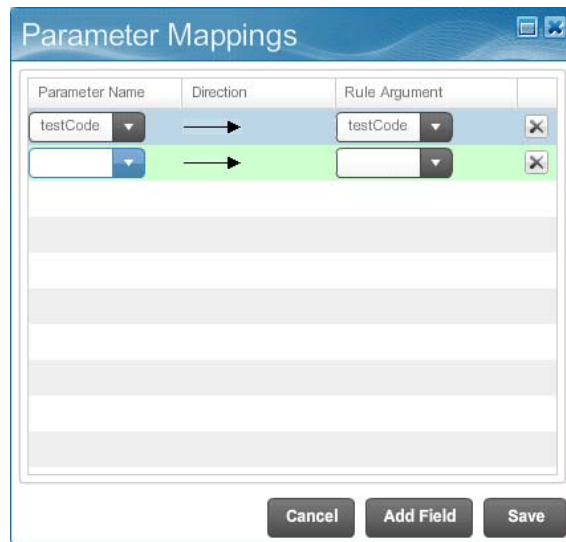
Parameter Name	Direction	Rule Argument
testCode	→	testCode

Publish

10. To add a parameter to a rule argument, click the **Edit** icon in the Parameters

Mappings section.

11. Click the **Add Field** button.



The image shows a 'Parameter Mappings' dialog box. It contains a table with three columns: 'Parameter Name', 'Direction', and 'Rule Argument'. The first row is highlighted in blue and contains 'testCode' in the first column, a right-pointing arrow in the second column, and 'testCode' in the third column. The second row is highlighted in green and contains an empty dropdown in the first column, a right-pointing arrow in the second column, and an empty dropdown in the third column. Below the table are several empty rows. At the bottom of the dialog are three buttons: 'Cancel', 'Add Field', and 'Save'.

Parameter Name	Direction	Rule Argument
testCode	→	testCode
	→	

Cancel Add Field Save

12. Click the **Parameter Name** drop-down arrow and select a parameter name.

13. Click the **Rule Argument** drop-down arrow and select a rule argument.

14. Click the **Save** button to save changes and close the Parameters Mapping window.

Performing a Field Test

Introduction

Once a CRM Entity, Field Set and Field has been created, the following information has been established between the three entities;

- associations between the CRM Entity, Field Set and Fields have been established
- root organization has been selected
- URI Rules have been selected
- formatting has been established
- parameters and parameter mapping is established (optional)
- the field has been published. (optional)

Then the field can be tested for accuracy from the Banner Relationship Management application. Testing confirms that the correct data and data formatting was accurately entered and displayed.

To start testing a Field, the value(s), parameter(s) and input parameter(s) will need to be specified. The parameter values will simulate the values that are mapped to the rule argument. A Field Test can be performed before and after a field is published.

The Field Test functionality can be accessed within the Fields workspace. To access the Field Test workspace, click Fields on the Data Fields workspace, search and select the specific field, and open the field.

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications (selected), Administration, Preferences, and Sign Out. A Help icon is on the far right. Below the navigation bar, a left sidebar shows a tree view with 'Fields' selected, containing sub-items: Overview, Formatting, Parameters and Mappings, and 'Field Test' (highlighted with a blue arrow). The main content area is titled 'Test Score' and has a toolbar with 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. Below the toolbar are two look-up fields: 'Target Name' and 'Organization', both marked with a red asterisk and a search icon. The 'Parameters' section contains a table with two columns: 'Parameter Name' and 'Input Value'. The first row has 'testCode' in the first column and is empty in the second. Below the table is a 'Results' section, which is currently empty. At the bottom right of the main area are three buttons: 'Reset', 'Test', and 'Publish'.

Steps

Use the following procedure to create a new CRM Entity.

1. In the **Communications** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. Click the **Field Test** link.
5. Click the **Target Name** Look Up icon and enter a search and select a constituent in the Constituent Search window.
6. Click the **Organization** Look Up icon and select an organization.

7. Click in the **Input Value** field and enter an input code(s) for the parameter.

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. A 'Help' button is on the right. Below the navigation bar is a sidebar with a 'Fields' section containing links: Overview, Formatting, Parameters and Mappings, and Field Test (which is selected and highlighted with a blue arrow). The main content area is titled 'Test Score' and has a 'Field Actions' bar with buttons: New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this, there are two dropdown menus: 'Target Name' (set to 'Owens') and 'Organization' (set to 'Root Organization'). The 'Parameters' section contains a table with two columns: 'Parameter Name' and 'Input Value'. The first row has 'testCode' in the first column and an empty text box in the second column, which is highlighted with a red border. Below the parameters table is a 'Results' section, which is currently empty. At the bottom right of the interface are three buttons: 'Reset', 'Test', and 'Publish'.

8. Click the **Test** button to view results in the Results section.

This screenshot shows the same 'Test Score' interface as the previous one, but after clicking the 'Test' button. The 'Parameters' table now has 'S01' entered in the 'Input Value' column for 'testCode'. The 'Results' section, which was previously empty, now displays the value '1053' and is highlighted with a red border. The 'Reset', 'Test', and 'Publish' buttons remain at the bottom right.

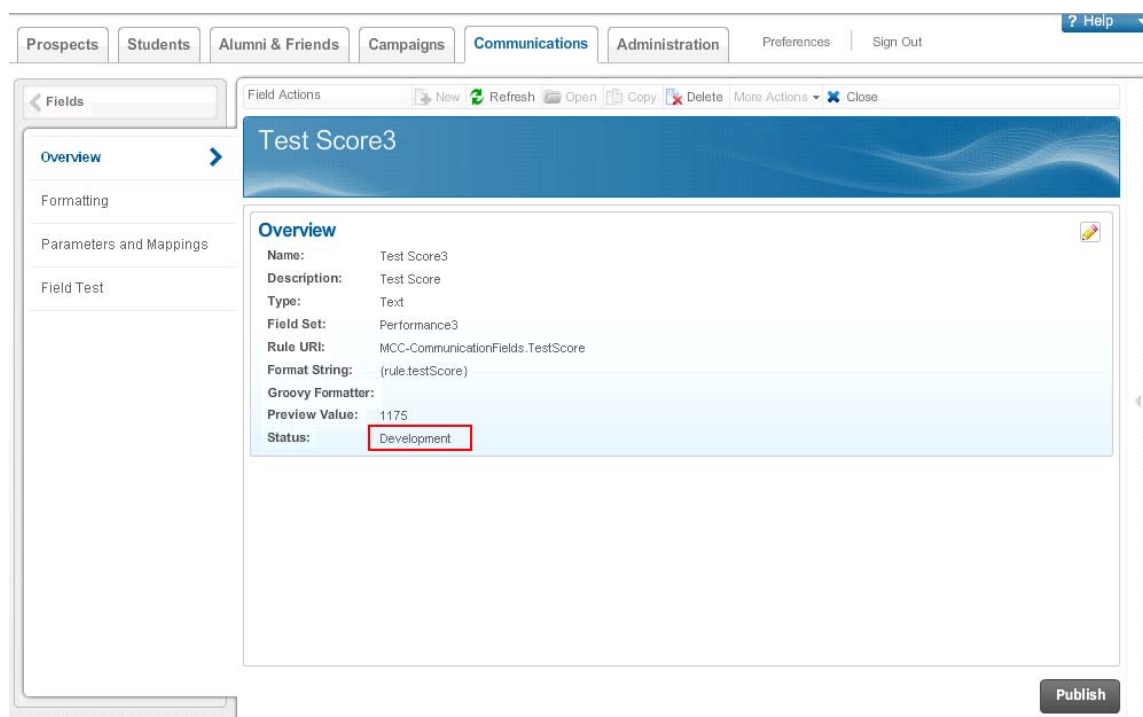
9. Click the **Reset** button to clear input data and results.

Publishing a Data Field

Introduction

The publish functionality activates a field and allows users to include personalized information in a communication. Once a field is published, the status changes from Development to Production and is available for use in the Personalization Fields located in the content template. At this point, the field cannot be changed back to the Development status.

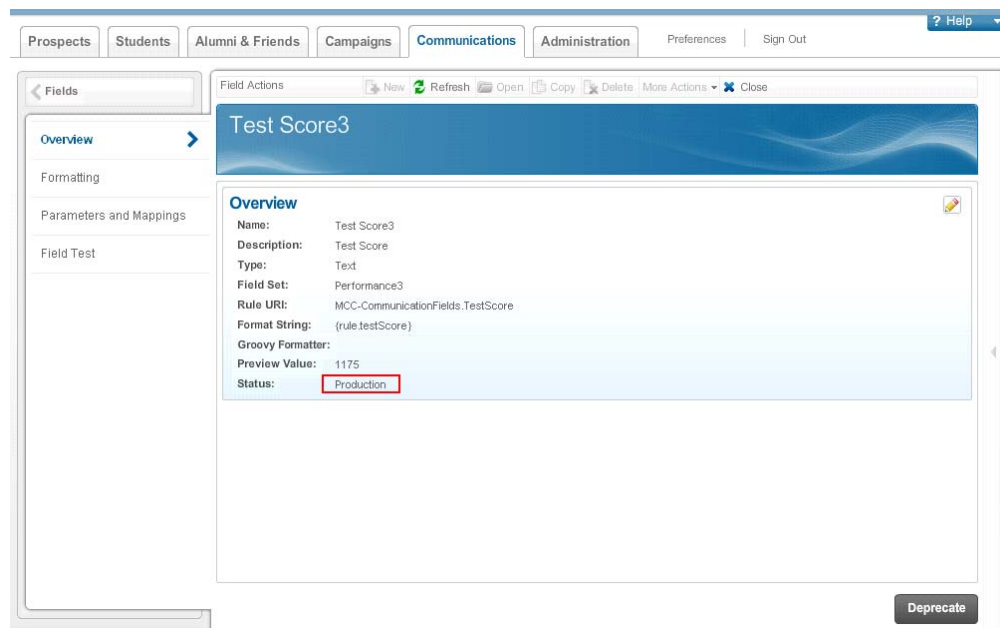
You can publish a data field simply by clicking the **Publish** button that is available on the Overview, Formatting, Parameters and Mapping and Field Test workspaces.



Steps

Use the following procedure to publish a field.

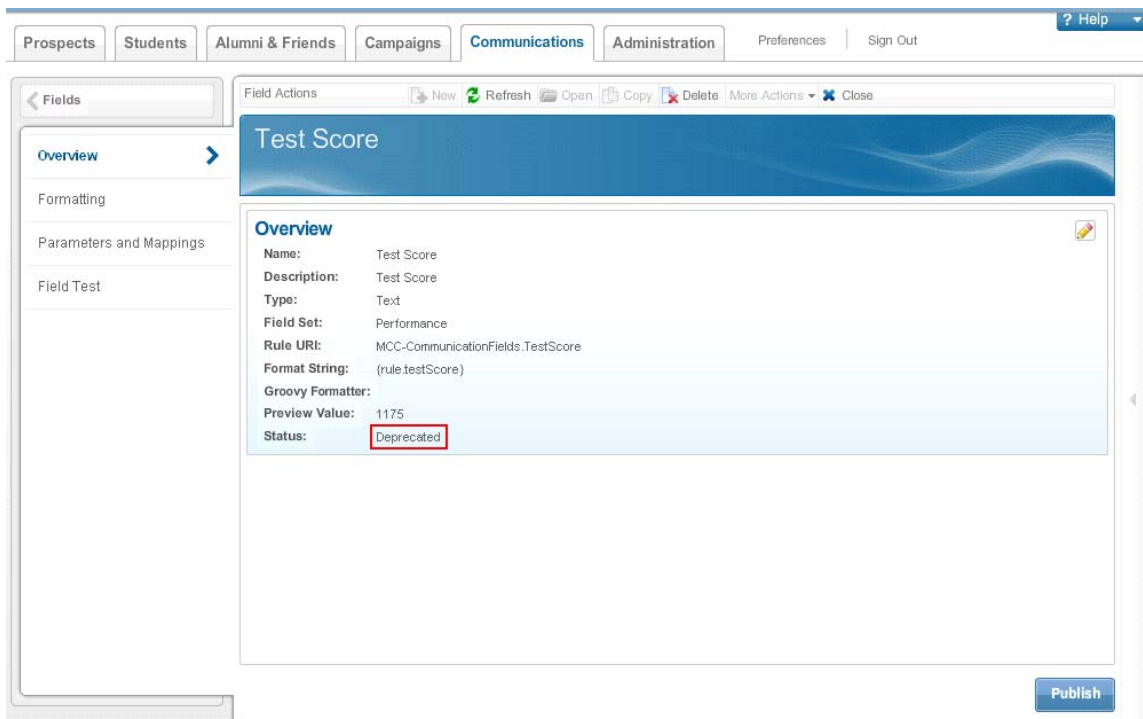
1. In the **Communications** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. On the Overview page, click the **Publish** button.
5. Once the field is published, the field status changes to Production.



Deactivating and Deleting a Data Field

Introduction

The **Deprecate** button, that is available on the Overview, Formatting, Parameters and Mapping and Field Test workspaces, allows users to deactivate a field within the Personalization fields. Once they are deactivated the status changes to Deprecated and it will not appear in the Personalization Fields located in the content template. However, you can easily activate the field by clicking the **Publish** button and the field status returns to Production.



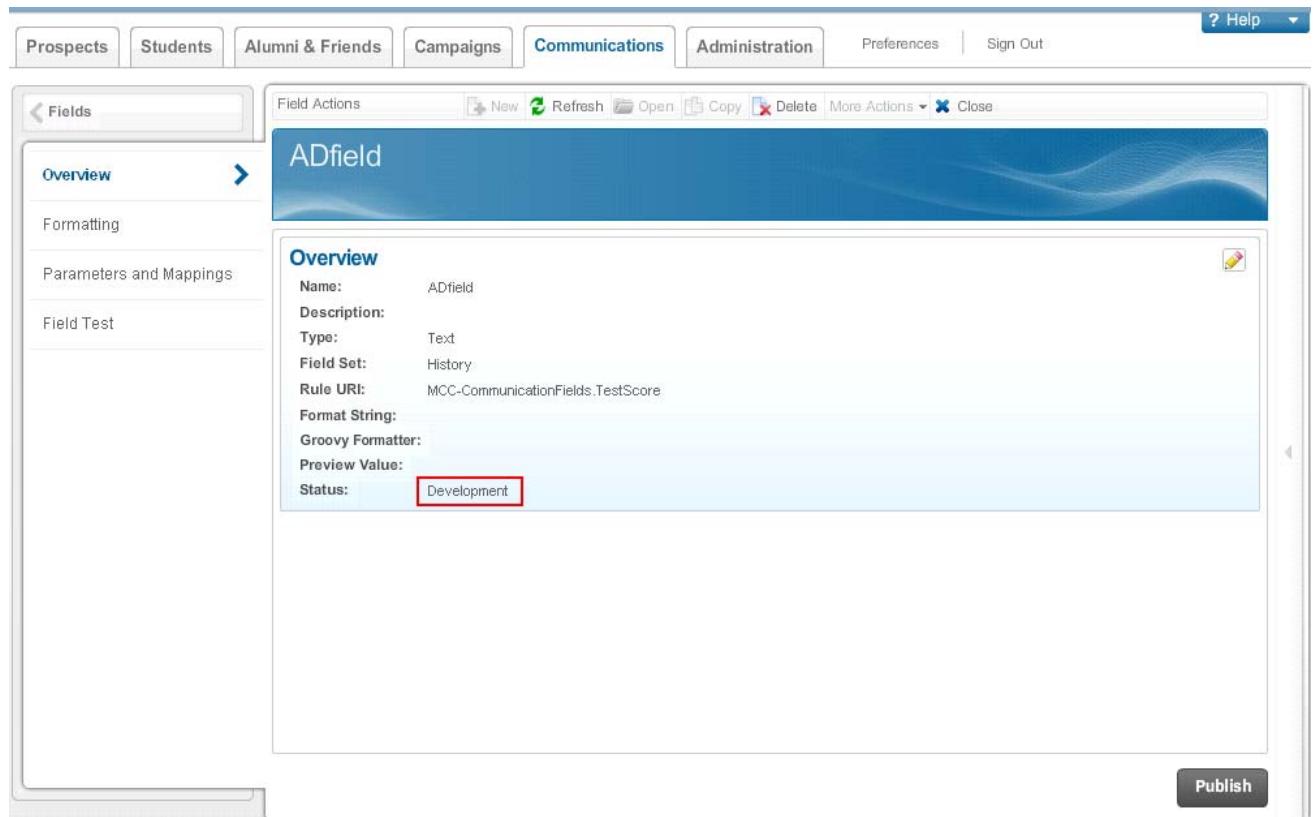
Steps

Use the following procedure to deactivate (Deprecate) a field.

1. In the **Communications** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. On the Overview page, click the **Deprecate** button.
5. Once the field is deprecated, the field status changes to Deprecated.
6. To reactivate the field, click the **Publish** button.

Deleting a data field

A field can be deleted in Development status. Once the field is published, the field can only be deactivated (Deprecated) to remove it as an option in the Personalization Fields. Once the field is deleted, it is removed from the application.



Steps

1. In the **Communication** tab, click the **Data Field** link.
2. Click the **Fields** link.
3. On the Fields page, double-click a field and open it.
4. On the Overview page, click the **Delete** icon.
5. Click the **Refresh** icon.
6. Once deleted, it is no longer available within the application.

Exercise: Creating a Custom Personalization Field

Business scenario

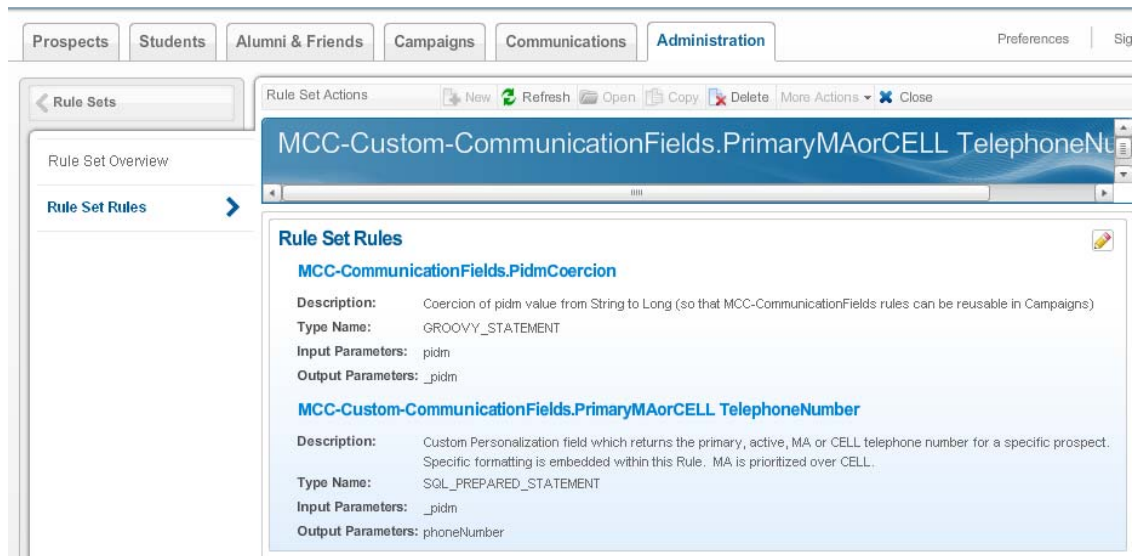
In this exercise, your institution wants to create a new personalization field that returns the primary, active, MA (mailing) or CELL telephone number for a specific prospect. Specific formatting is embedded within this Rule. MA is prioritized over CELL. Creating an institution-defined Personalization field begins with building a Business rule. Business Rules/Rule Sets/URIs are found in the **Administration** tab of Banner Relationships Management (BRM).

Overview

The Relationship Management workspace supports your effort to create and organize relevant data and data fields that populate the content template. Creating personalization data fields is a two part process: Part 1: Creating the rule and Part 2: Incorporating the rule into a custom personalization data field.

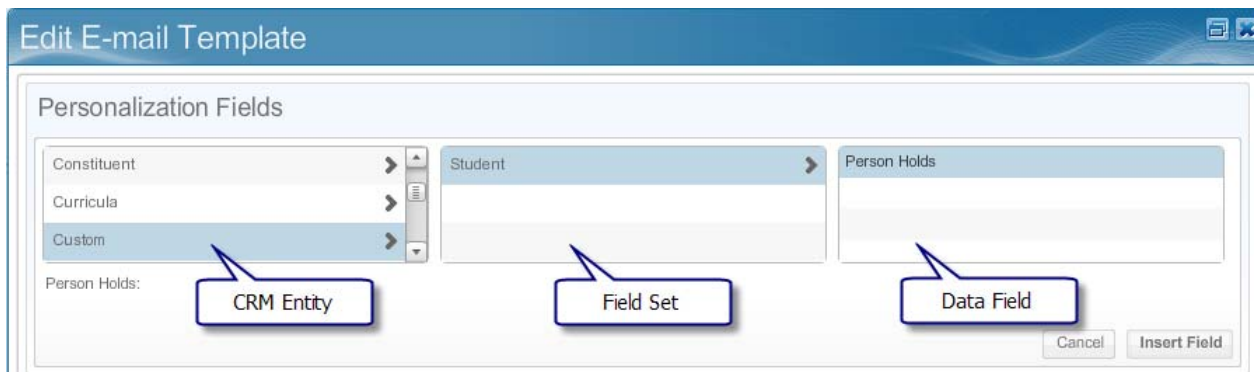
Part 1

In part 1, you or IT creates the rule, rule set, and URI on the **Administration** tab. In the Rule statement, notice the input and output parameter names in the Parameters area, you will need to refer to the output when creating the personalization data field. In the rule set is important to attach both the new rule you created and the delivered MCC-CommunicationFields.PidmCoercion rule. Be sure to add this rule FIRST and the new rule Next. For more information on creating rules, see the *EMRM – Administration - Business Rules* training workbook.



Part 2

In part 2, you or IT creates the CRM Entity, Field set, and attaches the rule to the actual personalization field on the **Communications** tab. The graphic below demonstrates the data structure in Relationship Management and is utilized in the Personalization fields. You will see this structure when inserting Personalization fields into an e-mail template.



Part 1 – Creating the Rule, Rule Set, and URI

Steps to create the rule

Steps to create a new business rule:

1. From the **Administration** Tab, click **Business Rules**.
2. From the Business Rules view, click **Rules**.
3. On the Rule Actions bar, click **New**.



The screenshot shows a 'Create Rule' dialog box with the following fields and controls:

- Name:** A text field containing 'MCC-Custom-Communicati'.
- Description:** A text field containing 'Custom Personalization field which returns the'.
- Required:** A checkbox that is currently unchecked.
- Buttons:** 'Cancel' and 'Save' buttons located at the bottom right of the dialog.

4. Enter *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* in the **Name** field.
5. Enter *Custom Personalization field which returns the primary, active, MA or CELL telephone number for a specific prospect. Specific formatting is embedded within this Rule. MA is prioritized over CELL.* in the **Description** field, if desired.
6. Click **Save** to create the new rule.
7. Click **Rule Statement** on the left navigation bar.
8. Click the "Add Statement to this role" or the **Edit** icon to access the Create Statement screen.
9. Accept the default *SQL_PREPARED_STATEMENT* in the **Statement Type** field.
10. Leave the **Output Array** check box unchecked.
11. Enter the statement: *select baninst1.f_get_primary_ma_ce_telephone (?) from dual* in the **Statement** field.

Edit Statement

Statement Type: * SQL_PREPARED_STATEMENT

Output Array: ☐

Statement: * select baninst1.f_get_primary_ma_ce_telephone (?) from dual

Cancel Save

12. Click the **Save** button.

13. Click the **Edit** (✎) icon for the parameters to add them.

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign Out

Rules

Rule Overview

Rule Statement >

Rule Actions New Refresh Open Copy Delete More Actions Close

MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNu

Statement

select baninst1.f_get_primary_ma_ce_telephone (?) from dual

Statement Type: SQL_PREPARED_STATEMENT Output Array: No

Parameters

Flag	Name	Description	Input Req	Output Guaranteed

14. Click the **Add Output Parameter** button.

15. Double-click in the **Name** field and replace the word output with the word phoneNumber.

Note: be sure to use the capitalization as shown.

16. Click the **Add Input Parameter** button.

17. Double-click in the **Name** field and enter the following text: `_pidm`

Note: be sure to use the formatting with the underscore as shown.

18. Click the ellipse icon (three dot) in the **Constant** field.

19. Select `TESTPIDM` from the list of constants.

20. Click the **Select** button.

21. Click the **Save** button.

Flag	Name	Description	Input Req	Output Guarar	Constant	Fixed	Value
Output	phoneNumber	Description for	No	Yes	...	No	String
Input	<u>pidm</u>	Description for	Yes	No	TESTPIDM	No	String

22. Click the **Validate** button to validate the selected statement.

23. Click the **OK** button.

Steps to create the rule set

Steps to create a new rule set:

1. Click **Rules** from the left navigation bar.
2. From the Business Rules view, click **Rule Sets**.

- Click the **New** icon on the Rule Set Actions bar.
- Enter *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* in the **Name** field.
- Enter *Custom Personalization field which returns the primary, active, MA or CELL telephone number for a specific prospect. Specific formatting is embedded within this Rule. MA is prioritized over CELL.* in the **Description** field.



Create Rule Set

Name: * MCC-Custom-Communication

Description: for a specific prospect. Specific formatting is

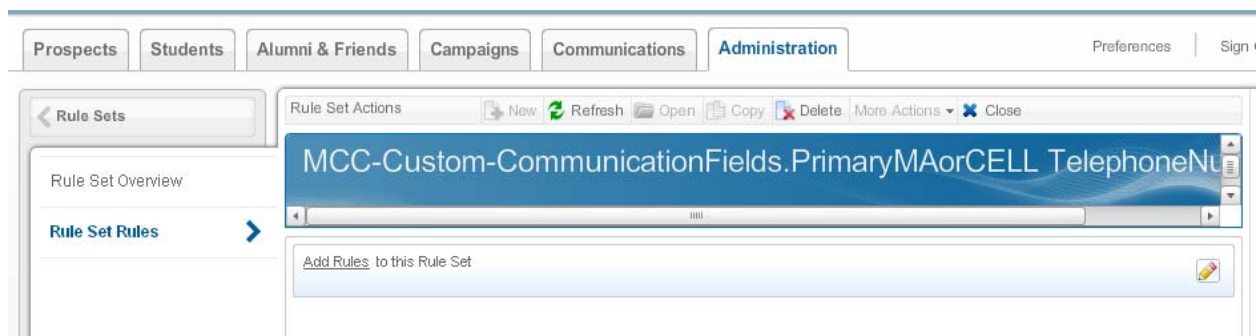
Required: ☐

Cancel Save

- Click the **Save** button.
- Click **Rule Set Rules** from the left navigation bar.

Note: The Rule set for Personalization fields must always include the delivered MCC-CommunicationFields.PidmCoercion rule. Be sure to add this rule FIRST and the new rule Next.

- Click the **Edit** icon.



Prospects Students Alumni & Friends Campaigns Communications Administration

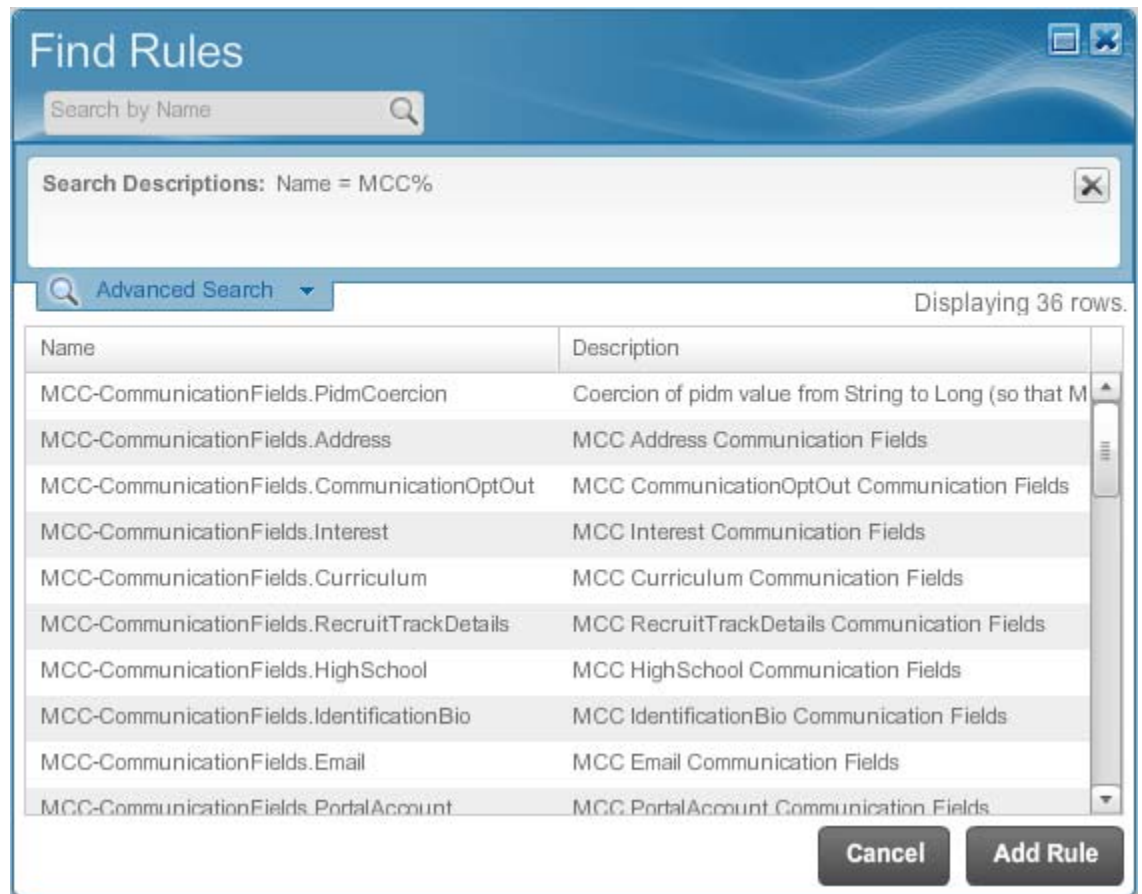
Rule Set Rules

Rule Set Actions: New Refresh Open Copy Delete More Actions Close

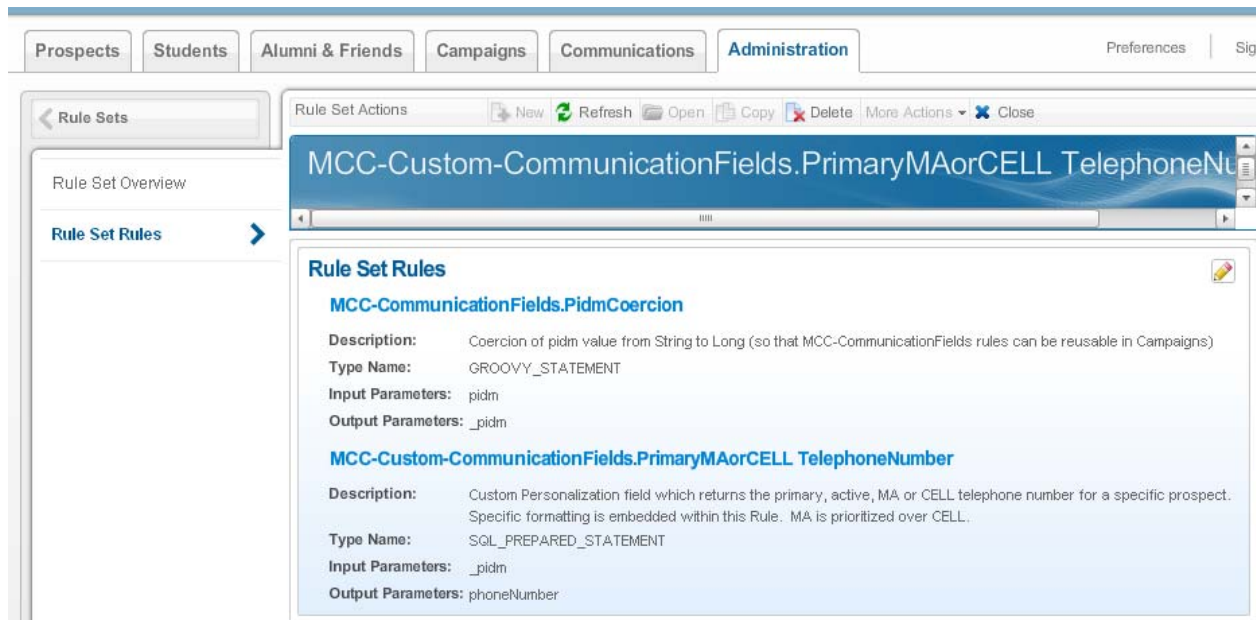
MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber

Add Rules to this Rule Set

- Click the **Add Rule** button to search for a new rule to add to the rule set.
- Enter *MCC%* in the **Search by Name** field, then press enter to search for any rule that begins with MCC.



11. Select the *MCC-CommunicationFields.PidmCoercion* rule.
12. Click the **Add Rule** button.
13. Click the **Add Rule** button to search for a new rule to add to the rule set.
14. Enter *MCC%* in the **Search by Name** field, then press enter to search for any rule that begins with MCC.
15. Select the *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* rule that you created.
16. Click the **Add Rule** button.
17. Click the **Save** button.



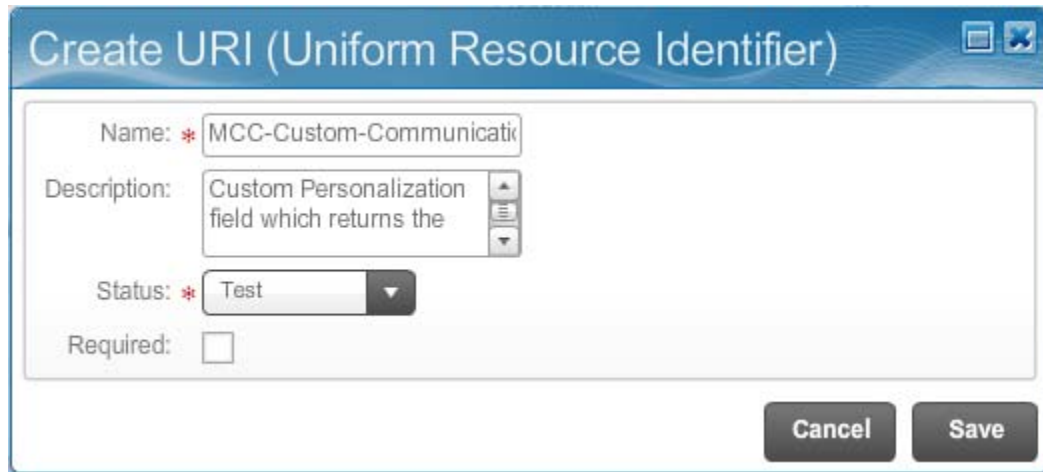
18. Click the **Rule Sets** link on the left navigation bar.

Steps to create the URI

Each rule set must be associated with at least one URI. A URI, or Universal Resource Identifier, is the unique name used to identify a rule set. You must associate each rule set with at least one URI. The URI name is the actual building block that you execute to perform the rules within the associated rule set.

Steps to create a new URI:

1. From the Business Rules view, click **URIs**.
2. Click the **New** icon from the URI Actions Bar.
3. Enter *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* in the **Name** field.
4. Enter *Custom Personalization field which returns the primary, active, MA or CELL telephone number for a specific prospect. Specific formatting is embedded within this Rule. MA is prioritized over CELL.* in the **Description** field.
5. Select *Test* in the **Status** field.



Create URI (Uniform Resource Identifier)

Name: * MCC-Custom-Communicati

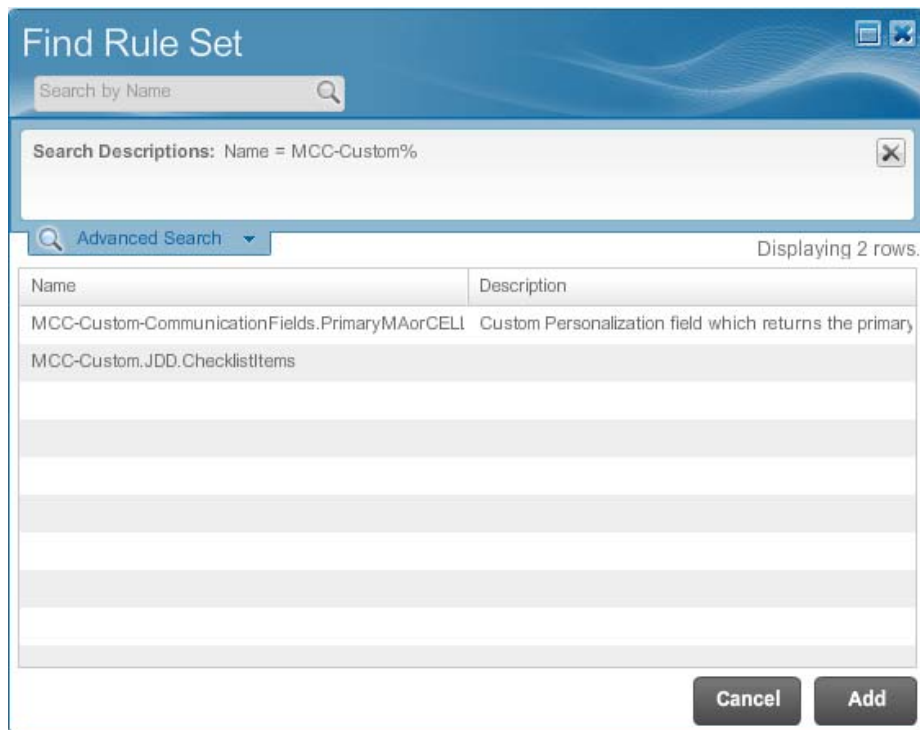
Description: Custom Personalization field which returns the

Status: * Test

Required: ☐

Cancel Save

6. Click the **Save** button. From the URIs View, double-click a URI to view its information.
7. Click **URI Rule Set** to access the URI Rule Set view.
8. Click the **Edit** (📝) icon to view available rule sets.
9. Enter *MCC-Custom%* in the **Search by Name** field, then press enter to search for any rule set that begins with MCC-Custom.
10. Select the *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* rule set that you created.
11. Click the **Add** button.



Find Rule Set

Search by Name: 🔍

Search Descriptions: Name = MCC-Custom% ✕

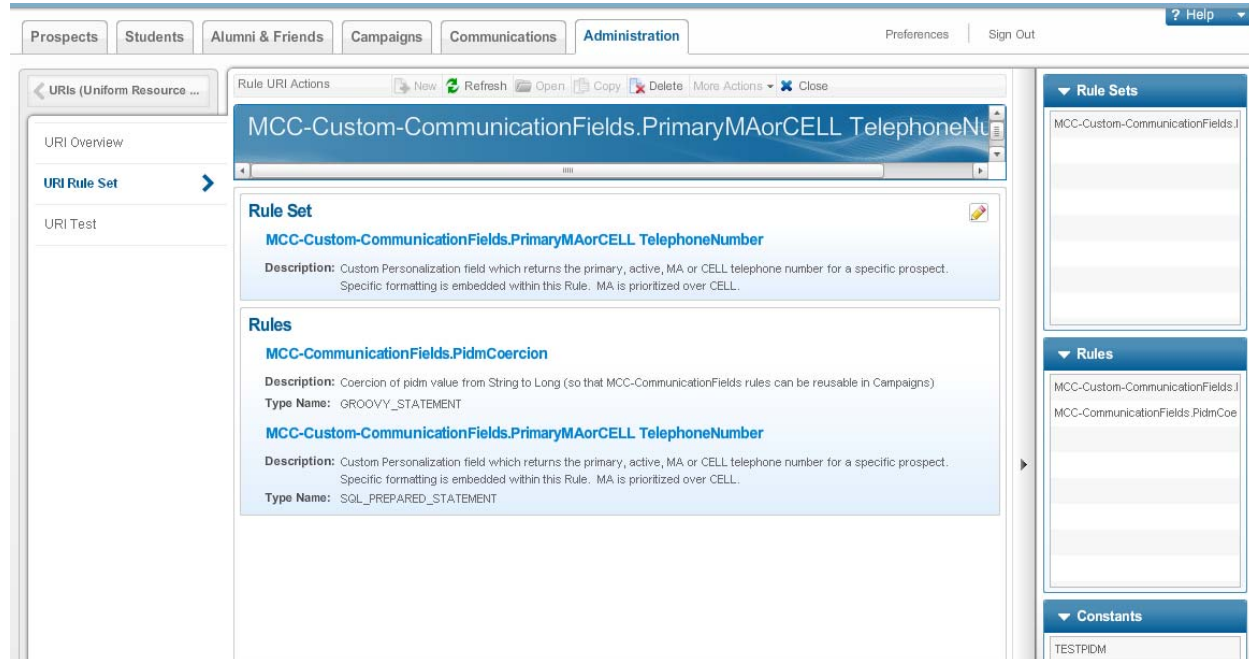
🔍 Advanced Search ▾

Displaying 2 rows.

Name	Description
MCC-Custom-CommunicationFields.PrimaryMAorCELL	Custom Personalization field which returns the primary
MCC-Custom.JDD.ChecklistItems	

Cancel Add

12. Select a rule set, using the Search box as necessary to locate a specific rule set, and click **Add** to add it to the URI.



Steps

With a rule set associated with a URI, you may test the input parameters if you know the PIDM of the person you want to use for the test.

Steps to test the parameters of a URI:

1. Click **URI Test** on the left navigation bar to view the input parameters for this URI.



2. Click the **Edit** (✎) icon to view the parameters of this URI in more detail.
3. Click in the **Input Value** field.

Parameter Name	Type	Input Value
pidm	String	

Cancel OK

- Note that you can click on a parameter to enter an Input Value for that parameter. Enter a value in the **Input Value** field and click **OK** to add the value to the parameter.

pidm

Input Value: *

Cancel Complete

Parameter Name	Type	Input Value
pidm	String	

Cancel OK

- Click **Test** to generate output parameters.

Custom-CommunicationFields.PrimaryMAorCELLTelephoneNumber			
Input Parameters			
Name: pidm	Type: String	Value: 2293126	Input Required: Yes
Output Parameters			
Name: _pidm	Type: Long	Value: 2293126	Output Guaranteed: Yes
Name: phoneNumber	Type: String	Value: (312) 944-0759	Output Guaranteed: No


- Click **Reset** to return the URI to its original state (i.e. just Input Parameters).

Part 2 - Creating the Personalization Field

Steps to create a new CRM entity

Once a rule, rule set, and URI is created, you can use the following procedure to create a new CRM entity, field set and field.

Use the following procedure to create a new CRM Entity. If the Custom CRM entity is already created, you can skip this step.

- Click the **Communicaitons** tab.
- Click the **Data Fields** link on the left navigation bar.
- Click the **CRM Entities** link.
- Click the **New**  icon.
- Enter *Custom* in the **Name** field.




The dialog box titled "Create CRM Entity" has a "Name" field with a red asterisk containing the text "Custom". Below it is a "Description" field containing the text "developed personalization fields". At the bottom right are "Cancel" and "Save" buttons.

- Enter *Contains custom developed personalization fields specific to this institution.* in the **Description** field.
- Click the **Save** button.

Steps to create a new field set

Use the following procedure to create a new field set. If the the custom Field Set entity you want to use is already created, you can skip this step.

1. Click the **Field Sets** link on the left navigation bar.
2. Click the **New**  icon.
3. Enter *Contact Information* in the **Name** field.



The screenshot shows a 'Create Field Set' window with the following fields and values:


- Name:** * Contact Information
- Description:** Custom - This field set contains fields related to
- CRM Entity:** Custom

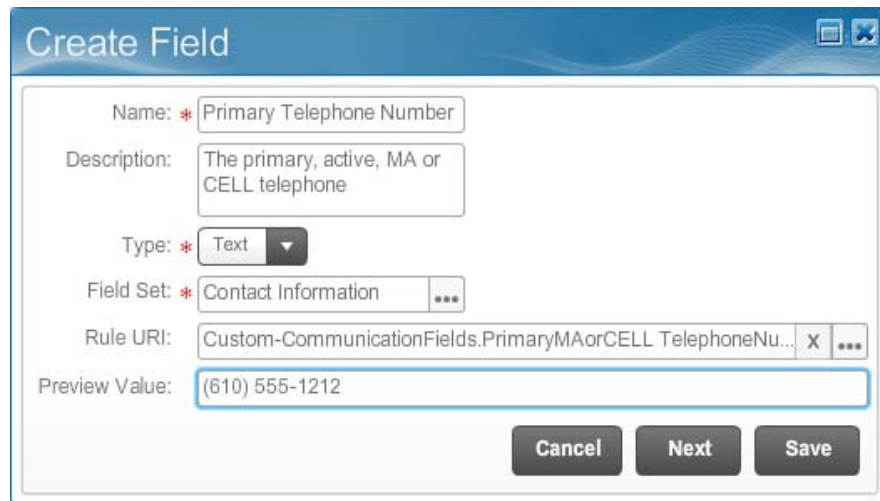
Buttons: Cancel, Save

4. Enter *Custom - This field set contains fields related to the constituent's address.* in the **Description** field.
5. Click the CRM Entity drop-down arrow and select the Custom CRM Entity you created in the previous steps.
6. Click **Save**.

Steps to create a new field

Use the following procedure to create a new field.

1. Click the **Fields** link on the left navigation bar.
2. Click the **New**  icon.
3. Enter *Primary Telephone Number* in the **Name** field.



Create Field

Name: * Primary Telephone Number

Description: The primary, active, MA or CELL telephone

Type: * Text

Field Set: * Contact Information

Rule URI: Custom-CommunicationFields.PrimaryMAorCELL TelephoneNu... X

Preview Value: (610) 555-1212

Buttons: Cancel, Next, Save

4. Enter *The primary, active, MA or CELL telephone.* in the **Description** field.

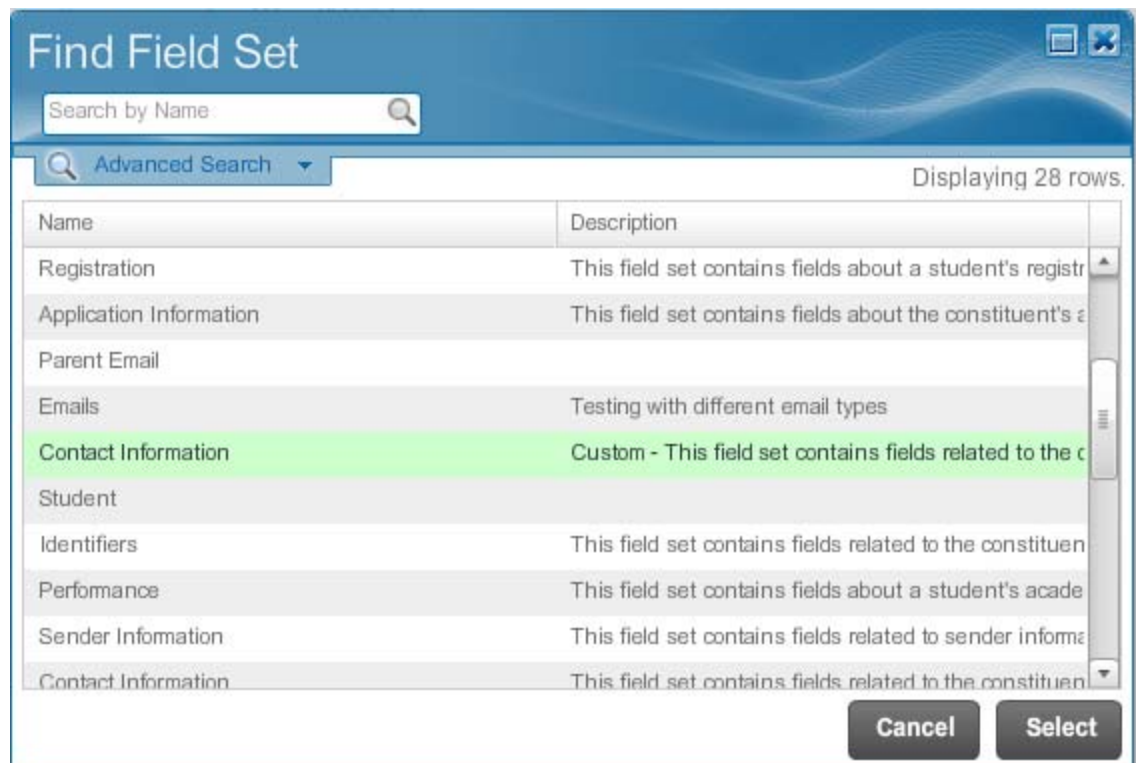
5. Click the **Type** drop-down arrow and select the Type.

Note: You can select HTML or Text.

6. Click the **Field Set** Look Up icon.

7. Click on the *Contact Information* field set whose description begins with "Custom – This field set contains....".

Note: Be sure that this is the Contact Information field set associated with the Custom CRM Entity.



Find Field Set

Search by Name

Advanced Search

Displaying 28 rows.

Name	Description
Registration	This field set contains fields about a student's registr
Application Information	This field set contains fields about the constituent's e
Parent Email	
Emails	Testing with different email types
Contact Information	Custom - This field set contains fields related to the c
Student	
Identifiers	This field set contains fields related to the constituen
Performance	This field set contains fields about a student's acade
Sender Information	This field set contains fields related to sender inform
Contact Information	This field set contains fields related to the constituen

Buttons: Cancel, Select

8. Click the **Select** button.
9. Click the **Rule URI** Look Up icon.
10. Enter MCC-Custom% in the Search by URI Name field and press enter to view search results.
11. Click the *MCC-Custom-CommunicationFields.PrimaryMAorCELL TelephoneNumber* Rule URI.

The image shows a 'Find Rule URI' dialog box. At the top, there is a search bar labeled 'Search by URI Name' with a magnifying glass icon. Below it, a text box displays 'Search Descriptions: URI Name = MCC-Custom%'. A tab labeled 'Advanced Search' is visible. The main area contains a table with two columns: 'URI' and 'Description'. The table shows two rows: 'MCC-Custom.JDD.ChecklistItems' and 'MCC-Custom-CommunicationFields.PrimaryMAorCELL Custom Personalization field which returns the primary'. The second row is highlighted in green. At the bottom right, there are 'Cancel' and 'Select' buttons. The text 'Displaying 2 rows.' is shown in the top right corner of the table area.

URI	Description
MCC-Custom.JDD.ChecklistItems	
MCC-Custom-CommunicationFields.PrimaryMAorCELL	Custom Personalization field which returns the primary

12. Click the **Select** button.
13. Enter (610) 555-1212 in the **Preview Value** field.

Note: This is a placeholder for the dynamic data that is inserted.
14. Click the **Save** button.

Note: Do not click the Next button as you will not be associating parameters.
15. Click the **Formatting** link on the left navigation bar.
16. Click the **Edit** icon to add a statement.

17. Enter `{rule.phoneNumber}` in the large text field.

Prospects Students Alumni & Friends Campaigns **Communications** Administration Preferences Sign Out

Fields

Overview

Formatting

Parameters and Mappings

Field Test

Field Actions New Refresh Open Copy Delete More Actions Close

Primary Telephone Number

Statement

Statement Type: Formatted String

{rule.phoneNumber}

Notes: Always enter as shown above – within { } enter rule. – and the **name** entered in the Business Rule Output Parameter – see below:

Prospects Students Alumni & Friends Campaigns Communications **Administration** Preferences

Rules

Rule Overview

Rule Statement

Rule Actions New Refresh Open Copy Delete More Actions Close

Custom-CommunicationFields.PrimaryMAorCELL Telephone

Statement

select baninst1.f_get_primary_ma_ce_telephone (?) from dual

Statement Type: SQL_PREPARED_STATEMENT Output Array: No

Parameters

Flag	Name	Description	Input Req	Output
Output	phoneNumber	Description for RuleArgument named output	No	No
Input	_pidm	Description for RuleArgument named input	Yes	No

The prescribed format of the Parameter Name which goes into the Format rule is always first word all lower case and all subsequent words Mixed Case.

This personalization does not require additional Parameters and Mapping, so they are left blank. The parameters were created as part of the rule itself.

18. To test the Data Field, click the **Field Test** link on the left navigation bar.

Prospects Students Alumni & Friends Campaigns **Communications** Administration Preferences Sign Out

Fields

Overview

Formatting

Parameters and Mappings

Field Test >

Field Actions New Refresh Open Copy Delete More Actions Close

Primary Telephone Number

Target Name: * Lee ...

Organization: * SunGard University

Parameters

Parameter Name	Input Value

Results

(610) 555-1212

Reset Test

19. Click the **Target Name** Look Up icon.
20. Select a name to test.
21. Click the **Select** button.
22. Click the **Organization** Look Up icon.
23. Select an organization to test.
24. Click the **Select** button.
25. Click the **Test** button at the bottom of the page.
26. View the results in the Results window.

The screenshot displays the 'Field Test' results for the 'Primary Telephone Number' field. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The left sidebar shows a tree view with 'Fields' expanded, containing 'Overview', 'Formatting', 'Parameters and Mappings', and 'Field Test' (which is selected). The main content area has a 'Field Actions' bar with buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this, the 'Primary Telephone Number' field is shown with 'Target Name: * Lee' and 'Organization: * SunGard University'. The 'Parameters' section is empty. The 'Results' section shows the value '(610) 555-1212'. At the bottom right, there are 'Reset', 'Test', and 'Publish' buttons.

Parameter Name	Input Value

Results

(610) 555-1212

Testing is Satisfactory

Once testing is determined to be completed and results are as expected,

1. Update the URI Overview status to PRODUCTION
2. Update the Data Field status to PRODUCTION
3. This field can now be used in a communication template

Appendix A: Naming Conventions for Enrollment Management



Naming Conventions for Enrollment Management

Why Use Naming Conventions

A consistent approach to naming conventions will:

- Aid in searches and sorting of long lists of objects.
- Make it clear as to the purpose and use of the object.
- Support scalable requirements (such as multiple admissions offices).

General Considerations

Consistency: When possible, use the same conventions for the names and descriptions of all templates, folders, expressions, and campaigns so that each component of an object can be easily matched to the others.

Spaces, Dashes, & Dots: Except for Campaign activities, Relationship Management allows the use of spaces in names. This convention is typically more familiar to functional users and is recommended vs. use of dots, hyphens or underscores to separate words in names.

Descriptions: Make use of the Description field – even though it is not a required field – to help understand the use of the item.

Name length: Because drop down / search menus in some places of Relationship Management have limited display areas, shorter names are desirable where possible and practical.

Recommended Abbreviations

Abbreviations are important for some system functions, where long names will be truncated. Using abbreviations helps ensure that all necessary information about the item can be conveyed as efficiently as possible.

Abbreviations are important not only in the EM Workspace but also for the EM Performance solution. Thus meaningful and intuitive abbreviations are important. Avoid complex systems for abbreviations.

Abbreviations should be used consistently through the system. For example, do not use ADM for admitted students in some places but DSN (for significant decision) in others.

Institutions may develop their own abbreviation sets. The following is one model that institutions may choose to use, but others may be appropriate.

- Prospect – PRO
- Inquiry – INQ
- Applicant - APP
- Admitted – DSN (for Decision)

Naming component hierarchy

To facilitate quick searching of lists, having a standard sequence for name elements is recommended. The specific sequence may vary depending on the EM component, but should be used consistently within that area.

For example, with communication templates, the following sequence may be appropriate:

- Target audience
- Purpose of communication
- Level (such as department, major, level, or high school class year)
- If needed, Unit originating communication (such as athletics, admissions, financial aid, provost's office).

Template delivery method

For a letter or email that invites prospects who are high school juniors to attend a campus open house, the template name would be as follows:

Prospect Visit Invite HS Junior Email and Letter

As needed, add specifications to distinguish:

Level: Institutions with multiple levels may either

Assume that undergraduate is assumed unless specified, and only add a level indicator for items that are for graduate, professional, or non-degree programs;

OR

Mark all templates with level.

Term: Templates that are appropriate for a specific term should be marked this way as an additional step beyond limiting their active dates.

Folders

The number of folders an institution needs will depend on the number of items they anticipate creating. Several important items to consider when developing folders in EM Recruiting & Admissions Relationships 1.1:

There is no nesting of folders in the current release. Thus you may need to create similarly named folders, with distinctions between purposes indicated deeper in the file name. As an example, you may have multiple folders for international students.

You cannot have one “International” folder with subfolders for topics such as housing, financial aid, and visa and legal requirements.

Instead, you may have folders titled

- International Visa & Legal
- International Financial Aid
- International Housing

Templates cannot be moved from one folder to another after they are published. Be sure to create the necessary folders before you begin to generate templates.

You can change a folder name that contains templates. Thus if the purpose of the folder changes from its original intent, you can change the name of the folder.

Plan for growth. If a folder has the potential to include hundreds of templates, consider whether template names will be sufficient to facilitate searching or whether you should break this into multiple folders.

Like items should have names that begin similarly. For example, if all graduate communications are distinct from undergraduate communications, it may be beneficial to for all graduate folders to begin with the word “Graduate”, so that individuals working on graduate admissions can easily select templates from the appropriate folder.

Below is one example of a folder name structure. Additional or alternative folders may be appropriate depending on the institution.

Names	Descriptions
General/Events	General Information and Events for any population
Prospects	Information for prospects
Inquiry Transfer	Information for transfer inquiries
Inquiry 1 st Time FYS	Information for first time first-year student inquiries

Names	Descriptions
Inquiry Non-Degree	Information for non-degree inquiries
Applicant Transfer	Information for transfer applicants
Applicant 1 st Time FYS	Information for first time first-year student applications
Applicant Non-Degree	Information for non-degree applicants
Decisoned	Information for applicants with a decision code
Personal Recruiter Name	Templates specific to a recruiter.
ZTest and Training	Folder to house templates created for testing or training purposes. [This category should not exist in the production environment, but can be very helpful in the test environment to avoid clutter in the other categories. Using Z in the front helps place this at the bottom of the list.]

Communication Templates

Naming conventions for communication templates will help locate the appropriate template for communications and assist users of EM Recruiting and Admissions Performance, where these names will be evident as well.

The following is an example of communication templates that might be placed in the Inquiry 1st Time First-Year Student folder:

Names	Descriptions
INQ Ful Gen LTR	Inquiry Fulfillment Letter to everyone (non-departmental)
INQ Flwup Gen EML	Inquiry Follow up Email to everyone (non-departmental)
INQ CurrSt Gen TA	Inquiry Targeted Announcement from Current Student to everyone (non-departmental)

Expressions

The names for expressions should reflect the output of the expression.

Name sequencing is complicated, since the Expression Builder includes well over 100 options, many of which include multiple individual values. However, using the primary search terms in the expression is important, as is consistency in naming sequence for parallel expressions. For example:

If the expression retrieves all inquiries of a particular admission type for a particular college and term, the expression name might be "INQ FYS Engineering Fall 2008."

Parallel or similar expressions should use parallel names. Thus the equivalent expression to the one above for the College of Nursing would be "INQ FYS Nursing Fall 2008."

If the expression allows the user to specify values upon calculation, the name should indicate this. One efficient way is via use of question marks. For example, if the expression allows a recruiter to input the college and state of their choice, the expression name might be "College ? and State ?".

Funnel state expressions

All expressions used for funnels should include "funnel" in the name and description. This can help avoid unwitting changes in these expressions that adversely affect the accuracy of funnel comparisons from different funnel instances using expressions that were changed between the first and second funnel instance. For example, the funnel expressions might have the following names:

- Funnel Qual PRO
- Funnel Qual INQ
- Funnel Qual APP
- Funnel DisQual PRO
- Funnel Pend APP

Population Lists

Population list names should reflect the logical attributes underlying the list.

Lists created via expressions should

- Use the expression name in the list.
- For lists that are snapshots (i.e., cannot be refreshed), the population list should indicate the date on which the list was created (for example, "PA Engineering Fall

2009 05082008."

- For lists that may be refreshed, indicate this in the name as a reminder to capture the appropriate population before using the list (for example, "PA Engineering Fall 2009 Refresh.")

Campaigns

Campaign names should reflect the intent of the campaign. For example, a campaign focused on completion of incomplete applications for fall 2009 might be named App Complete Fall 2009.

Campaign names, like templates, should follow a consistent sequence in naming elements.

Since campaigns in Release 1.1 cannot be run continuously with new populations, you may need to copy a current campaign and attach it to a new population list to capture new targets who enter your funnel after the initial launch of the campaign. Place the intent of the campaign first in the name, and the iteration at the end. For example, if you have a campaign designed to encourage prospects for Fall 2009 to complete their applications that you run several times, you may use the following sequence:

- App Complete Fall 2009 #1 (launched November 1, 2008)
- App Complete Fall 2009 #2 (launched December 1, 2008)
- App Complete Fall 2009 #3 (launched January 1, 2009)

Campaign Activities

Relevance: Names for campaign activities should reflect the activity itself, with the greatest level of specificity possible.

Spaces: Campaign activity names cannot have spaces. Use of capitals to distinguish words can be useful (for example, CompletionReminder or VisitInvite).

Each activity in a campaign model must have a distinct name.

Communication activities should use the name of the communication template. If the same template is used multiple times, append a #1, #2, etc. to the activity name, since you cannot use the same activity name twice in a campaign model.

Timers: If multiple timers in a campaign have the same wait time (e.g., wait 2 weeks), append a #1 or #2 to the activity name.

Business Rules: If you use the same rule more than once in a model, again append a #1, #2, etc. to each name to distinguish it.

Funnels

Funnel Instances: Because funnel instances must be run against a term and level, every funnel instance name should indicate the term and level. For example, a funnel instance run against the fall 2009 term for undergraduates should be called something like Fall 2009 UG.

Funnel Models: For analysis purposes, institutions should typically use the same funnel model across multiple terms. Changing the model from term to term will make it impossible to perform comparative analysis on funnel status across terms.

Although institutions could use the same funnel model for both undergraduate and graduate / professional admissions, many may need a separate model for distinctions. The names for the distinct funnel states associated with each model should clearly distinguish between the two (for example, Funnel Qual Pro UG vs. Funnel Qual Pro Grad).

Additionally, some institutions may handle certain student types (such as transfers or non-degree) through unique funnel models.

Funnel model names should be clear and meaningful.

Funnel States

Funnel state names have several purposes:

- As a primary dashboard for progress toward the institution's enrollment goals;
- As a quick indicator in the Profile Overview for an individual prospect's progress toward enrollment;
- As a targeting attribute in the Prospective Student Portal.

Funnel state names thus must be clear and meaningful and unambiguous. If a user needs to use a reference guide to determine distinctions among funnel states, reconsider your funnel names.

Appendix B: Template Editor Toolbar



Template Editor Toolbar

Template Editor Toolbar

The Template Editor Toolbar utilizes program FCKeditor. FCKeditor is a lightweight text editor to be used in web pages. It provides most of the commonly used functions from desktop editors like Word to the web. By using FCKeditor you can write text, format it, create tables and much more. The editor doesn't need any kind of installation on your computer.

Features of the editor

- Multi browser compatibility
- Can use HTML
- Font formatting: type, size, color, style, bold, italic, etc.
- Text formatting: alignment, indentation, bullets list, etc.
- Cut, Paste, and Paste as Plain Text, Undo and Redo features
- Find and Replace tools
- Paste from Word
- Link and anchors support
- Insert Images and upload images from server repository browser
- Create Tables and edit tables
- Format/Edit the cells in a table
- Toolbar customization
- Spell checker
- Integration with ASP, ASP.NET, Java, ColdFusion, Perl, PHP, JavaScript, etc.

Available Options

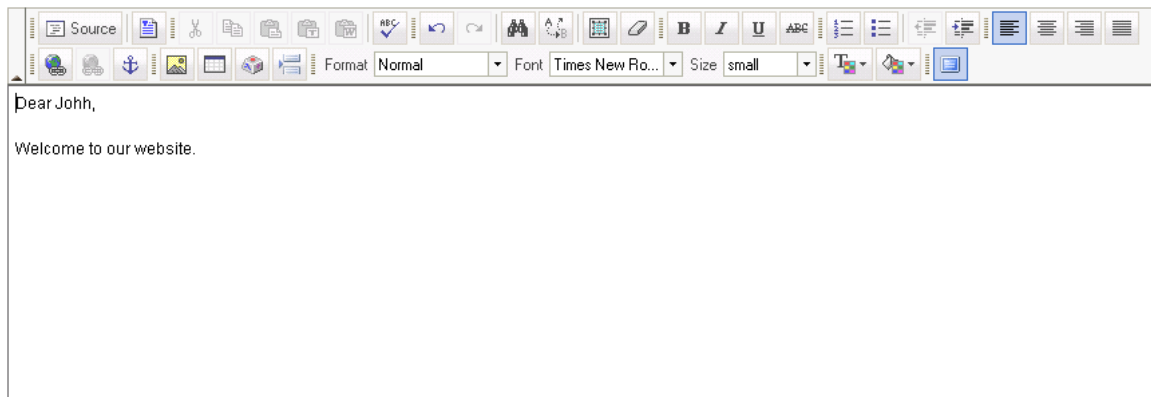
Available options

The options currently available for use with the Enrollment Management Recruiting and Admissions product include the following functions. For more detailed instructions, consult the following website:

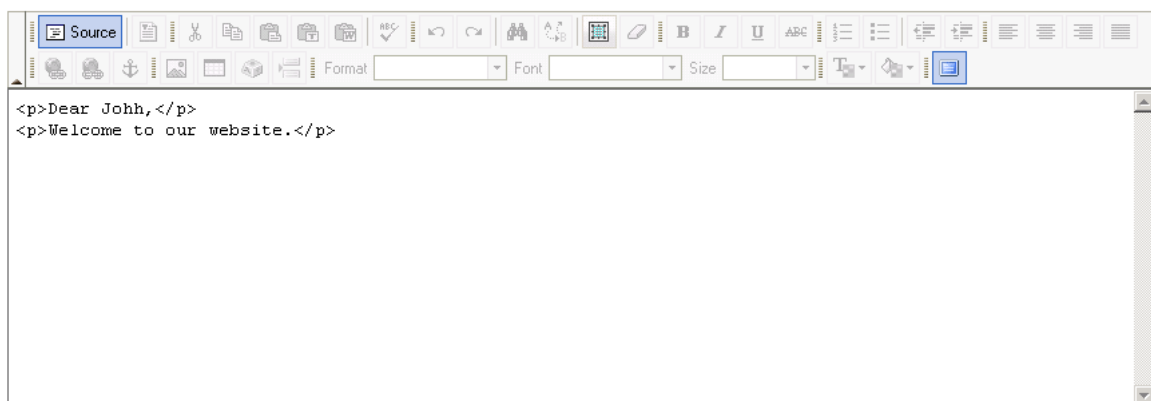
[Hhttp://docs.fckeditor.net/FCKeditor_2.x/Users_Guide/Quick_Reference](http://docs.fckeditor.net/FCKeditor_2.x/Users_Guide/Quick_Reference)

View/Hide HTML source

This function allows a user to toggle between the standard view and html view of a document. This graphic shows the standard view.



Click on the **Source** button to view the html code. Click the **Source** button again to return to the normal view.

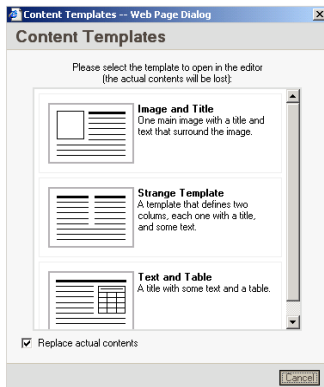


HTML code should be edited by users with an understanding of the code.

Note that while Personalization Fields cannot be inserted in HTML view, the code can be copied from the regular view and pasted into the HTML view.


- Select a formatting template

This function allows you to choose a pre designed layout and style for your document from the popup window. Note that all content currently in your document will be lost once you select a formatting template.




- Cut selected elements from the template

To cut text from the document, select the text and then do one of three things:

- Click the  cut icon from the toolbar.
- Right click on the mouse and select **cut** from the drop down menu.
- Use the keyboard combination CTRL-X.


- Copy selected elements to the clipboard

To copy text within the document, select the text and then do one of three things:


- Click the  copy icon from the toolbar.
- Right click on the mouse and select **copy** from the drop down menu.
- Use the keyboard combination CTRL-C.

- Paste items with original formatting


To paste text while retaining the original formatting, place the cursor in the document and do one of three things:

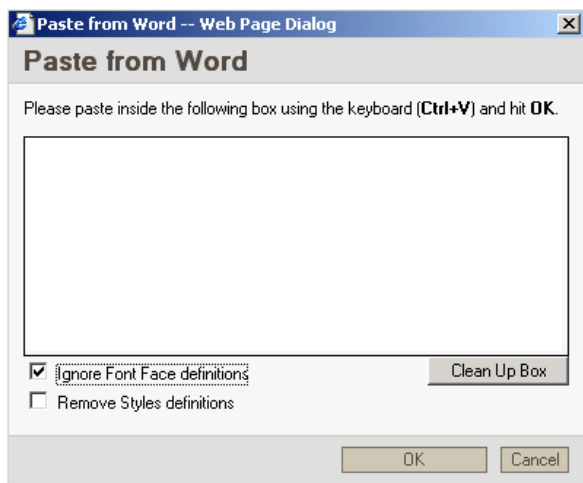
- Click the  paste icon from the toolbar.
- Right click on the mouse and select **paste** from the drop down menu.
- Use the keyboard combination CTRL-V.

- Paste as unformatted text into the template

To paste as unformatted text and lose the original formatting, place the cursor in the document and select the  paste as text icon from the toolbar.

- Paste Microsoft Word content into the template

To paste information from a Microsoft Word document into the template, click the Microsoft Word icon  on the toolbar. Paste the Microsoft Word information inside the text box using the keyboard combination CTRL-V. To paste into the template without the current font face or style, check the appropriate checkbox before clicking OK.



- Spell check the template

To check for spelling errors in the template, click the Spell Check icon in the toolbar. Follow the instructions and the **Spell Check** pop up window will open.

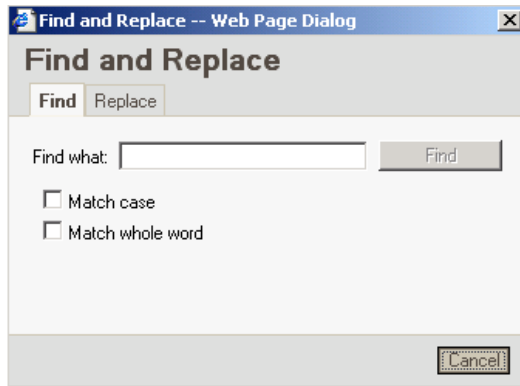
- Undo or Redo changes to the template

Click the Undo icon to go back to the last edit you made in the document. You can also use the keyboard combination CTRL-Z. You may go back (undo) many steps, not just the last one.

Click the Redo icon to restore a step which you decided not to undo.

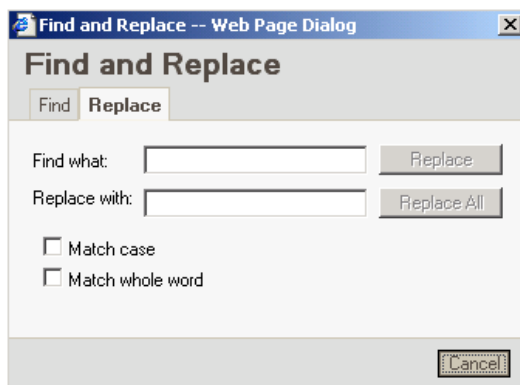
- Search the template content

Use this functionality to find a phrase or word in the document.




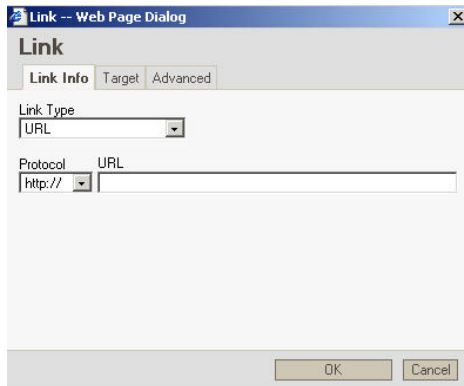
- Replace template content.

Use the Replace function to find a phrase or word and replace it with another phrase or word. To delete the phrase or word, leave the **Replace with:** field blank.



- Insert an HTML link

This feature is used to insert a link an URL address, email or anchor (within the document). Click the  Insert an HTML icon on the toolbar. The Link pop up window opens.



The **Link Type**: drop down menu is where you select the type of link you want to put in the document. The options include

- URL
- Link to anchor in the text
- E-mail

Each option opens different selection menu in the window.

URL

The picture above shows the option for creating a URL link.

4. Select the protocol from the drop down menu. The options include:

- http://
- https://
- ftp://
- news://
- <other>

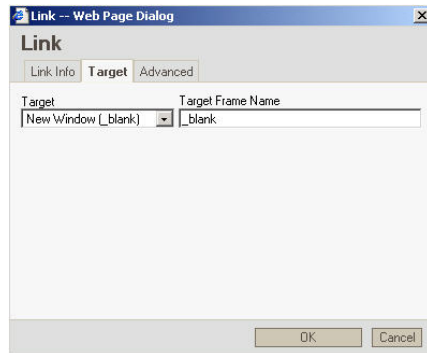
5. Next, type or paste the URL address in the **URL**: field.

6. Press "OK" and the link will appear in your document.

Target

Target is used to specify what type of window the URL link should open.

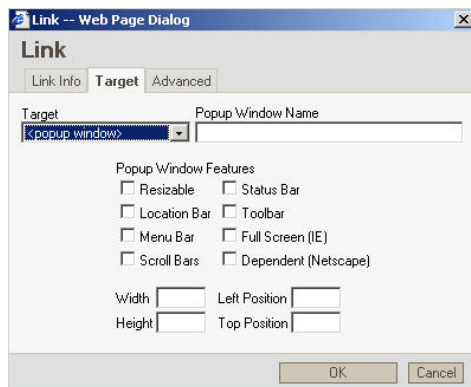
7. To designate a target for your URL, click the **Target** tab in the **Link** pop up window.



8. Select the target from the **Target**: drop down menu. The **TargetFrame Name**: field will auto populate depending on the target selected. The options include:

- <frame>
- New Window (_blank)
- Topmost Window (_top)
- Same Window (_self)
- Parent Window (_parent)
- <popup window>

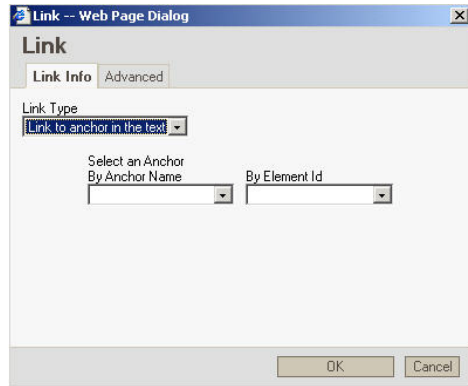
9. The popup window option opens an additional menu. Select the options according to your needs.



Anchor

If you want to link to an anchor in the document:

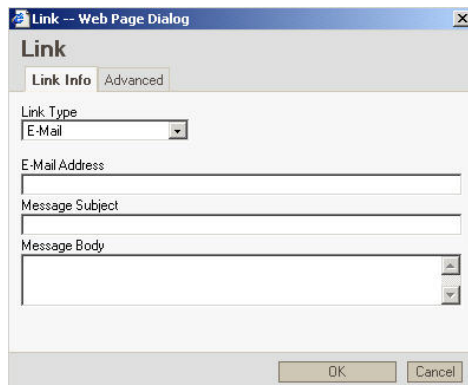
10. Select **Link to anchor in the text** from the **Link Type**: drop down menu in the **Link Type** tab.



11. Select the predefined anchor by **Anchor Name**: or by **Element ID**.
12. Click **OK** to insert the link.

Email


13. Select **E-Mail** from the **Link Type**: drop down menu in the **Link Type** tab to create a link that opens an email editing window.

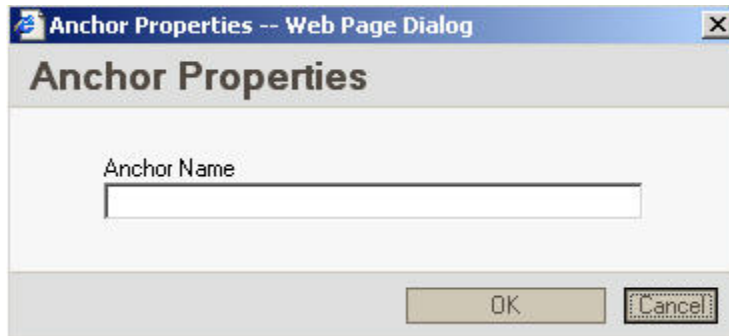



- E-mail Address: specifies the recipient of the email.
 - Message Subject: this text will appear in the email subject line
 - Message Body: this text will appear in the body of the email to be sent to the email address entered above.
14. Press "OK" to insert the link in your document.

- Remove an HTML link


- Insert/Edit an HTML anchor

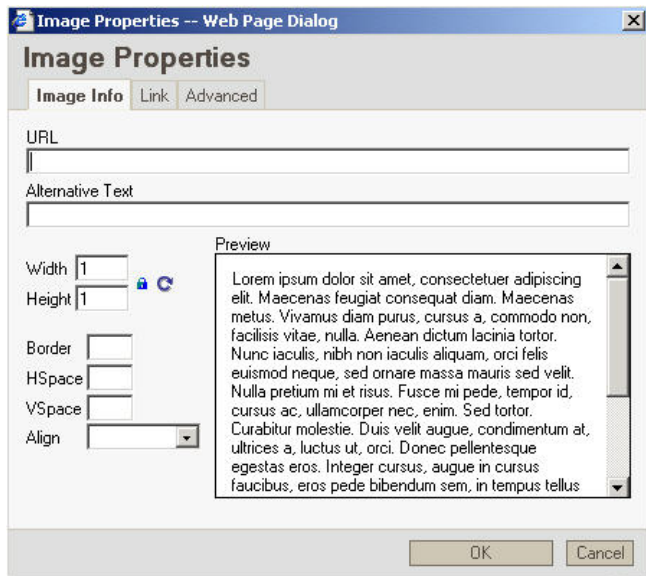
To insert an anchor within your document, place the cursor in front of the text or section you want the anchor to refer to and click the  icon. The **Anchor Properties** menu will open:



Type a name for the anchor in the field and click **OK**. The anchor will appear in the document as the following icon .

- Insert/Edit an image

To insert an image, click the  Image icon on the toolbar. The Image Properties menu opens:



Select the URL address for the image you want to include in your document by typing or pasting the information in the **URL:** field

Type the description of the image in the **Alternative Text:** field. This is helpful for individuals (such as the seeing impaired) using assistive technology.

Additional menu options include:

- **Width:** specifies image width.
- **Height:** specifies image height.

To reset the width and height, click the arrow icon. To lock the width and height click the lock icon.

- **Border:** specifies the size of the border you want to place around the image.
- **HSpace:** defines the size of the horizontal gap.
- **VSpace:** defines the size of the vertical gap.
- **Align:** specifies the alignment of the image. You can choose from: Left, Abs Bottom, Abs Middle, Baseline, Bottom, Middle, Right, Text Top or Top.












Press **OK** to save the changes.

To make the picture into an active hyperlink, click on the Link tab and follow the instructions outlined in the hyperlink section of this document.

- Insert/Edit a table

Additional features

Additional toolbar features include:

-  - Select all items on the template
-  - Remove all formatting from the selected item
- B** - Change selected text format to bold
- I* - Change selected text format to italic
- U - Change selected text format to underline
- ~~ABC~~ - Change selected text format to strike through
-  - Insert/Remove a numbered list
-  - Insert/Remove a bulleted list
-  - Decrease paragraph indent
-  - Increase paragraph indent
-  - Apply left justification to selected text
-  - Apply center justification to selected text
-  - Apply right justification to selected text
-  - Apply block justification to selected text
-  - Insert special characters

What browsers are compatible with the FCKeditor?

	Windows	Mac	Linux
Internet Explorer 5.5+	Yes	N/A	N/A
Firefox 1.5+	Yes	Yes	Yes
Safari 3.0+	Yes	Yes	N/A
Opera 9.5+	Yes	Yes	Yes
Netscape 7.1+	Yes	Yes	Yes
Camino 1.0+	N/A	Yes	N/A