

# Banner Enrollment Management Suite Relationship Management Expressions Training Workbook

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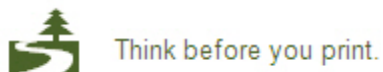
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#### **Revision History Log**

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4/3/2009	Revised to support Release 1.2.
10/09/2009	Revised to support Relationship Management 1.3 (new name and features).
01/07/2010	Revised to remove plus signs from screen shots of select attributes.
08/13/2010	Revised to support Relationship Management 1.4 (new tab name and functionality)

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# Expressions



## Workbook goal

In this section, you will build and maintain Expressions in Relationship Management.

## Intended audience

Administrators responsible for creating and managing Expressions at an institution.

# Expressions Introduction

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## Introduction

In this Workbook, you will be creating, managing and updating Expressions in Relationship Management. Expressions are used to define criteria by which prospective students are grouped into categories, primarily for purposes of creating Population Lists which can be used for targeted communications, campaigns or monitoring progress towards turning specific groups of Prospects into Applicants and Applicants into Admitted or Enrolled students.

Expressions are also used in creating Funnel Models.

More simply, an Expression will define who is in a particular population grouping and who is out of a particular population grouping.

# Create a New Expression

---

## Expressions

Expressions are used to define the criteria for inclusion or exclusion in a population grouping. Expressions are critical to many activities in Relationship Management. For example, if an institution aims to recruit more female students to science and engineering programs, it may wish to send specific communications to individuals meeting this profile. An Expression would allow the institution to select the prospects who meet the criteria for such communications.

Similarly, an institution may wish to distinguish between prospects who have not submitted an application from those who have started but not completed the application, or from those who have completed all application components. Expressions would allow the institution to identify both the number and the specific individuals who meet the respective criteria.

In short, Expressions determine "who's in" and "who's out" with respect to the criteria you select. Expressions are also used when building Funnel Models, building population lists to connect to campaigns, targeting communications and other functions within Relationship Management.

Note: A person must have a Recruit or Applicant record in the Banner database to show up in these searches as a prospect. If a person (for example, an employee) is present in Banner, but does not have a Recruit or Applicant record, that person will not show up. There are many ways to further segment the Prospect and Applicant pool using an Expression, for example, by limiting results by term.

# Expressions view

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

Users Roles Business Rules **Expressions** Funnels Ratings Tags Categories Organizations Communication Configuration

Expression Actions New Refresh Open Copy Delete More Actions Close

Expressions

Search by Name

Advanced Search

Displaying 52 rows.

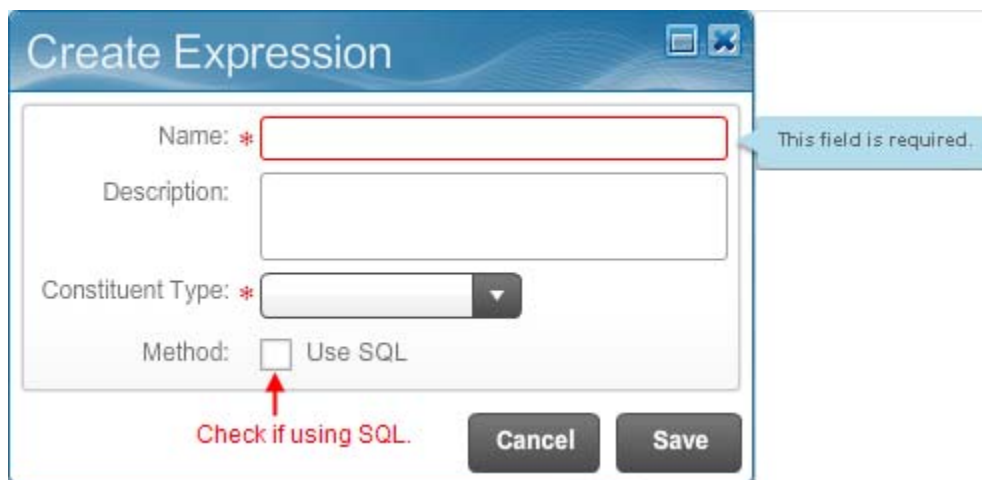
Expression Name	Description	Constituent Type	Population Count
Probability.Faid.Applied	Expression used for probability factor.	Prospect	1
DMM.E28		Student	1
DMM.E29		Student	1
DMM.E21		Prospect	1
Test Exp 1	Test Exp 1	Prospect	1
DMM.E7		Prospect	1
DMM.E30		Student	1
DMM.E8		Prospect	1
DMM.E23		Prospect	1
DMM.E26		Student	1
DMM.E22		Prospect	1
DMM.E24		Alumni & Friends	1
ADV PA Interests List -- Summer 2010		Alumni & Friends	9
ADV Individuals in PA Current PA alumni/friends		Alumni & Friends	14

Expression Results

Summary

## Steps to create a basic Expression:

1. From the Administration tab, click **Expressions**.
2. From the Expressions view, click **New** from the Expression Actions bar.



3. Enter a name for the Expression in the **Name** field.
4. If desired, enter a description for the Expression in the **Description** field.
5. Click drop-down arrow in the **Constituent Type** field and select a constituent type.
6. There are two options for creating Expressions:

**Attribute method:** This method includes three selection lists which can be used to narrow the categories of information, and select the predefined attributes needed to define the conditions in an Expression. The system builds the SQL query with attributes selected from these lists and pulls data from Banner tables.

**SQL method:** This method allows SQL statements to be entered and edited in order to build an Expression which may or may not be able to be built using the Attribute method mentioned above. A SQL statement can be directly typed or modified in the Statement field. The syntax of the statement can then be validated by clicking Validate Syntax. Selecting **Use SQL** is recommended only for advanced users who are familiar with the SQL database language.

Note: After an Expression is created using one method, it cannot be switched to use the alternate method.

7. Click **Save** to save the new Expression.
8. At this point, the shell for the Expression has been created. The next step will be



to define the criteria for the Expression.

# Add Conditions to an Expression using Expression Builder

Conditions must be added to an Expression for the Expression to be meaningful. These conditions mandate the circumstances under which the Expression evaluates correctly.

## Expressions view

The screenshot displays the 'Expression Builder' interface for the 'Biology.Major' expression. The interface is divided into several sections:

- Navigation Bar:** Includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. It also features a 'Help' button and a 'Sign Out' link.
- Left Sidebar:** Contains a 'Expressions' section with a sub-menu for 'Expression Details' and 'Expression Results'.
- Expression Actions:** A toolbar with icons for New, Refresh, Open, Copy, Delete, and More Actions.
- Expression Overview:** A section providing details about the expression:
  - Description:** 2010 Biology Major prospects
  - Creator:** admin
  - Constituent Type:** Prospect
  - Method:** Expression Builder
- Tags:** A section for adding tags, currently empty.
- Expression Conditions:** A section for defining conditions:
  - Description:** Where Field Of Study Equals [User-supplied value(:1)] and Curriculum Term Equals [User-supplied value(:2)]
- Save as Population List:** A button at the bottom right of the main content area.
- Right Sidebar:** Contains two panels:
  - Expression Results:** Displays the population size (21), last calculated date (Aug 02, 2010 12:54 PM), and user-supplied values (Field Of Study Equals (:1) Biology, Curriculum Term Equals (:2) Fall 2010). It includes 'Recalculate' and 'Review' buttons.
  - Summary:** Provides a quick overview of the expression, including its description, creator, constituent type, and method.

## Steps to add conditions to an Expression:

9. From the Expressions view, double-click on the Expression to view its information.

The screenshot shows the 'Expressions' list view in the software. The left sidebar contains a navigation menu with options: Users, Roles, Business Rules, Expressions (selected), Funnels, Ratings, Tags, Categories, Organizations, and Communication Configuration. The main area displays a table of expressions. The 'Biology.Major' expression is highlighted in green. The table has columns for Expression Name, Description, Constituent Type, and Population Count. The right sidebar shows the 'Expression Results' for the selected expression, including Population (21), Last Calculated (Aug 02, 2010 12:54 PM), By (admin), and User-supplied Values. Below this is a 'Summary' section with details for 'Biology.Major'.

Expression Name	Description	Constituent Type	Population Count
MM.DocExpression		Student	
efd1		Student	
Bio_Lab_Open	test	Prospect	
test sets		Student	275
ADV Individuals in PA		Alumni & Friends	
Student Undergradua	test	Student	0
Probability.Dem.InStat	Expression used for probability factor.	Prospect	
<b>Biology.Major</b>	2010 Biology Major prospects	Prospect	21
Probability.Fald Apple	Expression used for probability factor.	Prospect	
Probability.Inter.1or0	Expression used for probability factor.	Prospect	
Probability.Dem.ZipCc	Expression used for probability factor.	Prospect	
Probability.Inter.Camp	Expression used for probability factor.	Prospect	
Probability.Dem.LowP	Expression used for probability factor.	Prospect	
Probability.Inter.More	Expression used for probability factor.	Prospect	
test sets under 50		Student	5
testing 54		Student	0
MM.Classification		Student	1

This view displays the details of the Expression, including the basic attributes, existing conditions, affiliated SQL statement (if any), a summary of the attributes, and the results of the Expression when evaluated.


The screenshot shows the 'Expression Details' view for the 'Biology.Major' expression. The left sidebar has a navigation menu with options: Expressions (selected), Expression Details (selected), and Expression Results. The main area displays the 'Expression Overview' section with details: Description (2010 Biology Major prospects), Creator (admin), Constituent Type (Prospect), and Method (Expression Builder). Below this is the 'Expression Conditions' section with the description: 'Where Field Of Study Equals [User-supplied value(1)] and Curriculum Term Equals [User-supplied value(2)]'. The right sidebar shows the 'Expression Results' for the selected expression, including Population (21), Last Calculated (Aug 02, 2010 12:54 PM), By (admin), and User-supplied Values. Below this is a 'Summary' section with details for 'Biology.Major'.

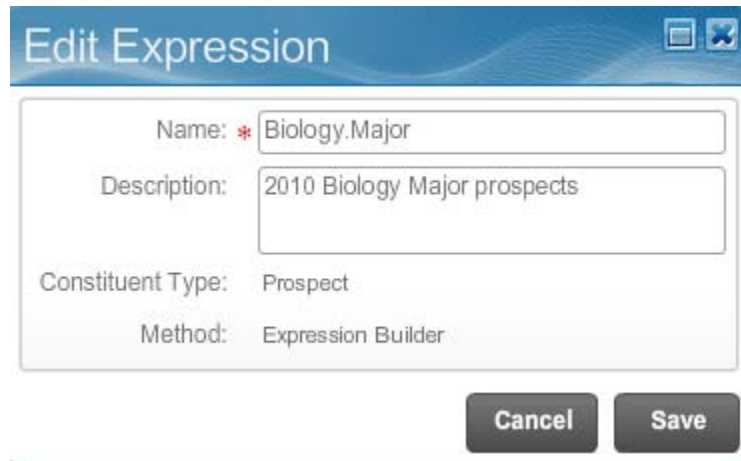
**Expression Overview**

Description: 2010 Biology Major prospects  
Creator: admin  
Constituent Type: Prospect  
Method: Expression Builder


**Expression Conditions**

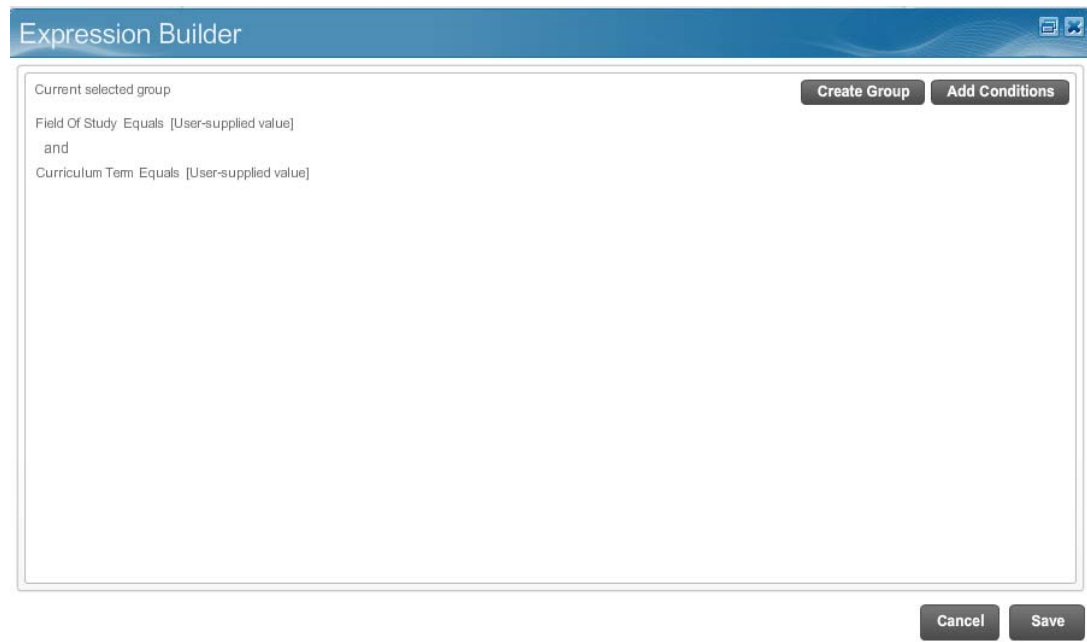
Description: Where Field Of Study Equals [User-supplied value(1)] and Curriculum Term Equals [User-supplied value(2)]

10. To edit the basic attributes of the Expression, click the **Edit** () icon in the Overview section. Make changes as necessary and click **Save**.



The 'Edit Expression' dialog box has a blue header bar with the title 'Edit Expression' and two window control icons. Below the header is a light gray form area with four labeled fields: 'Name: \*' with the value 'Biology.Major', 'Description:' with the value '2010 Biology Major prospects', 'Constituent Type:' with the value 'Prospect', and 'Method:' with the value 'Expression Builder'. At the bottom right of the form are two dark gray buttons labeled 'Cancel' and 'Save'.

11. In the Expression Conditions section, click the Edit () icon to open Expression Builder.



The 'Expression Builder' dialog box has a blue header bar with the title 'Expression Builder' and two window control icons. Below the header is a large white area for building expressions. At the top right of this area are two dark gray buttons labeled 'Create Group' and 'Add Conditions'. The main area contains the text 'Current selected group' followed by 'Field Of Study Equals [User-supplied value]', 'and', and 'Curriculum Term Equals [User-supplied value]'. At the bottom right of the dialog are two dark gray buttons labeled 'Cancel' and 'Save'.

12. Click **Add Conditions** to add conditions to the Expression. Any existing conditions will appear in the Expression Preview section.

The screenshot shows the 'Expression Builder' window. At the top is the title bar 'Expression Builder'. Below it is the 'Attribute Selection Menu' section. On the left, under 'Select Attribute', is a list of categories: Academic, Admissions Application, Constituent, Curricula (highlighted), and Populations. Each category has a right-pointing arrow icon. In the center, 'Program of Study' is selected. On the right, there is a 'Filter By Name' search box and a list of sub-attributes: Campus, College, Curriculum Level, Curriculum Term (highlighted), and Degree. Below this list, a description for 'Curriculum Term' is provided: 'Curriculum Term: Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]'. To the right of this description is the text 'Selected Attribute Definition' and two buttons: 'Back' and 'Add Values'. Below the selection menu is the 'Expression Preview' section, which shows the preview text: 'Where Field Of Study Equals [User-supplied value] and Curriculum Term Equals [User-supplied value] and Curriculum Term Equals'. Below this is the text 'Preview of Expression Selected'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

13. Select Attributes from the leftmost box under **Select Attribute**.

- Selecting an Attribute with an ➤ icon indicates that more sub-Attributes will appear in the next column.
- To search for Attributes by keyword, enter the desired keywords in the **Filter by Name** field at the upper right of this screen.

A description of the selected Attribute is provided under the Attribute selection table. Example: *Current Term: Selects the persons with the term specified, in either the Application or Recruit record.*

14. Use the Values drop-down box to select the desired operators.

For example, a mathematical attribute might have values such as *Equals*, *Does Not Equal*, *Is Greater Than*, *Is Less Than*, etc., while others might have operators such as *Is Member Of* and *Is Not Member Of*.

Note: The Values selection box is case-sensitive, which will affect what it returns for certain inputs. For example, when selecting States, entering *ID* would return Idaho but entering *id* would return the first State that contains the string *id*, which is Florida.

**Expression Builder**


**Select Values**

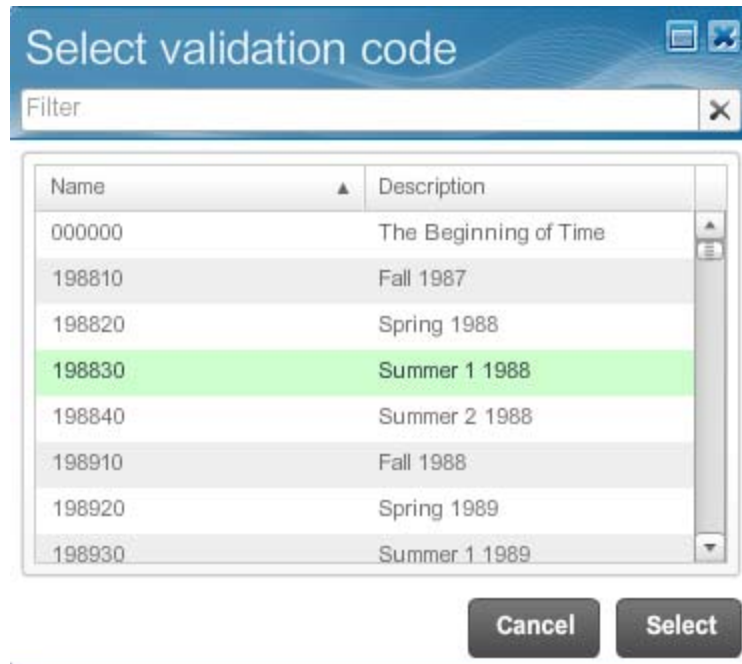
**Curriculum Term:** Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]

Values: **Equals** ☐ Prompt user for values during Expression execution

**▼ Expression Preview**

Where Field Of Study Equals [User-supplied value] and Curriculum Term Equals [User-supplied value] and Curriculum Term Equals

15. Click the  button next to the blank field to open the validation codes from Banner. Find the appropriate code by either scrolling through the list or typing the search criteria in the filter field.



The dialog box titled "Select validation code" features a search filter at the top. Below the filter is a table with two columns: "Name" and "Description". The table contains several rows, with the row for "198830 Summer 1 1988" highlighted in green. At the bottom of the dialog are "Cancel" and "Select" buttons.

Name	Description
000000	The Beginning of Time
198810	Fall 1987
198820	Spring 1988
198830	Summer 1 1988
198840	Summer 2 1988
198910	Fall 1988
198920	Spring 1989
198930	Summer 1 1989

16. Click  to save the selection.

17. If an OR operator must be added to the Expression, click **Select to add another** and repeat the steps used for adding the first value.

Select to add another

The screenshot shows the 'Expression Builder' window. The 'Select Values' section is active, displaying the 'Curriculum Term' attribute with a description: 'Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]'. Below this, the 'Values' section shows a dropdown menu set to 'Equals' and a checkbox for 'Prompt user for values during Expression execution'. A text input field contains 'Fall 2010', followed by a clear button, an 'or' operator, and a 'Select to add another' button. At the bottom of the 'Select Values' section are three buttons: 'Back to Attributes', 'Add Another Condition', and 'Complete'. The 'Expression Preview' section below shows the resulting expression: 'Where Field Of Study Equals [User-supplied value] and Curriculum Term Equals [User-supplied value] and Curriculum Term Equals Fall 2010'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

Refer to the Expression Preview section to review the values which have been added to the Expression.

18. To add additional conditions, click the **Add Another Condition** button. This will save the current selection and navigate back to the **Attribute Selection** screen to select additional criteria.

Add Another Condition



19. Select the next Attribute for the Expression and click

**Complete**

The screenshot shows the 'Expression Builder' window with the 'Select Values' tab active. The 'Curriculum Term' attribute is selected, with a description: 'Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]'. The 'Values' section shows 'Equals' selected in the dropdown, and the 'Prompt user for values during Expression execution' checkbox is unchecked. A text box contains 'Fall 2010'. At the bottom right are buttons for 'Back to Attributes', 'Add Another Condition', and 'Complete'. Below the dialog is a blue bar with a dropdown arrow and the text 'Expression Preview'.

20. If the user should be prompted to input a value when the Expression is evaluated, select the **Prompt user for values during Expression execution** check box in the **Select Values** screen.

This screenshot shows the 'Select Values' dialog box with the 'Prompt user for values during Expression execution' checkbox now checked. The 'Description' field is visible and contains the same text as the attribute description. The 'Default Value' is set to 'Fall 2009'. The 'Back to Attributes', 'Add Another Condition', and 'Complete' buttons remain at the bottom right. Below the dialog, the 'Expression Preview' section shows a preview of the expression: 'Where Field Of Study Equals [User-supplied value] and Curriculum Term Equals [User-supplied value] and Curriculum Term Equals [User-supplied value(default=Fall 2009)]'. At the bottom right of the entire window are 'Cancel' and 'Save' buttons.

21. Enter or edit a description of the parameter that will be supplied when the Expression is executed. The Description field is only available when the **Prompt user for values during Expression execution** item is selected.

22. Specify a default value following the instructions provided. In this example, supply the name of the Communication template.

This default value for the parameter will be used if no value is supplied when the Expression is executed. A default value is not required, but supplying one will ensure that the Expression has a value at execution time. The Default Value field is only available when the **Prompt user for values during Expression execution** item is selected.

23. Once the condition has been successfully added, click **Add Another Condition** to add another condition to the Expression (which will also create an AND operator between them) or click **Back to Attributes** to return to the attribute selection view. Click **Complete** to view the completed Expression.

The screenshot shows the 'Expression Builder' window. The title bar is blue with the text 'Expression Builder' and a small icon on the right. The main content area is white and contains a list of conditions under the heading 'Current selected group'. The conditions are:

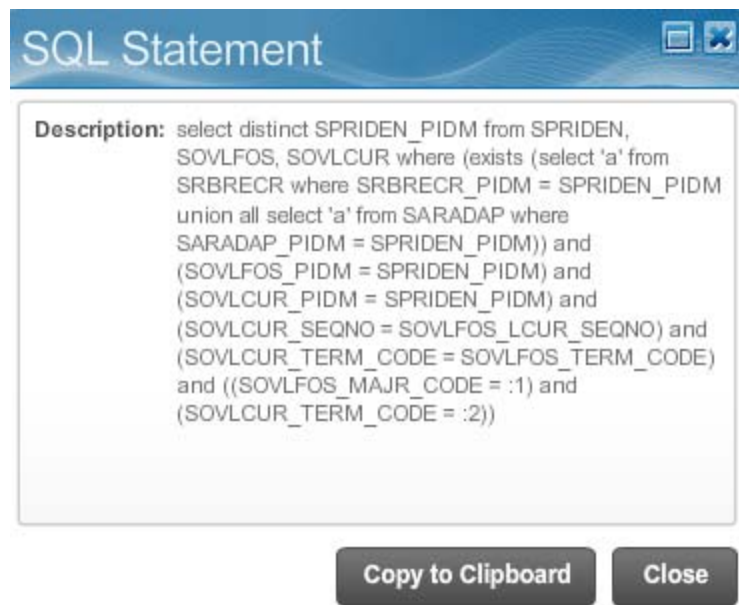
- Field Of Study Equals [User-supplied value]
- and
- Curriculum Term Equals [User-supplied value]
- and
- Curriculum Term Equals [User-supplied value(default=Fall 2009)]

At the top right of the main content area, there are two buttons: 'Create Group' and 'Add Conditions'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

24. To view the SQL statement that is generated by Expression Builder, select **View SQL** from **More Actions** on the toolbar.



The **SQL Statement** window opens. This information can be copied to the Clipboard and pasted elsewhere if needed.



## Edit Expression Conditions

1. To edit Expression conditions, click the pencil icon next to **Expression Conditions**.

The screenshot shows a web interface for editing an expression. At the top is a blue header with the text 'Biology.Major'. Below this is a section titled 'Expression Overview' with a pencil icon in the top right corner. This section contains the following details: 'Description: 2010 Biology Major prospects', 'Creator: admin', 'Constituent Type: Prospect', and 'Method: Expression Builder'. Below the overview is a 'Tags' section with an 'Add Tag' link and a tag icon. The bottom section is titled 'Expression Conditions' and has a red box around its pencil icon. The description for this section reads: 'Where Field Of Study Equals [User-supplied value(:1)] and Curriculum Term Equals [User-supplied value(:2)]'. A mouse cursor is pointing at the 'Expression Conditions' title.

2. Within the Expression Condition Description, click the condition which needs to be edited, or click on the pencil icon to open all of the attribute conditions and values.
3. Select a new attribute and click **Add Values** to change the condition and values, or simply click Add Values to change the value of the original condition.
4. Make changes to the condition values.
5. Click **Complete** to complete the editing of the condition and designate the condition is ready to be saved.
6. Click **Save** to save the condition.

## Delete Expression Conditions

In the Expression Builder screen, mouse over the condition which needs to be deleted.



Once the condition is highlighted, two icons appear:



The **Edit (Pencil)** icon can be used to edit the highlighted condition.



The **X** icon will delete the condition from the Expression.

# Using Groups in Expression Builder

---

When building Expressions in Expression Builder, there may be cases where it is impossible to construct the desired population using conditions only. The Expression Builder allows creation of more complex logical structures through Groups and Inner Groups. For example, an institution may have different admissions criteria for participation in certain academic programs for in-state and out-of-state residents, or for traditional and non-traditional students. Such cases could require the use of Groups and Inner Groups.

## What is a group?

A group joins together multiple conditions within an Expression. Create a group when there is more than one condition that must be fulfilled by the Expression. Wherever parentheses are required in a SQL statement, a group must be added to the Expression.

A group added to a statement is joined by the “and” operator. Groups included in the statement at the same hierarchical level are joined by the “or” operator. A set of groups is joined to the rest of the statement using the “and” operator.

## What is an inner group?

An inner group joins multiple conditions within the parent group of an Expression. Create an inner group when the Expression requires another level of evaluation. The parent group filters the entire population. The inner group further filters the population and retrieves a subset of the parent group.

An inner group must use at least one “or” condition. In the following example, the decision codes are only checked for those applicants in the parent group, applicants for Fall 2009.

Example:

- Parent group = select all Applicants for Fall 2009
- Inner group = application decision is “Pending Decision” or “Department Approval”

## Outer Joins

Relationship Management does not support Expressions that use Outer Joins, which involve data coming from multiple Banner tables.

For example, there may be a need to identify a group of prospects who have a recruit record or an applicant record by looking at SRARECR or SARADAP. If all of the prospects have lines in both tables, then results will be queried on all of the students. However, if some of the students have records in only one of the tables, but not both, then those students would not be captured in the Expression.

	<b>SRARECR</b>	<b>SARADAP</b>	<b>Outcome</b>
Prospect One	Yes	Yes	Captured in the Expression results
Prospect Two	Yes	Yes	Captured in the Expression results
Prospect Three	No	Yes	Dropped from the Expression results
Prospect Four	Yes	No	Dropped from the Expression results

Although there are a total of four prospects who have a recruit or an applicant record, the Expression results would show a list of only two individuals because the Expression Builder in Relationship Management does not support Outer Joins.

To reach this population, it is possible one could work with technical support staff to develop a SQL Expression. However, a simpler solution would be to construct two separate Expressions: one for prospects with a recruit record, and one for those with an applicant record. A population list could then be built that uses both Expressions and thereby captures all appropriate prospects.

## Groups and OR operators

When OR operators within a specific condition are required, you can use the **Select to add another** function while creating the condition.

Expression Builder

Select Values

**Field Of Study:** Selects persons with the field(s) of study specified. May be used in combination with Field Of Study Type. Should be used with the Learner Type attribute and the appropriate curriculum term attribute (Curriculum Term or Student Curriculum Term) for meaningful results. [SOVLFOFOS\_MAJR\_CODE]

Values: Equals ☐ Prompt user for values during Expression execution

Biology ... or Accounting ... or **Select to add another**

Back to Attributes Add Another Condition Complete

▼ Expression Preview

Where Field Of Study Equals Biology or Accounting

Cancel Save

However, clicking **Add another Condition** from the Select Values screen automatically puts an AND operator between conditions.

Expression Builder

Create Group Add Conditions

Current selected group

Field Of Study Equals Biology

and

Curriculum Term Equals Fall 2010

Therefore, if an OR operator is required between conditions, use groups and/or a combination of inner groups.



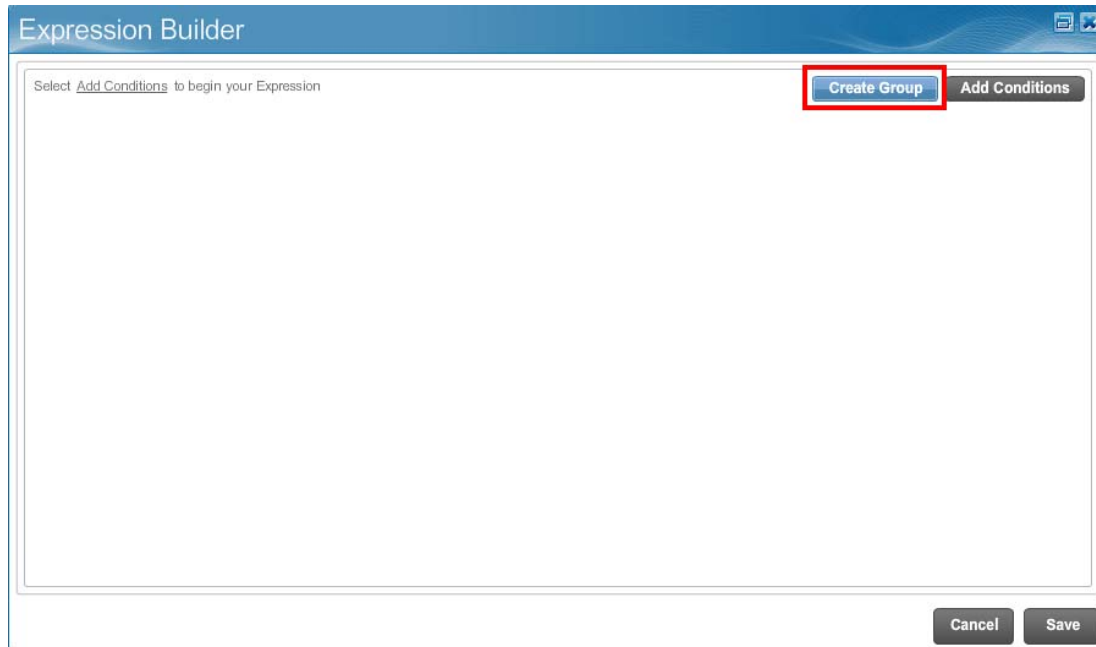
To demonstrate, below is an Expression that will find prospects from Delaware and Pennsylvania with the following characteristics:

- Either Delaware or Pennsylvania
  - Age of prospect is 21 or less AND Prospect has high school GPA of 3.8 or above;
- OR
- Age of prospects is 22 or above AND High School GPA is greater than 2.8

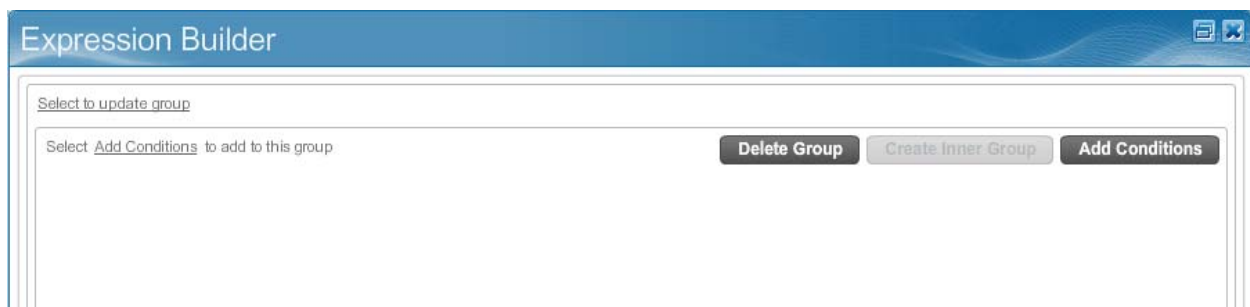
Groups will be used to accomplish this.

## Steps to incorporate groups into an Expression:


1. Follow the steps from **Add Conditions to an Expression** to access Expression Builder and build a valid Expression.
2. When you wish to add a group to your Expression, click **Create Group**.

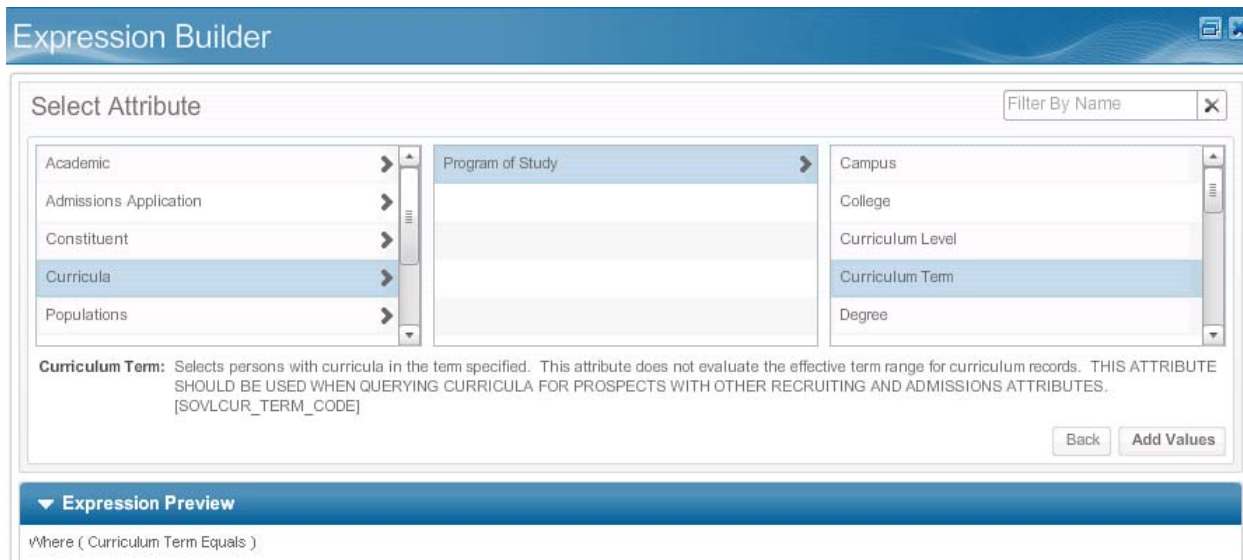


3. This opens a sub-window within Expression Builder.



Note that where one group exists, at least one other group must exist to form the other side of the OR operator.

4. Click **Add Conditions**  to add conditions to the group following the instructions outlined in the previous lesson. In this example, the first group will be prospects from Delaware.



**Expression Builder**

Select Attribute Filter By Name

Academic  
Admissions Application  
Constituent  
**Curricula**  
Populations

Program of Study

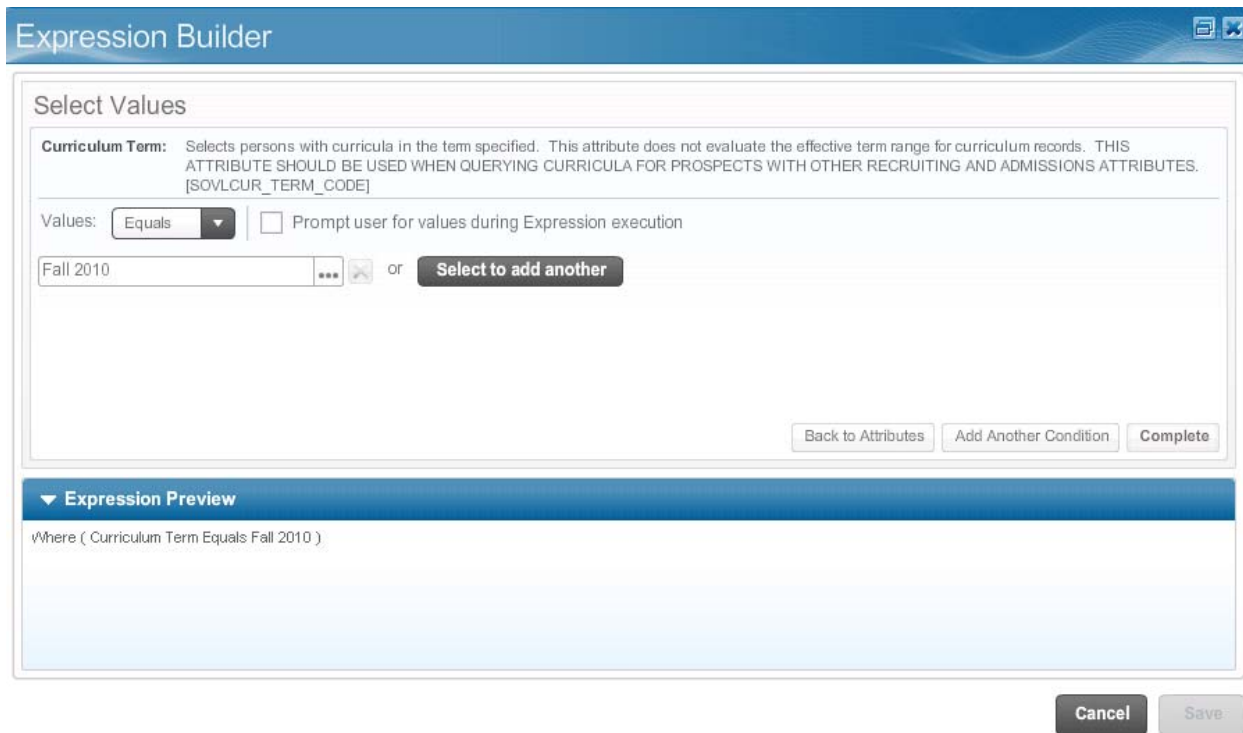
Campus  
College  
Curriculum Level  
**Curriculum Term**  
Degree

**Curriculum Term:** Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]

Back Add Values

▼ Expression Preview

Where ( Curriculum Term Equals )



**Expression Builder**

Select Values

**Curriculum Term:** Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]

Values: Equals ☐ Prompt user for values during Expression execution

Fall 2010 ... or Select to add another

Back to Attributes Add Another Condition Complete

▼ Expression Preview

Where ( Curriculum Term Equals Fall 2010 )

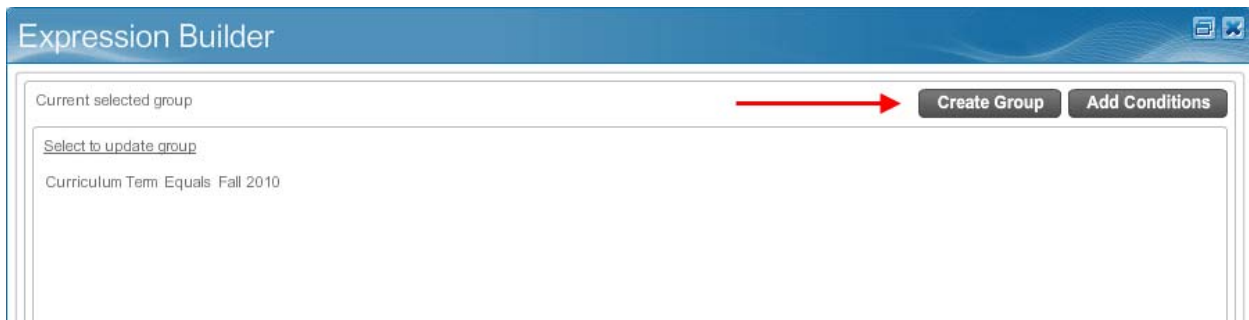
Cancel Save

5. We have our first group **1**.

Next, click in the white space outside of the newly created group **2**.



6. Notice that the buttons on the right have changed. Click **Create Group**.



7. You now have two groups. Notice that the first group and second group have an OR operator between them.

The screenshot shows the 'Expression Builder' window. It has a title bar with the text 'Expression Builder' and standard window controls. The main area is divided into two sections by the word 'or'. The top section is titled 'Select to update group' and contains a single condition: 'Curriculum Term Equals Fall 2010'. The bottom section is titled 'Select Add Conditions to add to this group' and is currently empty. To the right of this section are three buttons: 'Delete Group', 'Create Inner Group', and 'Add Conditions'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

8. Add conditions to the second group by clicking **Add Conditions** within that window, using 'Where State equals Pennsylvania'.
9. You can create groups within groups by clicking **Create Inner Group**. As with ordinary groups, inner groups must also be created in pairs.

This screenshot shows the 'Expression Builder' window after adding a second group. The top section remains the same with 'Curriculum Term Equals Fall 2010'. The bottom section now has a title 'Current selected group' and contains the condition 'Field Of Study Equals Biology'. The 'Create Inner Group' button is highlighted with a red rectangular box. The 'Delete Group', 'Add Conditions', 'Cancel', and 'Save' buttons are also visible in their respective positions.

10. Continue to add groups and conditions until the Expression is complete.

The screenshot shows the 'Expression Builder' window. It contains three main sections, each starting with a 'Select to update group' link. The first section contains 'Curriculum Term Equals Fall 2010'. The second section, preceded by 'or', contains 'Field Of Study Equals Biology' and 'Banner Population Selections Equals <STUDENT><199510\_NEW\_UG\_TRAN><SAISUSR><SAISUSR>'. The third section, preceded by 'or', contains 'Current selected group' and 'Curriculum Level Equals Undergraduate'. To the right of the third section are three buttons: 'Delete Group', 'Create Inner Group', and 'Add Conditions'. At the bottom right of the window are 'Cancel' and 'Save' buttons.

11. To remove a group or inner group from your Expression, click the **Delete Group** button.



12. To return to an earlier group and edit its conditions, click that group's **Select to update group** link.

This screenshot shows a portion of the Expression Builder interface. It features the text 'Current selected group' above a box. Inside the box, the link 'Select to update group' is highlighted in yellow, and below it, the text 'Curriculum Term Equals Fall 2010' is visible.

13. When you are satisfied with your grouped conditions, click **Save** to save your changes.

The screenshot shows the 'Create an Expression - Groups' window in the SunGard Higher Education Banner Enrollment system. The interface includes a top navigation bar with tabs for Profile Manager, Campaigns, Communications, and Administration. The left sidebar contains a tree view with 'Expressions' selected, showing 'Expression Details' and 'Expression Results'. The main content area is titled 'Create an Expression - Groups' and contains two sections: 'Expression Overview' and 'Expression Conditions'. The 'Expression Overview' section shows a description, creator, and method. The 'Expression Conditions' section displays a complex logical expression for filtering data based on state, age, and high school GPA. A 'Save as Population List' button is located at the bottom right of the main content area.

Profile Manager Campaigns Communications Administration Preferences Sign Out

Expressions

Expression Actions New Refresh Open Copy Delete More Actions Close

Expression Details

Expression Results

Open Items

Expressions

Create an Expression - Groups

### Create an Expression - Groups

#### Expression Overview

Description: How to create an expression with groups.  
Creator: rreser  
Method: Expression Builder

#### Expression Conditions

Description: Where ( State Equals Delaware and ( ( Age Less Than or Equal To 21 and High School GPA Greater Than or Equal To 3.8 ) or ( Age Greater Than 22 and High School GPA Greater Than 2.8 ) ) ) or ( State Equals Pennsylvania and ( ( Age Less Than or Equal To 21 and High School GPA Greater Than or Equal To 3.8 ) or ( Age Greater Than or Equal To 22 and High School GPA Greater Than 2.8 ) ) )

Save as Population List

SUNGARD HIGHER EDUCATION Banner Enrollment

# Add Conditions to an Expression using SQL

---

## Using SQL

As previously noted, the Conditions within an Expression define the criteria to include or exclude prospects from a list. The Expression Builder in Relationship Management offers many options for filtering specific populations from among your institution's prospects, but there may be times when you wish to filter on additional data elements that are not available in the Expression Builder. Using SQL to create the Expressions would assist in such cases.

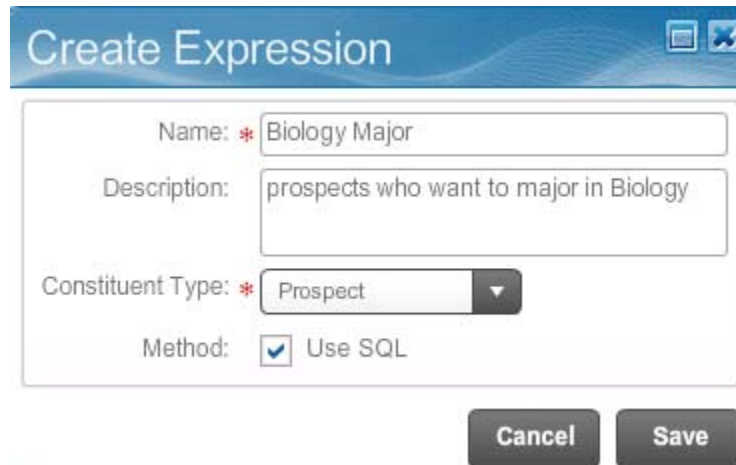
Creating Expressions using SQL instead of the Expression Builder requires knowledge of SQL. This responsibility is typically limited to certain technical staff, given the complexity associated with this activity. Only staff members who fully understand the potential resource implications of SQL statements on the production database should use this functionality and only after thorough testing has been conducted.

Note: You cannot edit SQL statements for Expressions that have been built using Expression Builder. The steps in this lesson are only applicable to Expressions created with the **Use SQL** check box selected.



## Steps to add conditions using SQL:

1. Create a new Expression.
2. For Method, check the **Use SQL** box.










The screenshot shows a 'Create Expression' dialog box with a blue header bar. Inside the dialog, there are four fields: 'Name' with a red asterisk, 'Description', 'Constituent Type' with a red asterisk, and 'Method'. The 'Name' field contains 'Biology Major', the 'Description' field contains 'prospects who want to major in Biology', and the 'Constituent Type' dropdown is set to 'Prospect'. The 'Method' section has a checked checkbox next to 'Use SQL'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Name: *	Biology Major
Description:	prospects who want to major in Biology
Constituent Type: *	Prospect
Method:	<input checked="" type="checkbox"/> Use SQL


Cancel Save

3. Save the Expression.


4. To edit the SQL statement itself, click the **Edit** () icon in the SQL Statement section. If no SQL statement exists, you can also click on **Add SQL Subquery**.

Expression Actions      More Actions 


Biology.Majors

**Expression Overview** 

**Description:** Prospect who want to major in Biology.  
**Creator:** admin  
**Constituent Type:** Prospect  
**Method:** SQL

**Tags** 

[Add Tag](#)

**SQL Subquery** 

**Description:** [Add SQL Subquery](#)

**Parameters**

ID	Name	Description	Type	Default Value	Attribute

Save as Population List

5. Edit the SQL statement in the **Add SQL Subquery** field. Note that the required statement at the beginning is part of the overall statement, so that the **Additional SQL Statements** field will typically begin with either an operator or a comma.

The screenshot shows the 'Expression Builder' dialog box with the 'SQL Subquery' tab selected. The 'Statement' field is empty. Below it, the 'Validation Results' section shows a message: 'Click "Validate Syntax" to validate the SQL.' The 'Parameters' section contains a table with columns: ID, Name, Description, Type, Default Value, and Attribute. The table is currently empty. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

**Expression Builder**

**SQL Subquery**

The SQL subquery statement must select a single numeric column as SPRIDEN\_PIDM. It will be wrapped in a query statement that restricts the result set to unique Banner identifiers that are suitable for use with this application. For example: select xxxxxx\_PIDM as SPRIDEN\_PIDM from xxxxxx.

Statement:

Validate Syntax

Validation Results: Click "Validate Syntax" to validate the SQL.

**Parameters**

ID	Name	Description	Type	Default Value	Attribute

Define Attribute-Based Parameter Define Manual Parameter

Cancel Save

6. Click **Validate Syntax** to validate the syntax of your entered statement.
7. Click **Save** to save your SQL statement to your Expression.

# Creating Dynamic Parameters using SQL

---

## Introduction

Relationship Management's Expression Builder tool is used to construct specific queries for your database using Structured Query Language (SQL). SQL queries created in Relationship Management are called expressions. You execute an expression against your institution's Banner database and/or Relationship Management data and retrieve specific information that matches your criteria.

The Expression Builder offers two ways to create an SQL expression. You specify which method to use when you initially create an expression, either the "Attribute method" or the "SQL method."

- With the Attribute or User Interface (UI) method, you select from lists of pre-defined attributes and build SQL statements using point-and-click elements. The method provides ready-built parameters for ease of selection. A query is built using SQL statements, but user selects user-friendly attributes to create those statements.
- With the SQL method (sometimes called the "raw" SQL method), you type the exact SQL statements that you needed to build an expression. This method of creating expressions requires a thorough knowledge of SQL and relational database programming conventions.

Before release 1.2, dynamic prompts were available in the attribute method, but not the SQL method. If an individual chooses the SQL method to build an expression, the application now offers the advantage of dynamically prompting for input parameter values at the time of execution of the expression parameters. This works in the same manner as the dynamic prompting when executing an attribute-based expression.

You can use SQL expressions for building expressions for use in funnel models and rating models. These models can use expressions that have dynamic prompts for both term and student level attributes. Any defined expression attribute that selects term code or student level code is acceptable, with the exception of these:

- Funnel Instance Term
- Funnel Instance Level
- Probability Instance Term
- Probability Instance Level
- Desirability Instance Term
- Desirability Instance Level

## Adding Dynamic Parameters Using Attributes

Add parameter information by selecting the appropriate attribute and entering the value associated with the attribute just as you would when creating an Expression using Attributes.

The screenshot shows the 'Expression Builder' window. The 'Select Attribute' section has a search bar 'Filter By Name' and a list of attributes. 'Curricula' is selected in the left pane, and its description is shown in the center: 'Curriculum Term: Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR\_TERM\_CODE]'. The 'Expression Preview' section shows the text 'Where Curriculum Term Equals'. At the bottom are 'Cancel' and 'Save' buttons.

Attribute	Description
Academic	
Admissions Application	
Constituent	
Curricula	<b>Curriculum Term:</b> Selects persons with curricula in the term specified. This attribute does not evaluate the effective term range for curriculum records. THIS ATTRIBUTE SHOULD BE USED WHEN QUERYING CURRICULA FOR PROSPECTS WITH OTHER RECRUITING AND ADMISSIONS ATTRIBUTES. [SOVLCUR_TERM_CODE]

▼ Expression Preview

Where Curriculum Term Equals

## Adding Dynamic Parameters Manually

In the Expression Builder -

- Click the **Define Manual Parameter** button at the bottom of the Expression Builder and manually enter the desired information.

The screenshot shows the 'Expression Builder' window. The 'SQL Subquery' section contains a text area for the 'Statement:' and a 'Validate Syntax' button. Below this is the 'Parameters' section, which includes a table with columns: ID, Name, Description, Type, Default Value, and Attribute. At the bottom of the Parameters section are buttons for 'Define Attribute-Based Parameter' and 'Define Manual Parameter'. At the very bottom of the window are 'Cancel' and 'Save' buttons.

**SQL Subquery**

The SQL subquery statement must select a single numeric column as SPRIDEN\_PIDM. It will be wrapped in a query statement that restricts the result set to unique Banner identifiers that are suitable for use with this application. For example: select xxxxxx\_PIDM as SPRIDEN\_PIDM from xxxxxx

Statement:

Validate Syntax

**Validation Results:** Click 'Validate Syntax' to validate the SQL.

**Parameters**

ID	Name	Description	Type	Default Value	Attribute

Define Attribute-Based Parameter Define Manual Parameter

Cancel Save

The resulting expression with parameters displays both the actual SQL subquery and the parameters that match the subquery.

## Bio.Major

### Expression Overview

**Description:** 2010 Biology Majors  
**Creator:** admin  
**Constituent Type:** Prospect  
**Method:** SQL

### Tags

[Add Tag](#)

### SQL Subquery

**Description:** Select distinct SPRIDEN\_PIDM from SPRIDEN, SORINTS, SPBPERS, SPRADDR where (exists (select 'a' from SRBRECR where SRBRECR\_PIDM = SPRIDEN\_PIDM union all select 'a' from SARADAP where (SARADAP\_PIDM = SPRIDEN\_PIDM)) and (SORINTS\_PIDM = SPRIDEN\_PIDM) and (SPBPERS\_PIDM = SPRIDEN\_PIDM) and (SPRADDR\_PIDM = SPRIDEN\_PIDM) and sorints\_ints\_code = :1 and (spbpers\_sex = :2 and spraddr\_stat\_code = :3))

### Parameters

ID	Name	Description	Type	Default Value	Attribute
:1	Biology		Number	7	
:2	PIMD		String	11	
:3	Setate		String	8	

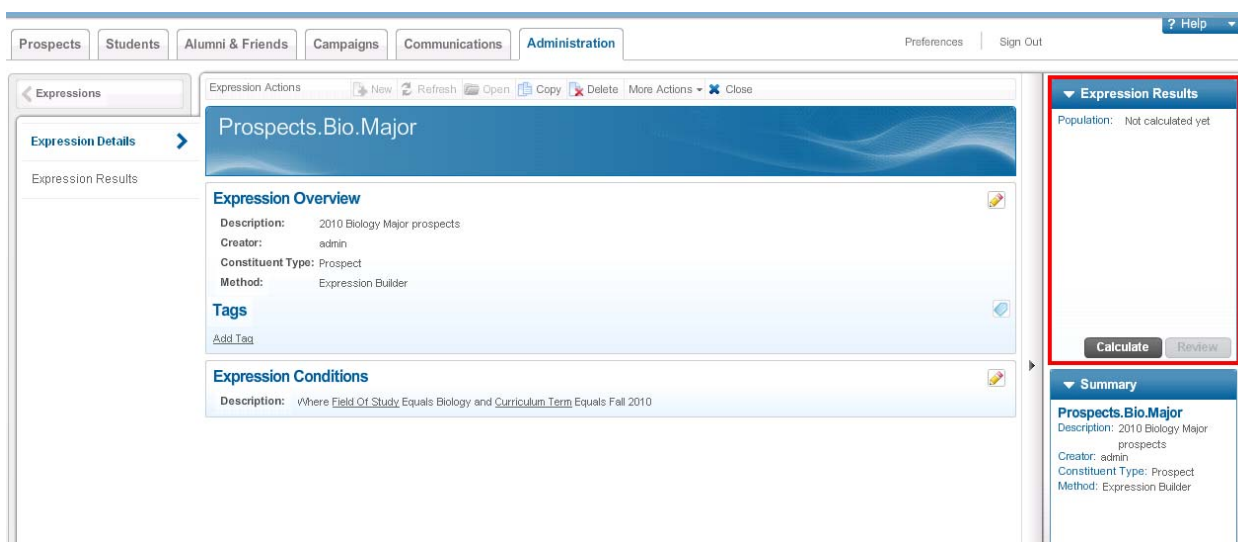
# Expression Results and Population Lists

## Introduction

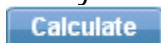
Once an Expression has been properly built, you may view the number of profiles pulled by the Expression, or save it as a Population List to view the actual profiles.

## Calculate Expression Results

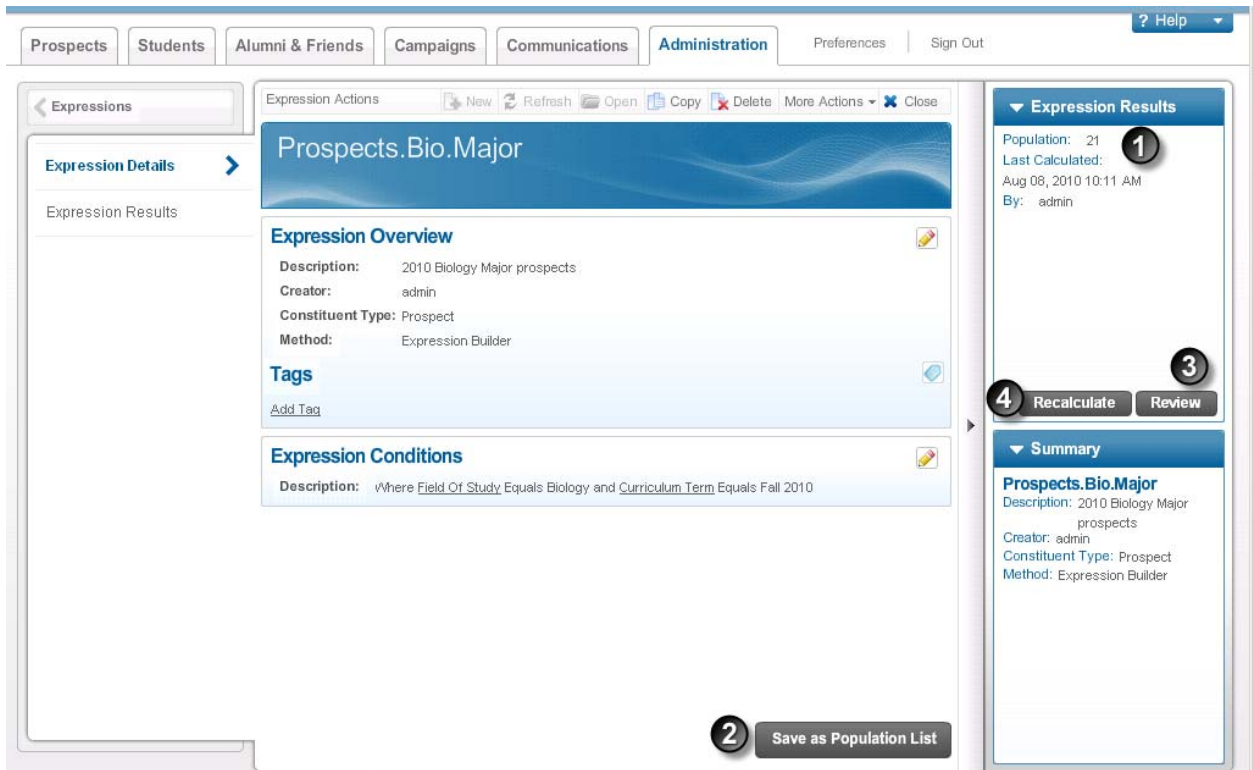
Expression Results are typically a group of profiles (or people) that satisfy an Expression's conditions. You calculate an Expression to retrieve from the Banner database the population defined by the Expression.



After you build an Expression, click **Calculate** to run the Expression.







- 1 The Expression is run and returns a group of results that meet the Expression criteria.
- 2 You have the option to save the results as a Population List. You can then view the individual profiles, and use the list when managing profiles and campaigns.
- 3 Use the Expression Results Review window to view the number of profiles returned.
- 4 If you make changes to the Expression and then return to **Expression Results**, use the **Recalculate** function to update the results. Note: It is not recommended to edit an Expression while that Expression is involved in an active calculation, or the results of that calculation may be erratic.

## Save as Population List

1. Click **Save as Population List** to save the Expression results as a Population List.

Save as Population List

2. Enter a name for the Population List.
3. Enter a description of the Population List. This is not required, but will provide overview information about the list.
4. Select either:

**Reference this Expression for future list refresh:** when you view the resulting Population List you will see the Expression associated with the Population List, and you will be able to recalculate the list to include any new profiles meeting the Expression criteria.

**Save this Expression's results:** you will not see the Expression when you view the Population List. This means that this Population List is a 'snapshot' and will not be recalculated to include new profiles.

5. Click **Save** to store the Expression as a Population List.

Save as Population List

Name: \*

Description:

Results Options: ☒ Reference this expression for future list refresh  
☐ Save this expression's results

Cancel Save

This field is required.

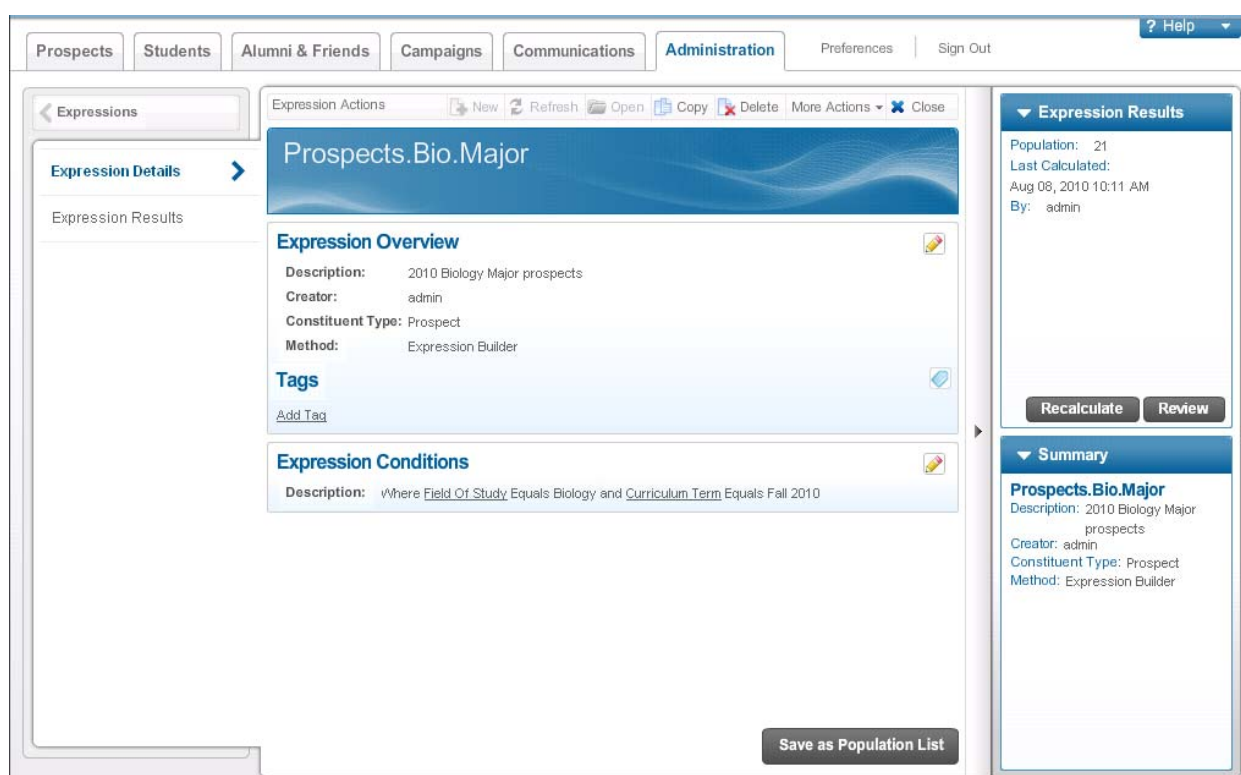
## Expression Results Review

When the Expression finishes running, click the **Review** button in the **Expression Results** panel.



This takes you to the **Expression Results** space.

Use the search function to locate a desired profile. You cannot view the entire list pulled by the Expression in the Expression Results panel; you must save as a Population List to do that. However, you can search for individual profiles that you expect to be in your Expression results.

The screenshot shows a web application interface for reviewing an expression. At the top is a navigation bar with tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is selected). To the right of the tabs are links for "Preferences" and "Sign Out", and a "Help" button. The main content area is divided into three panels. The left panel, titled "Expressions", contains a sub-panel "Expression Details" with a link to "Expression Results". The middle panel, titled "Prospects.Bio.Major", contains an "Expression Overview" section with fields for Description ("2010 Biology Major prospects"), Creator ("admin"), Constituent Type ("Prospect"), and Method ("Expression Builder"). Below this is a "Tags" section with an "Add Tag" link. The bottom section is "Expression Conditions" with a description: "Where Field Of Study Equals Biology and Curriculum Term Equals Fall 2010". At the bottom right of this panel is a "Save as Population List" button. The right panel, titled "Expression Results", contains a "Recalculate" button, a "Review" button, and a "Summary" section. The summary section lists the expression name, description, creator, constituent type, and method.

Note: You can double-click on the individual's name to go to the profile.

ProspectsStudentsAlumni & FriendsCampaignsCommunicationsAdministrationPreferencesSign Out? Help

Prospects.Bio.Major

Prospect Overview

Biographical

Academic

Personal Outlook

Recruitment

Ratings

Admission

Interaction

Profile ActionsNewRefreshOpenCopyDeleteMore ActionsClose

Madison Johnson

Biographical

Residence: In state ResidentEthnicity: CaucasianCitizenship: CitizenGender: Female

Academic

Program: BS in BiologyLevel: UndergraduateHigh School: Malvern High SchoolCollege:Major: BiologyDegree: Bachelor of ArtsGPA: 3.80Test Scores: SAT Mathematics 650; SAT Verbal 660

Personal Outlook

Interests: Envir or Ecology Activity; Honors or Ind. StudyAttributes:Sources:

Recruitment

Recruit Type:Student Type: 1st Time FreshmanRecruit Status:Geo Region:

Create InteractionContact

Recruit Track

Fall 2010-1 UG Biology

Profile Summary

CardFunnel History

Madison S Johnson

Banner Id: T00010051

610-555-1212 (Cell Phone)

Banner.Student@yahoo.com

102 Main Street  
Malvern, PA 19355  
County: Chester  
United States of America

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Relationship Management – Expressions

## Population Lists that use Expressions

When a Population List has been saved, the Expression that is associated with that particular Population List is 'saved' with it. Therefore, if you later change the Expression, the Population List that used the original Expression will not change. This is the case even if you select the 'Recalculate List' option shown below:

The screenshot displays the InState.Prospectors interface. At the top, there are navigation tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is currently selected. Below the tabs, there's a 'Population Actions' bar with buttons for New, Refresh, Open, Copy, and Delete. A 'More Actions' dropdown menu is open, showing options: Add Selected to New List, Edit Manually Added Profiles, Edit Excluded Profiles, Recalculate List (highlighted), and Copy to Clipboard. The main content area shows a table of prospect data with columns: Last Name, First Name, Middle Name, Birth Date, City, State, Zip, Gender, and Term. The table lists 15 prospects. On the right side, there's a sidebar with 'My Prospect List' and 'Population Summary' sections. The 'Population Summary' section shows 'Population Results' with a total of 805, last calculated on Aug 08, 2010 10:28 AM, and 'Manually Included' and 'Manually Excluded' counts both at 0.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Gender	Term
Aase	Devin	Keenan	Jun 20, 19	Arnot	Pennsylva	16911	Male	Fall 2010
Abril	Dominique	Garth	Apr 29, 19	Whitney	Pennsylva	15693	Male	Fall 2010
Alaimo	Billie	Korey	Jan 25, 19	Millersburg	Pennsylva	17061	Male	Summer 2
Alderson	Charley	Jackie	May 26, 19	Landenbe	Pennsylva	19350	Male	Fall 1993
Alejandro	Nelida	Rachal	Jun 22, 19	Winamac	Indiana	46996	Female	Summer 2
Allen	Sydney		Jan 01, 19	Malvern	Pennsylva	19355	Female	Fall 2010
Almeda	Chu	Yvette	Apr 13, 19	Elm	Pennsylva	17521	Female	Summer 2
Alpaugh	Andres	Gaston	Feb 05, 19	Bayamon	Puerto Rio	961	Male	Summer 2
Amarante	Lucy	Marva	Feb 27, 19	Arlington	Tennessee	38002	Female	Spring 199
Ando	Jeanett	Sammy	Jan 19, 19	Longbranc	Washingtc	98351	Female	Spring 20
Angell	Jeremy	Fritz	Apr 13, 19	Factoryville	Pennsylva	18419	Male	Summer 12
April	Hannelore	Pam	Jun 07, 19	Blandon	Pennsylva	19510	Female	Summer 19

If you wish to change the Expression and the associated Population List, you should edit and save the Expression, Recalculate it, and then save the results as a **new** Population List.

ProspectsStudentsAlumni & FriendsCampaignsCommunicationsAdministrationPreferencesSign Out? Help

Expressions

Expression Details>Expression Results

Expression ActionsNewRefreshOpenCopyDeleteMore ActionsClose

Biology.InState

Expression Overview

Description:In-State Biology Major Prospects  
Creator:admin  
Constituent Type:Prospect  
Method:Expression Builder

TagsAdd Tag

Expression Conditions

Description:Where State Equals Pennsylvania

Save as Population List

Expression Results

Population: 805  
Last Calculated:  
Aug 08, 2010 10:28 AM  
By: admin

RecalculateReview

Summary

Biology.InState

Description:In-State Biology Major Prospects  
Creator: admin  
Constituent Type: Prospect  
Method: Expression Builder

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Relationship Management – Expressions

# Exercises

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## Basic Expression

Create a basic Expression to identify all female prospects age 21 and over.

1. Create a new Expression.
2. Provide a name and description for the Expression, using the naming convention *YourLastName.Female.Over21*.
3. Add conditions to the Expression to select those prospects who meet your target criteria.  
  
**Do not** check **Use SQL**. This is an advanced option for individuals proficient in SQL.
4. After completing your Expression, select **Calculate** to determine the results. Compare your results to other participants.
5. Further refine your results by adding additional criteria to select non-resident prospects from within this population.
6. Recalculate your results. Compare your results to other participants.
7. View the results.
8. Save the results of this expression as a Population List named *YourLastName.Female.Over21.Nonresident*. You will use this list in later training activities.
9. Edit the name of your Expression to reflect the revised Expression criteria.

## Incorporating Groups

Create an Expression to identify potential candidates for state-funded scholarships created by the legislature in your state, to encourage enrollment in science-related programs offered at private or public institutions in your state. State residents are eligible with a high school GPA of 3.0; residents of your neighboring states are eligible with a high school GPA of 3.2 and above.

To ensure consistency in checking the results of your Expression, all participants in this training should use the same GPA criteria, as well as home state and neighboring states in defining the Expression.

Use Pennsylvania as the home state and use New Jersey, New York, and Ohio as neighboring states.

1. Begin by charting the Expression you need to create, in narrative format.
2. Create a new Expression. Use the naming convention *YourLastName.Science.Scholarship*.
3. Open the Expression Builder. You will need two groups in the Expression.
4. Add a condition to capture prospects who have specified biology, chemistry, or physics as an intended field of study.

(Do not add this condition if your institution does not populate this field for recruit records or if these majors are not offered at your institution. If participants do not use the same conditions, Expression results will vary by participant.)

5. Calculate your Expression. Compare your results with other participants.



Your Expression should be equal to the sum of in-state residents with a GPA of 3.0 or higher PLUS neighboring state residents with a GPA of 3.2 or higher. To verify this, do the following:

1. Create individual Expressions for both of these populations.
2. Use the following naming convention:
  - YourLastName.InState.Science.Scholarship
  - YourLastName.OutofState.Science.Scholarship
3. Add the conditions necessary to pull the appropriate prospects.
4. Calculate your lists and add the results totals to each other. These should equal the result of your Grouped Expression.
5. If the results do not align, review your Expression Criteria and/or view the Expression Results to identify discrepancies.

## Population Lists

1. Create Population Lists for each of your science scholarship Expressions. Please use the following naming conventions:
  - YourLastName.Science.Scholarship.Recruits
  - YourLastName.InState.Science.Scholarship.Recruits
  - YourLastName.OutofState.Science.Scholarship.Recruits

# Appendix A: Tags



# Tags

---

## Description

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

## Taggable items

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

- Expressions
- Populations
- Templates
- Campaigns
- Interactions

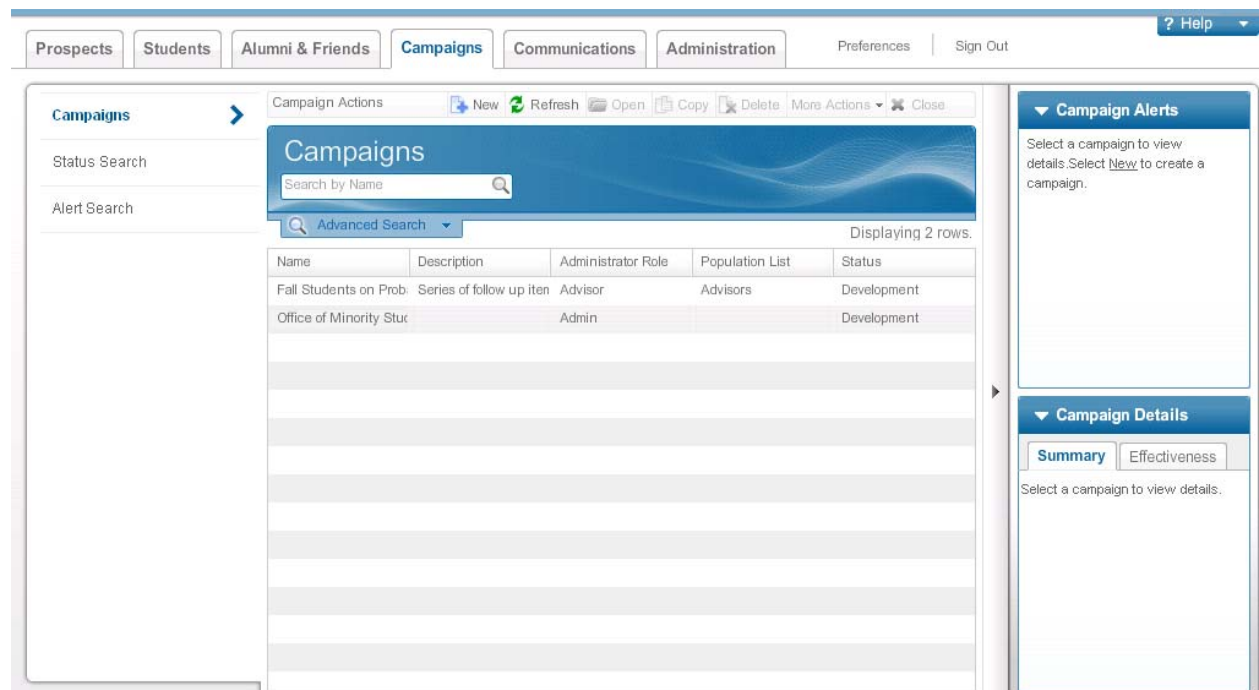
When working with expressions, tags can be incorporated into expression query criteria.

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

# Applying a Tag to an Item

## Steps

1. From the Campaigns tab, select the Campaigns menu.



2. Double-click on a campaign to open it, or click it to select it and click **Open** on the Campaign Actions toolbar.

3. The campaign will be displayed. Notice that the Tag Display icon is active.

The screenshot displays a web application interface for managing campaigns. At the top, a navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help button. Below the navigation bar, the left sidebar shows a 'Campaigns' section with an 'Overview' tab selected. The main content area is titled 'Office of Minority Student Affairs Guest Speaker Series' and contains a 'Campaign Overview' section. This section includes fields for Status (Development), Administrator Role (Admin), Population List, and Campaign Goal. Below these fields are sections for 'Tags' and 'Recurring Schedule', each with an 'Add' link. On the right side, a 'Campaign Details' panel shows a 'Summary' tab with fields for List, Add Population List, Initial List Count (0), Status (Development), and Effectiveness. At the bottom right of the main content area, there are 'Activate' and 'Start Campaign' buttons.

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

Campaign Actions New Refresh Open Copy Delete More Actions Close

Office of Minority Student Affairs Guest Speaker Series

**Campaign Overview**

Description

Status: Development

Administrator Role: Admin

Population List:

Campaign Goal:

**Tags**

Add Tag

**Recurring Schedule**

Add Schedule

Activate Start Campaign

**Campaign Details**

Summary Effectiveness

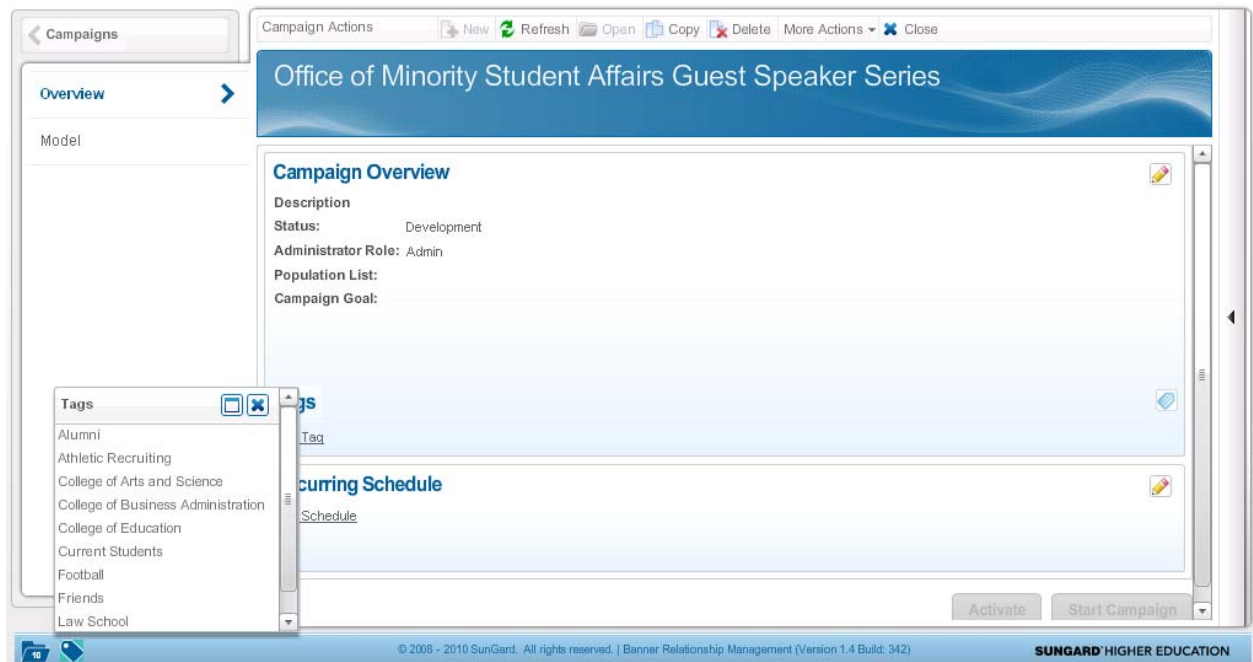
List:

Add Population List

Initial List Count: 0

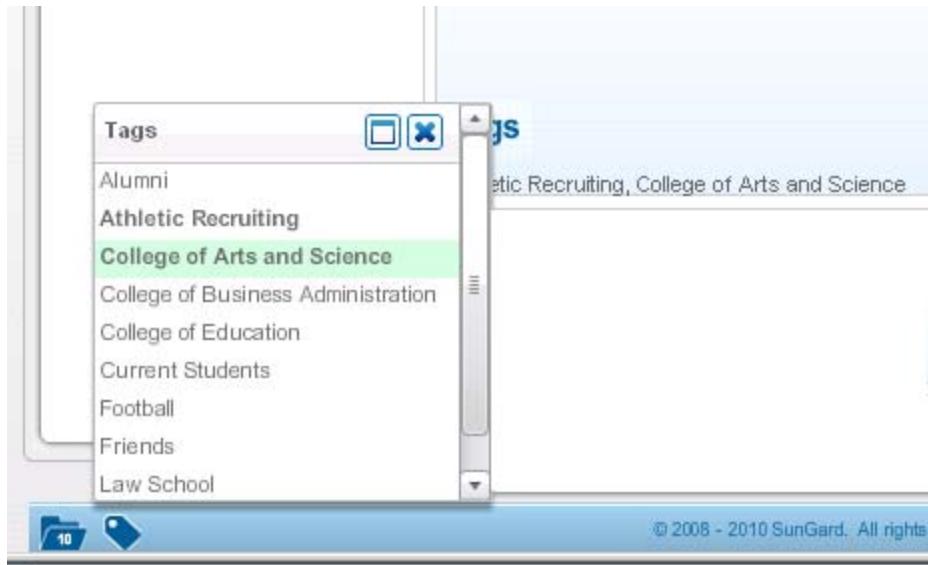
Status: Development

- Click the Tag Display (🔖) icon to open the Tag Display interface.



5. Click a tag in the Tag Display interface to apply it to the campaign.

Notice that the tag now appears in bold in the interface, and that a Tags list has been added to the item summary.



6. Repeat as necessary to add additional tags to this item.
7. If you wish to remove a tag, click it again to return it to normal status.

# View Items With A Specific Tag

## Introduction

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

The screenshot displays the Relationship Management system interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help icon. The left sidebar contains a list of menu items: Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags (highlighted with a blue arrow), Categories, Organizations, and Communication Configuration. The main content area is titled 'Tags' and features a search bar with the text 'Search by Name' and a magnifying glass icon. Below the search bar is an 'Advanced Search' button. A table displays a list of tags, with columns for Name, Added By, Added Date, and Count of Associate. The table shows 10 rows of data, including tags like Alumni, Athletic Recruiting, College of Arts and Science, College of Business Administration, College of Education, Current Students, Football, Friends, Law School, and Undergraduate Recruiting. The status 'Displaying 10 rows.' is shown at the bottom right of the table.

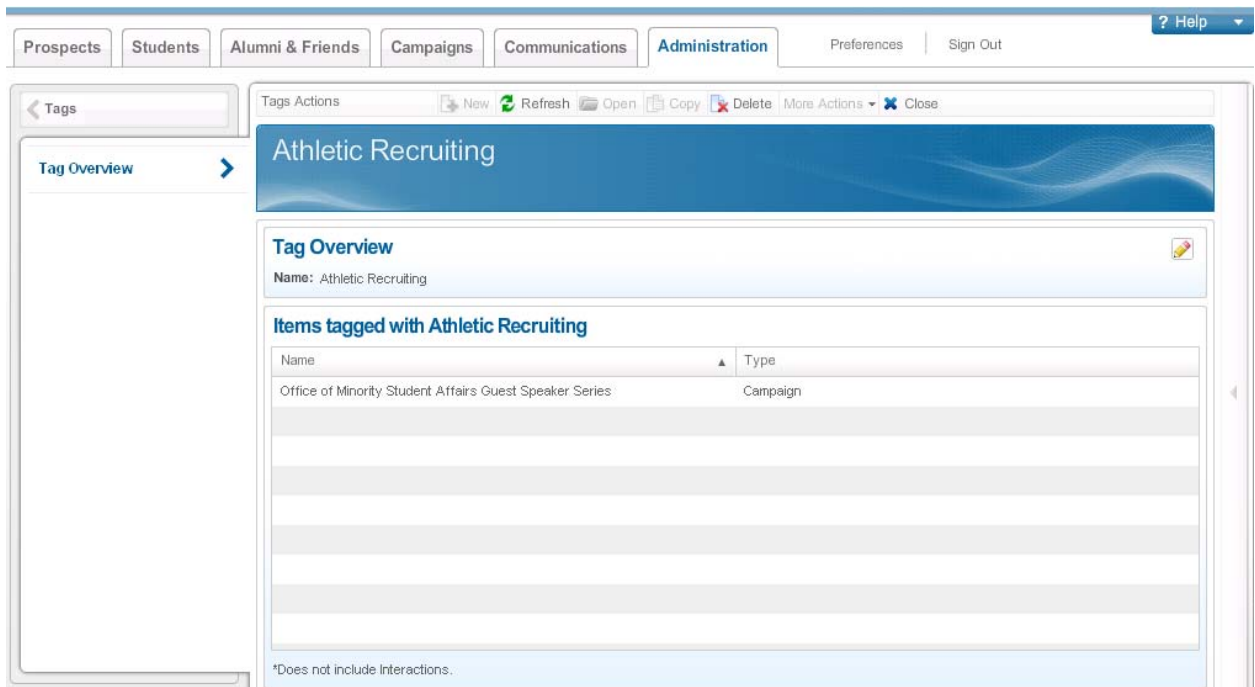
Name	Added By	Added Date	Count of Associate
Alumni	admin	Aug 03, 2010 1:5	0
Athletic Recruiting	admin	Aug 02, 2010 8:5	1
College of Arts and Science	admin	Aug 03, 2010 1:5	2
College of Business Administration	admin	Aug 03, 2010 1:5	0
College of Education	admin	Aug 03, 2010 1:5	0
Current Students	admin	Aug 03, 2010 1:5	0
Football	admin	Aug 03, 2010 1:5	0
Friends	admin	Aug 03, 2010 1:5	0
Law School	admin	Aug 03, 2010 1:5	0
Undergraduate Recruiting	admin	Aug 02, 2010 8:5	2




## Steps

1. Access the Tags menu on the Administration tab.
2. View the available tags. You may sort this list by name, creator, date of creation or count of associations by clicking the column headers.
3. Double-click a tag to open it, or click it once to select it and click **Open** on the Tags Actions toolbar.

All items that have been tagged with the selected tag are displayed.



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

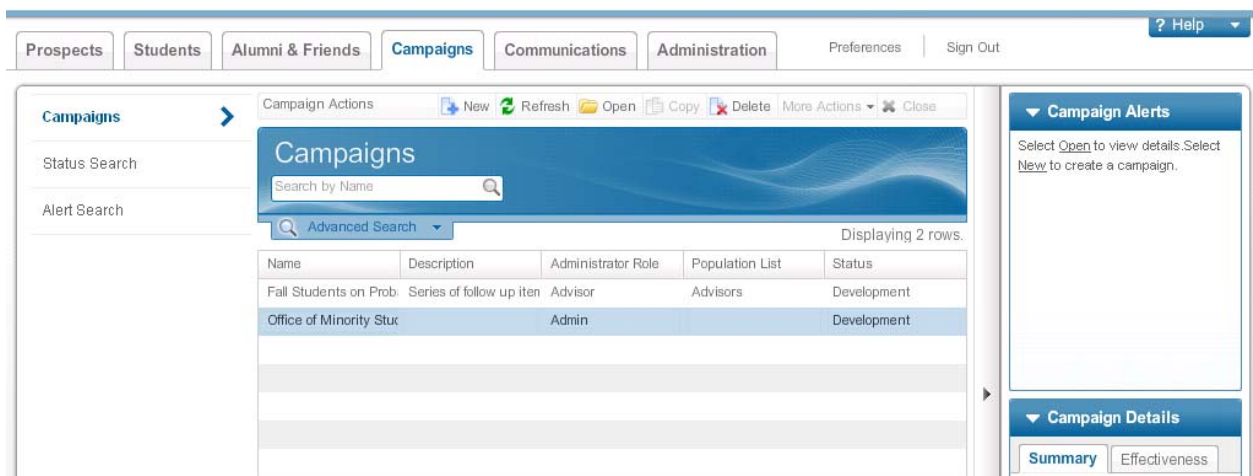
# Search for Tagged Items

## Introduction

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

## Steps

1. Access a menu that contains searchable items that can be tagged. For this example, click the **Campaigns** tab.



2. Click **Advanced Search** to call up the advanced search functionality.

3. Select **Tags** from the criteria list.

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

	Name	Added Date	Added By	Tag Count
<input type="checkbox"/>	Undergradu...	Aug 02, 2010	admin	2
<input type="checkbox"/>	College of B...	Aug 03, 2010	admin	0
<input type="checkbox"/>	Friends	Aug 03, 2010	admin	0
<input type="checkbox"/>	College of E...	Aug 03, 2010	admin	0
<input type="checkbox"/>	Current Stu...	Aug 03, 2010	admin	0
<input type="checkbox"/>	Football	Aug 03, 2010	admin	0
<input type="checkbox"/>	Law School	Aug 03, 2010	admin	0
<input type="checkbox"/>	Athletic Rec...	Aug 02, 2010	admin	1
<input type="checkbox"/>	Alumni	Aug 03, 2010	admin	0
<input type="checkbox"/>	College of Ar...	Aug 03, 2010	admin	2

5. Double-click on Available Tags entries to move them to the Selected Tags block, and vice versa.
6. When the tags that you wish to search for are selected, click the **Select** button.

7. Add additional criteria to your search as desired, then click **Go**.

The items that contain your criteria will be displayed.

## Campaigns

**Search Descriptions:** Tags = Athletic Recruiting ✕

🔍 Advanced Search ▼

Displaying 1 row.

Name	Description	Administrator Role	Population List	Status
Office of Minority Stud		Admin		Development