

Banner Enrollment Management Suite Relationship Management User and Role Administration Training Workbook

*Release 1.4 - August 2010
Updated 08/13/2010*



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Revision History Log

Publication Date	Summary
05/30/2008	New version to support Recruiting and Admissions Relationship version 1.0 software.
09/19/2008	Revision to support Relationship Management version 1.1 software.
10/09/2009	Revised to support Relationship Management 1.3 (new name and features).
08/13/2010	Revised to support Relationship Management 1.4 (updated screenshots).

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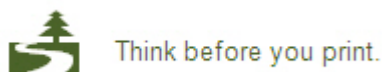


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User Administration



Introduction

The Users functions allow administrators to create, edit, delete and search for users in Relationship Management.

Intended audience

Those administrators responsible for maintaining user accounts at an institution.

Creating New Users

Introduction

New user accounts are created using the functions available on the Administration tab in Relationship Management

An Example Scenario:

The Admissions Office has hired several new staff members:

- An associate director of admissions, who will need full access to Relationship Management;
- An admissions counselor, who will need limited access to the Relationship Management;
- A temporary receptionist, who will need limited access to Relationship Management for a limited period of time.
- A communications specialist, who will create letters, email messages, and targeted announcements for use with recruiting efforts.
- An intern, who will have limited responsibilities related to recruiting and admissions activities.

An administrator with system permissions to create new accounts may be tasked with creating these new users in the system.

Users view

From the Administration tab, click **Users** on the left-hand bar to view the Users screen. From this screen, you can create, edit and manage user accounts.

The screenshot shows the 'Users' view in the SunGard Banner Relationship Management system. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A 'Help' button is in the top right. The left sidebar lists various system components, with 'Users' selected. The main content area features a 'User Actions' toolbar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. Below this is a search bar with 'Search by Last Name' and an 'Advanced Search' dropdown. A table displays a list of users, with 20 rows shown. The table columns are User Name, First Name, Last Name, Effective From, Effective To, and E-mail. The footer contains copyright information for SunGard (2008-2010) and the product name 'SUNGARD HIGHER EDUCATION'.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
recruiter	Recruiter	Recruiter	Jan 01, 2007 10:01 AM		recruiter@sampleschoo
funnelsuser	FunnelsUser	FunnelsUser	Jan 01, 2007 10:01 AM		FunnelsUser@samples
advisor	Advisor	Advisor	Jan 01, 2010 10:01 AM		Advisor@sampleschool.
studentprofileuser	StudentProfileUser	StudentProfileUser	Jan 01, 2010 10:01 AM		StudentProfileUser@sa
alumniprofileuser	AlumniProfileUser	AlumniProfileUser	Jan 01, 2010 10:01 AM		AlumniProfileUser@sar
admin	Administrator	Administrator	Jan 01, 2007 10:01 AM		admin@sampleschool.e
readonlyuser	ReadOnlyUser	ReadOnlyUser	Jan 01, 2007 10:01 AM		ReadOnlyUser@sample
campaignuser	CampaignUser	CampaignUser	Jan 01, 2007 10:01 AM		CampaignUser@sample
communicationsuser	CommunicationsUser	CommunicationsUser	Jan 01, 2007 10:01 AM		CommunicationsUser@
populationsuser	PopulationsUser	PopulationsUser	Jan 01, 2007 10:01 AM		PopulationsUser@samp
prospectprofileuser	ProspectProfileUser	ProspectProfileUser	Jan 01, 2007 10:01 AM		ProspectProfileUser@si
prospectprofilereader	ProspectProfileReader	ProspectProfileReader	Jan 01, 2007 10:01 AM		ProspectProfileReader@
rulesuser	RulesUser	RulesUser	Jan 01, 2007 10:01 AM		RulesUser@samplesch
useradmin	UserAdmin	UserAdmin	Jan 01, 2007 10:01 AM		UserAdmin@samplesch
studentprofilereader	StudentProfileReader	StudentProfileReader	Jan 01, 2010 10:01 AM		StudentProfileReader@

Steps

Steps to create a new user:

1. Click **Users** on the Administration Tab to access the Users screen.
2. In the User Actions toolbar, click **New**. The Create New User screen will appear.

A screenshot of a 'Create New User' dialog box. The dialog has a blue header bar with the title 'Create New User' and two small icons on the right. Below the header is a white form area with several input fields. The fields are: 'User Name: *' (required), 'Last Name: *' (required), 'First Name:' (optional), 'Middle Name:' (optional), 'Oracle User Name:' (optional), 'Effective From:' (date picker), 'To:' (date picker), 'E-mail: *' (required), 'Enabled:' (dropdown menu with 'Yes' selected), 'New Password: *' (required), and 'Confirm Password: *' (required). At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

3. Enter a login name for the user in the **Login** field.
4. Enter a last name for the user in the **Last Name** field.
5. Enter a first name for the user in the **First Name** field.

6. Enter an Oracle user name in the **Oracle User Name** field. This is not a required field and the Oracle user name will need to be provided by your institution's DBA who is responsible for setting up Oracle user names.

The Oracle user name does not have to be the same as the user name entered in the **Login** field. However, this mapping will assure that updates to the Banner database permitted in Relationship Management (such as contact information – addresses, email, and other recruit related data) will store the Oracle user name that is responsible for the update.

7. Enter an email address for the user in the **E-mail** field.
8. Enter a starting password for the user in the **New Password** field, then repeat it in the **Confirm Password** field.
9. Enter additional field information as necessary. Fields marked with a red asterisk are required fields.
10. Click **Save** to save the new user.

Search for a Specific User

Introduction

You may use either a standard or advanced search function to search for a desired user.

Users view

The screenshot displays the 'Users' view within the SunGard Banner Relationship Management application. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A 'User Actions' toolbar at the top of the main content area contains buttons for New, Refresh, Open, Copy, Delete, and More Actions. A search bar labeled 'Search by Last Name' is positioned above the user list. A left-hand sidebar lists various system components: Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags, Categories, Organizations, and Communication Configuration. The main area displays a table of users with columns for User Name, First Name, Last Name, Effective From, Effective To, and E-mail. The table shows 20 rows of data, including users like recruiter, funnelsuser, advisor, studentprofileuser, alumniprofileuser, admin, readonlyuser, campaignuser, communicationsuser, populationsuser, prospectprofileuser, prospectprofilereader, rulesuser, useradmin, and studentprofilereader. The footer of the application window shows the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
recruiter	Recruiter	Recruiter	Jan 01, 2007 10:01 AM		recruiter@sampleschoo
funnelsuser	FunnelsUser	FunnelsUser	Jan 01, 2007 10:01 AM		FunnelsUser@samples
advisor	Advisor	Advisor	Jan 01, 2010 10:01 AM		Advisor@sampleschool.
studentprofileuser	StudentProfileUser	StudentProfileUser	Jan 01, 2010 10:01 AM		StudentProfileUser@sa
alumniprofileuser	AlumniProfileUser	AlumniProfileUser	Jan 01, 2010 10:01 AM		AlumniProfileUser@sar
admin	Administrator	Administrator	Jan 01, 2007 10:01 AM		admin@sampleschool.e
readonlyuser	ReadOnlyUser	ReadOnlyUser	Jan 01, 2007 10:01 AM		ReadOnlyUser@sample
campaignuser	CampaignUser	CampaignUser	Jan 01, 2007 10:01 AM		CampaignUser@sampl
communicationsuser	CommunicationsUser	CommunicationsUser	Jan 01, 2007 10:01 AM		CommunicationsUser@
populationsuser	PopulationsUser	PopulationsUser	Jan 01, 2007 10:01 AM		PopulationsUser@sam
prospectprofileuser	ProspectProfileUser	ProspectProfileUser	Jan 01, 2007 10:01 AM		ProspectProfileUser@si
prospectprofilereader	ProspectProfileReader	ProspectProfileReader	Jan 01, 2007 10:01 AM		ProspectProfileReader@
rulesuser	RulesUser	RulesUser	Jan 01, 2007 10:01 AM		RulesUser@samplesch
useradmin	UserAdmin	UserAdmin	Jan 01, 2007 10:01 AM		UserAdmin@samplesch
studentprofilereader	StudentProfileReader	StudentProfileReader	Jan 01, 2010 10:01 AM		StudentProfileReader@

Steps

Steps to search for a specific user:

1. From the Users screen, enter a desired last name in the **Search By Last Name** field.

To promote effective system performance, use full last names in all searches to minimize time waiting for search results. If you are unsure of the entire last name, you can use % or * as a wildcard in searches. For example, if you are unsure as to whether the user's last name is Haskin or Haskins, searching for Haskin* or Haskin% would return users with both last names.

2. Click **Go** to execute your search.

Users

Search by Last Name

Search Descriptions: Last Name = D*

Advanced Search

Displaying 2 rows.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
sdiaz	Shawn	Diaz	Aug 22, 2010 12:00 AM	Dec 31, 2010 11:59 PM	sdiaz@sungardhe.com
developmentofficer	DevelopmentOfficer	DevelopmentOfficer	Jan 01, 2010 10:01 AM		developmentofficer@sarr

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3. The Users screen should list only users that match your last name criteria.

4. Use the **Advanced Search** function to select attributes with which to search for desired users. You can select one or more attributes and enter values for these attributes via the drop-down boxes.

The screenshot displays the SunGard Banner Relationship Management User Administration interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). A 'Help' button is located in the top right corner. Below the navigation bar, the 'Users' section is active, showing a list of user actions (New, Refresh, Open, Copy, Delete, More Actions, Close) and a search bar labeled 'Search by Last Name'. A dropdown menu titled 'Select Attribute' is open, showing options: E-mail Address, Effective From, Effective To, Enabled, and First Name. Below the dropdown, there is an 'Advanced Search' button and a 'Go' button. The main area displays a table of users with columns: User Name, First Name, Last Name, Effective From, Effective To, and E-mail. The table shows 20 rows of data, including users like recruiter, funnelsuser, advisor, studentprofileuser, alumniprofileuser, admin, and readonlyuser. The footer of the interface includes copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the SunGard Higher Education logo.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
recruiter	Recruiter	Recruiter	Jan 01, 2007 10:01 AM		recruiter@sampleschoo
funnelsuser	FunnelsUser	FunnelsUser	Jan 01, 2007 10:01 AM		FunnelsUser@samples
advisor	Advisor	Advisor	Jan 01, 2010 10:01 AM		Advisor@sampleschoo.
studentprofileuser	StudentProfileUser	StudentProfileUser	Jan 01, 2010 10:01 AM		StudentProfileUser@sa
alumniprofileuser	AlumniProfileUser	AlumniProfileUser	Jan 01, 2010 10:01 AM		AlumniProfileUser@sar
admin	Administrator	Administrator	Jan 01, 2007 10:01 AM		admin@sampleschoo.e
readonlyuser	ReadOnlyUser	ReadOnlyUser	Jan 01, 2007 10:01 AM		ReadOnlyUser@sample

5. Select and enter desired attributes and click **Go** to search for users matching them.

Notes on search methods

It is best to clear a previously-performed "normal" search before performing an Advanced Search. The Delete (X) icon will clear a search criteria.

Clearing searches after usage is recommended in order to keep search criteria from running together.

Assign Basic Roles to Users

Overview

When a user has been created, the account exists but the user would not be able to do anything in Relationship Management yet. This is because the created accounts do not yet have any assigned roles or permissions in the system.

Permissions are associated with roles in Relationship Management. Each user must be associated with a role in order to log in and gain access to the functions they require to perform their jobs.

The permissions of a role will dictate what functionality the user sees when he/she logs in. Roles and assignment of roles will be discussed in more detail in a later section, but for now some basic roles should be assigned to the users that have been created..

Role Assignments view


The screenshot displays the Banner Relationship Management User Administration interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help icon. The main content area is titled 'Users' and contains a sidebar with 'User Overview', 'Role Assignments' (which is highlighted with a blue arrow), and 'User Preferences'. The main panel shows the 'User Actions' bar with buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this is a header for 'Shawn Diaz'. A table lists the user's roles:

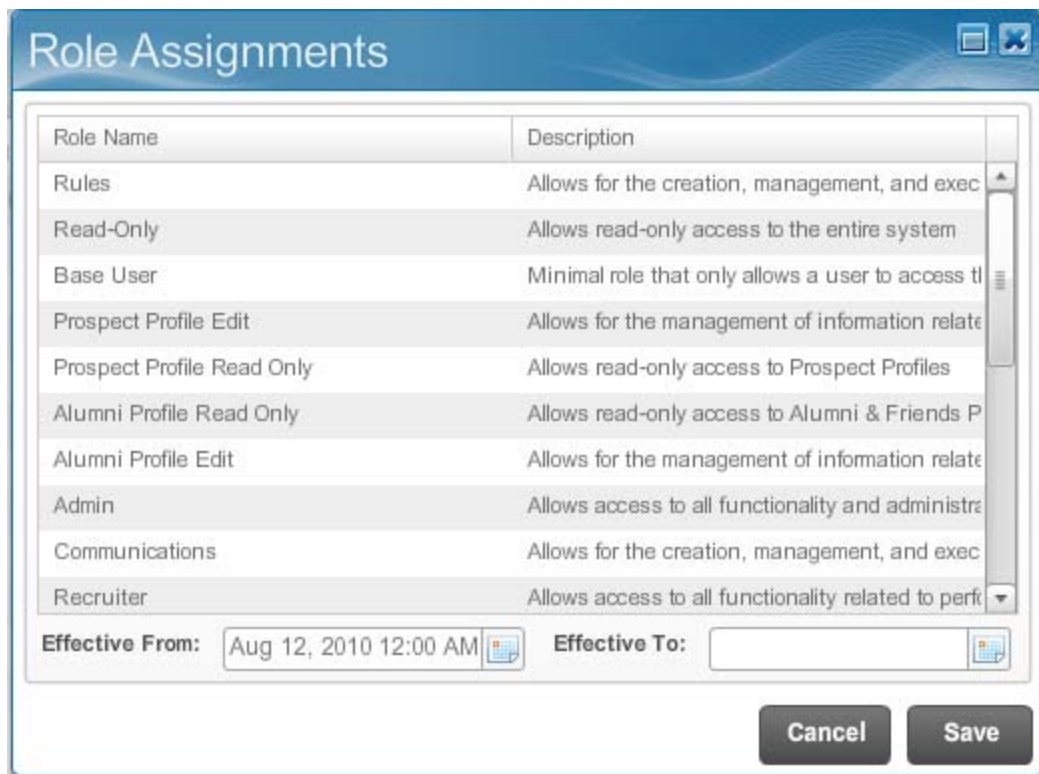
Role Name	Effective From	Effective To
Recruiter	Aug 12, 2010 12:00 AM	

At the bottom right of the table area are two buttons: 'Delete Selected' and 'Add Role Assignment'. The footer of the application shows the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

Steps

Steps to assign a role to a user via the Roles view:

1. From the Users view, double-click a desired user to open it.
2. On the left-hand side, click **Role Assignments** to view roles associated with the user.
3. Click **Add Role Assignment** () to select a role to assign to this user.



The image shows a 'Role Assignments' dialog box with a table of roles and their descriptions. At the bottom, there are fields for 'Effective From' and 'Effective To' dates, and 'Cancel' and 'Save' buttons.

Role Name	Description
Rules	Allows for the creation, management, and execution of rules
Read-Only	Allows read-only access to the entire system
Base User	Minimal role that only allows a user to access the system
Prospect Profile Edit	Allows for the management of information related to prospect profiles
Prospect Profile Read Only	Allows read-only access to Prospect Profiles
Alumni Profile Read Only	Allows read-only access to Alumni & Friends Profiles
Alumni Profile Edit	Allows for the management of information related to alumni profiles
Admin	Allows access to all functionality and administrative tasks
Communications	Allows for the creation, management, and execution of communications
Recruiter	Allows access to all functionality related to performance management

Effective From: Effective To:

4. Select a role from the list to be assigned to this user.
5. If desired, use the **Effective From** and **Effective To** fields to select effective dates for this user-role combination.
6. Click **Save** to apply the changes.

Edit User Accounts

Steps


Steps to edit an existing user in the system:

1. If you are not already there, click **Users** on the Administration Tab to access the Users screen.
2. Search for the user you need to edit.
3. Double-click on the user name in the User list to access the user's information.

The screenshot displays the SunGard Banner Relationship Management User Administration interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is titled 'Users'. On the left side of this area, there is a sidebar with links for 'User Overview' (which is active and highlighted with a blue arrow), 'Role Assignments', and 'User Preferences'. The main content area shows the 'User Overview' for a user named Allison Brown. The user's name is displayed in a large blue header. Below this, the 'User Overview' section contains a table of user information:

User Name:	abrown	Last Name:	Brown
First Name:	Allison	Middle Name:	E
Effective From:		Effective To:	
Enabled:	Yes	E-mail:	abrown@sungardhe.com
Oracle User Name:	abrown		

At the bottom right of the user overview section, there is a 'Set Password' button. The footer of the page contains copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the SunGard Higher Education logo.

4. Click the **Edit** icon () to access the Edit User screen for the selected user.



Edit User

User Name: * abrown

Last Name: * Brown

First Name: Allison

Middle Name: E

Oracle User Name: abrown

Effective From: 

To: 

E-mail: * abrown@sungardhe.com

Enabled: Yes ▼

Cancel Save

5. Modify the fields as desired. For instance, in the example above, the administrator is about to edit Allison Brown's E-mail address.
6. Click **Save** to save changes to this user's information.

Set a User's Password

Introduction

An administrator may set or reset a user's password from the Users screen.

Note: Not all institutions will want to manage passwords through Recruiting and Admissions Relationships itself. These institutions may choose to authenticate users against an external source as part of their identity and access management strategies, in which case the steps below would not apply.

User Overview view

The screenshot shows the Banner Relationship Management interface. At the top, there is a navigation bar with tabs for 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 icon. Below the navigation bar, the main content area is titled 'Allison Brown'. On the left side of this area, there is a sidebar with a 'Users' section containing 'User Overview' (selected), 'Role Assignments', and 'User Preferences'. The 'User Overview' section displays the following information:

User Overview	
User Name:	abrown
First Name:	Allison
Effective From:	
Enabled:	Yes
Oracle User Name:	abrown
Last Name:	Brown
Middle Name:	E
Effective To:	
E-mail:	abrown@sungardhe.com

At the bottom right of the main content area, there is a 'Set Password' button. The footer of the page contains the copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

Steps

Steps to set a user's password:

1. From the Administration tab, click **Users** to access the Users screen.
2. Double-click a user from the list to view the user's information.
3. While viewing the desired user's information, click **Set Password**. The Set Password screen will appear.

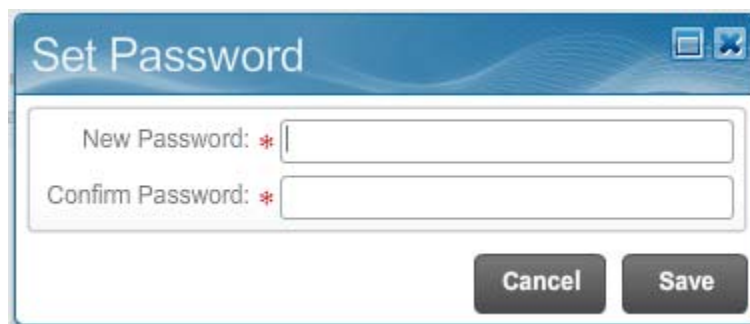
A screenshot of a 'Set Password' dialog box. It has a blue header with the title 'Set Password'. Below the header are two text input fields. The first field is labeled 'New Password: *' and the second is labeled 'Confirm Password: *'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

4. Enter the new password for the user in the **New Password** field and repeat it in the **Confirm Password** field.
5. Click **Save** to save the changes.

Note: If a user wishes to change their own password, they can do this from any screen in Relationship Management by selecting **Preferences**:



On the resulting screen, they can reset their own password:

A screenshot of a 'Set Password' dialog box, identical to the one shown in the previous image. It has a blue header with the title 'Set Password'. Below the header are two text input fields. The first field is labeled 'New Password: *' and the second is labeled 'Confirm Password: *'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

Enable or Disable a User Account

Introduction

User accounts are enabled and disabled on the Enabled field of the Edit User screen.

Edit User view



Edit User

User Name: * abrown

Last Name: * Brown

First Name: Allison

Middle Name: E

Oracle User Name: abrown

Effective From: 

To: 


E-mail: * abrown@sungardhe.com

Enabled: Yes ▼

Cancel Save

Steps

Steps to disable a user's account:

1. If you are not already there, click **Users** on the Administration Tab to access the Users screen.
2. Double-click an existing user to call up that user's information.
3. Click the **Edit** icon () to access the Edit User screen for the selected user.
4. Modify the **Enabled** field as desired. A value of **Yes** means that the account is enabled, while **No** means that the account is disabled.



5. Click **Save** to save changes to this user's information.
6. Return to the Users screen to verify that the changed account is in the desired state.

Role Administration



Introduction

In this section, you will be creating, managing and updating user roles in Relationship Management and assigning them to users. Roles allow administrators to grant or deny access to Relationship Management components to users or groups of users based on their specific job functions at an institution.

Role Administration

An administrator will be responsible for assigning roles to existing user accounts in Relationship Management for the employees who will be performing various tasks in the system, so that the employees will have the access they need but will not be able to make changes or view data that they shouldn't. Using roles to do this will allow multiple employees with similar job functions to be assigned similar permissions at once.

Roles view

The screenshot displays the 'Roles' view within the Banner Relationship Management system. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A 'Help' button is located in the top right corner. Below the navigation bar, a sidebar on the left lists various system components: Users, Roles (selected), Business Rules, Expressions, Funnels, Ratings, Tags, Categories, Organizations, and Communication Configuration. The main content area is titled 'Roles' 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 lists the roles, with columns for 'Name' and 'Description'. The roles are: Rules, Read-Only, Base User, Prospect Profile Edit, Prospect Profile Read O, Alumni Profile Read On, Alumni Profile Edit, Admin, Communications, Recruiter (highlighted), Campaigns, User Admin, Advisor, Student Profile Read Or, and Student Profile Edit. The table indicates it is displaying 20 rows. At the bottom of the page, there is a footer with copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

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

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

Role Actions New Refresh Open Copy Delete More Actions Close

Roles

Search by Name

Advanced Search

Displaying 20 rows.

Name	Description
Rules	Allows for the creation, management, and execution of Business Rules
Read-Only	Allows read-only access to the entire system
Base User	Minimal role that only allows a user to access the system and set their password
Prospect Profile Edit	Allows for the management of information related to Prospect Profiles
Prospect Profile Read O	Allows read-only access to Prospect Profiles
Alumni Profile Read On	Allows read-only access to Alumni & Friends Profiles
Alumni Profile Edit	Allows for the management of information related to Alumni & Friends Profiles
Admin	Allows access to all functionality and administrative objects
Communications	Allows for the creation, management, and execution of Communications and related objects
Recruiter	Allows access to all functionality related to performing Recruiter/Admissions Counselor responsibilities
Campaigns	Allows for the creation, management, and execution of Campaigns
User Admin	Allows for the creation and management of Users, Roles, and related assignments
Advisor	Allows access to all functionality related to performing Advisor/Student Records responsibilities
Student Profile Read Or	Allows read-only access to Student Profiles
Student Profile Edit	Allows for the management of information related to Student Profiles

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Create a Role

Scenario

A role may be set up for the position of Communications Specialist, so that individuals responsible for developing communication objects can have appropriate access within Relationship Management, but may not have access to other functions that they do not need to use.

Steps

Steps to create a new role:

1. From the Administration Tab, click **Roles** to access the Roles screen. This screen should list existing roles.
2. On the Roles toolbar, click **New**.



3. Enter a name for the role in the **Name** field, which is required.
4. Enter a description of the role in the **Description** field, if desired.
5. Click **Save** to save the changes.

Exercise

1. Following the steps above, create a Role for a Communications Specialist
2. Save the role for later use.

Assigning Permissions to a Role

Scenario

Your institution recognizes that its Communication Specialists need access to certain functions of the Relationship Management solution to complete their responsibilities. Consequently, an administrator will need to revise the system permissions that will be associated with these new roles.

Permissions view



Steps

Complete the following steps to assign permissions to a role.

1. From the Roles view, select and double-click to open a role.

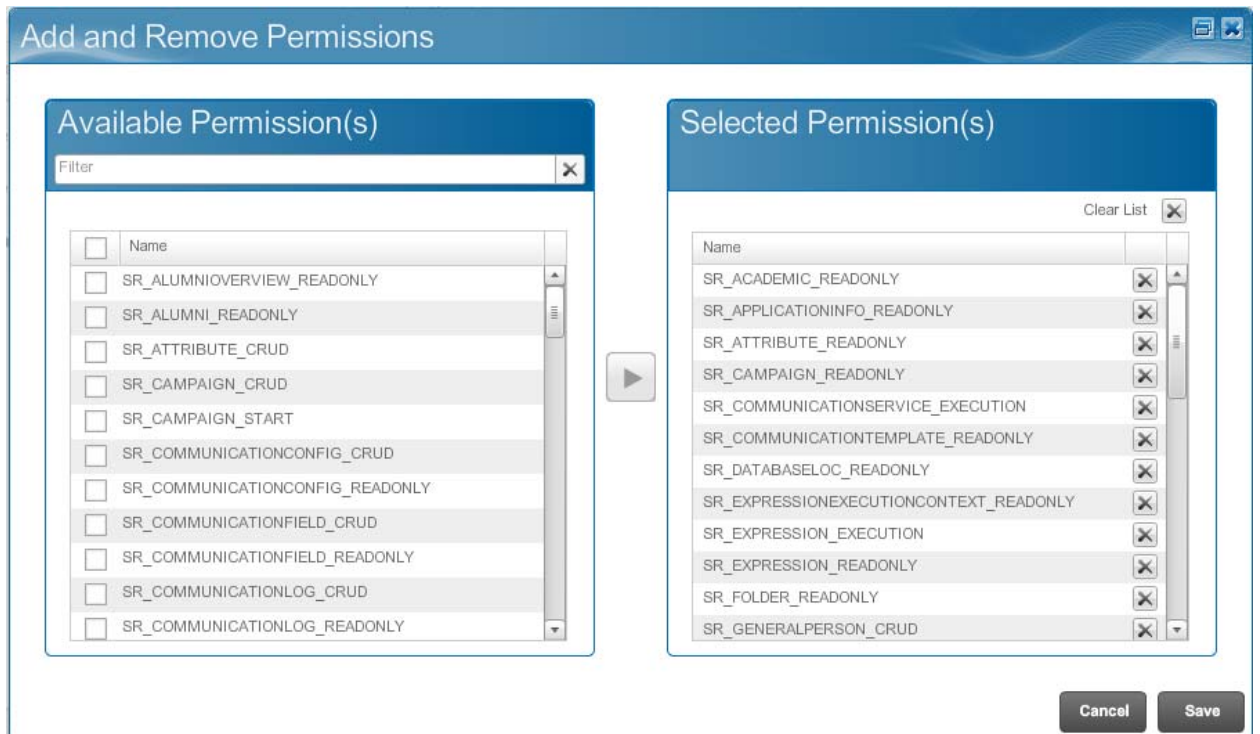
The screenshot displays the SunGard Banner Relationship Management (Version 1.4 Build: 349) Administration interface. The 'Roles' view is active, showing a list of roles with their descriptions. The 'Recruiter' role is highlighted. The interface includes a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The 'Roles' view includes a search bar, an 'Advanced Search' button, and a table of roles.



Name	Description
Rules	Allows for the creation, management, and execution of Business Rules
Read-Only	Allows read-only access to the entire system
Base User	Minimal role that only allows a user to access the system and set their password
Prospect Profile Edit	Allows for the management of information related to Prospect Profiles
Prospect Profile Read O	Allows read-only access to Prospect Profiles
Alumni Profile Read On	Allows read-only access to Alumni & Friends Profiles
Alumni Profile Edit	Allows for the management of information related to Alumni & Friends Profiles
Admin	Allows access to all functionality and administrative objects
Communications	Allows for the creation, management, and execution of Communications and related objects
Recruiter	Allows access to all functionality related to performing Recruiter/Admissions Counselor responsibilities
Campaigns	Allows for the creation, management, and execution of Campaigns
User Admin	Allows for the creation and management of Users, Roles, and related assignments
Advisor	Allows access to all functionality related to performing Advisor/Student Records responsibilities
Student Profile Read Or	Allows read-only access to Student Profiles
Student Profile Edit	Allows for the management of information related to Student Profiles

- On the left-hand side, click **Permissions** to view permissions currently assigned to the role.



- Click the **Edit** icon () to open the Add and Remove Permissions window.



4. Select the permissions you want to add, then click the arrow icon to move the selected item(s) to the Selected Permissions area.
5. If desired, select an existing permission and click the delete icon () to remove it.
6. Click  to add the selected Permission to the role.

Exercise

1. Find your Communication Specialist role.
2. Following the steps outlined above, open the Communications Specialist role and add the following Permissions to the role:

Permission
SR_GENERALPERSON_READONLY
SR_FOLDER_READONLY
SR_COMMUNICATIONTEMPLATE_CRUD
SR_COMMUNICATIONLOG_READONLY
SR_USER_SELF
SR_COMMUNICATIONSERVICE_EXECUTION
SR_FOLDER_CRUD

3. Create a new Intern role.
4. Open the Intern role. Select the Permissions link from the left Navigation Pane to edit the permissions associated with this role.
5. Find the following permissions in the list and add them to the Intern role:

Permission
SR_GENERALPERSON_READONLY
SR_ATTRIBUTE_READONLY
SR_INTERACTION_READONLY
SR_EDUCATIONBACKGROUND_READONLY
SR_INTEREST_READONLY
SR_PROSPECTOVERVIEW_READONLY
SR_USER_SELF

The permission sets in the examples above do not necessarily reflect recommended permissions for such roles but instead are samples to illustrate the connection between users, roles, and permissions. Each institution should evaluate the responsibilities and determine the specific permissions that it would assign to the roles it creates.

Assigning Roles to Users



Assigning Roles to Users

Introduction

The purpose of creating roles is to associate them with users, so that users with similar tasks can be managed more easily via giving them similar roles. Users may have multiple roles, and roles may be assigned to multiple users.

Roles may be assigned to users via either the Role Assignment or the Users views.

Scenario

An administrator has created user accounts and roles in Relationship Management, and now wishes to assign the roles to the user accounts according to their job functions.

Role Assignment view

The screenshot displays the 'Role Assignment' view within the Banner Relationship Management application. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A 'Help' button is located in the top right corner. The main content area is titled 'Test' and features a table with columns for 'User Name', 'Effective From', and 'Effective To'. The table contains one row with the user 'abrown' and an effective date of 'Aug 10, 2010 12:00 AM'. Below the table, there are buttons for 'Delete Selected' and 'Add Role Assignment'. The footer of the application shows the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

User Name	Effective From	Effective To
abrown	Aug 10, 2010 12:00 AM	

Steps

Steps to assign a role to a user via the Roles view:

1. From the Roles view, double-click a desired role to open it.
2. On the left-hand side, click **Role Assignments** to view users associated with the role.
3. Click **Create New Role Assignment** to select a user to assign to this role.

User Name	First Name	Last Name
populationsuser	PopulationsUser	PopulationsUser
prospectprofileuser	ProspectProfileUser	ProspectProfileUser
prospectprofilereader	ProspectProfileReader	ProspectProfileReader
rulesuser	RulesUser	RulesUser
useradmin	UserAdmin	UserAdmin
studentprofilereader	StudentProfileReader	StudentProfileReader
sdiaz	Shawn	Diaz
abrown	Allison	Brown
expressionsuser	ExpressionsUser	ExpressionsUser
alumniprofilereader	AlumniProfileReader	AlumniProfileReader

Effective From: Aug 12, 2010 12:00 AM Effective To:

Cancel Save

4. Select a user from the list to which this role should be assigned.
5. If desired, use the **Effective From** and **Effective To** fields to select effective dates for this user-role combination.
6. Click **Save** to apply the changes

Users view

The previous steps assigned a role to a user via the Roles screen. Now a user will be assigned a role via the Users screen.

The screenshot shows the 'Users' view in the SunGard Banner Relationship Management system. The navigation menu on the left includes Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area displays a table of users with the following columns: User Name, First Name, Last Name, Effective From, Effective To, and E-mail. The user 'abrown' is highlighted in blue. The table also includes a search bar at the top and a 'User Actions' menu with options like New, Refresh, Open, Copy, Delete, and More Actions.

User Name	First Name	Last Name	Effective From	Effective To	E-mail
readonlyuser	ReadOnlyUser	ReadOnlyUser	Jan 01, 2007 10:01 AM		ReadOnlyUser@sample
campaignuser	CampaignUser	CampaignUser	Jan 01, 2007 10:01 AM		CampaignUser@sample
communicationsuser	CommunicationsUser	CommunicationsUser	Jan 01, 2007 10:01 AM		CommunicationsUser@sample
populationsuser	PopulationsUser	PopulationsUser	Jan 01, 2007 10:01 AM		PopulationsUser@sample
prospectprofileuser	ProspectProfileUser	ProspectProfileUser	Jan 01, 2007 10:01 AM		ProspectProfileUser@sample
prospectprofilereader	ProspectProfileReader	ProspectProfileReader	Jan 01, 2007 10:01 AM		ProspectProfileReader@sample
rulesuser	RulesUser	RulesUser	Jan 01, 2007 10:01 AM		RulesUser@samplesch
useradmin	UserAdmin	UserAdmin	Jan 01, 2007 10:01 AM		UserAdmin@samplesch
studentprofilereader	StudentProfileReader	StudentProfileReader	Jan 01, 2010 10:01 AM		StudentProfileReader@sample
sdiaz	Shawn	Diaz	Aug 22, 2010 12:00 AM	Dec 31, 2010 11:59 PM	sdiaz@sungardhe.com
abrown	Allison	Brown			abrown@sungardhe.com
expressionsuser	ExpressionsUser	ExpressionsUser	Jan 01, 2007 10:01 AM		ExpressionsUser@sample
alumniprofilereader	AlumniProfileReader	AlumniProfileReader	Jan 01, 2010 10:01 AM		AlumniProfileReader@sample
developmentofficer	DevelopmentOfficer	DevelopmentOfficer	Jan 01, 2010 10:01 AM		developmentofficer@sample

Steps

Steps to assigning a role to a user via the Users screen:

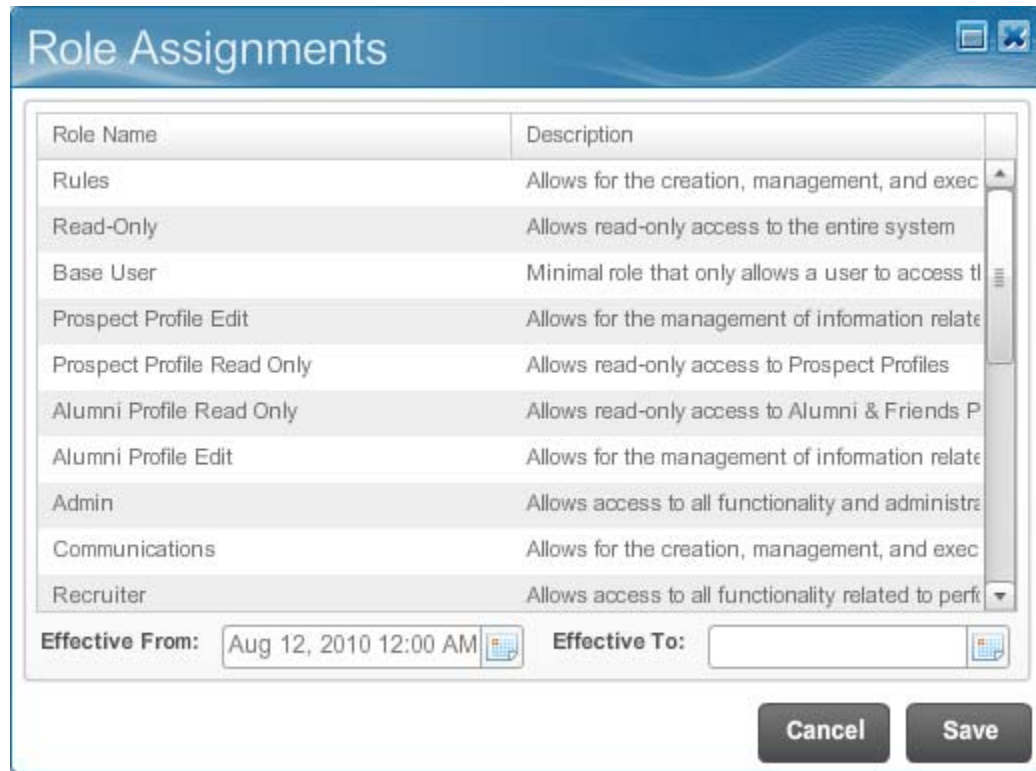
1. From the Administration Tab, select **Users**.
2. Double-click an existing user to view that user's information.
3. Click **Role Assignments** on the left-hand side to view roles associated with the selected user.

The screenshot displays the Banner Relationship Management interface. At the top, there are navigation tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is selected). To the right of these tabs are links for Preferences and Sign Out, and a Help button. Below the tabs, the main content area is titled 'Users'. On the left side of this area, there is a sidebar with options: User Overview, Role Assignments (which is selected and highlighted with a blue arrow), and User Preferences. The main content area shows the details for a user named Allison Brown. At the top of this section is a blue header with the user's name. Below this is a table with the following structure:

Role Name	Effective From	Effective To
Test	Aug 10, 2010 12:00 AM	

At the bottom of the table area, there are two buttons: 'Delete Selected' and 'Add Role Assignment'. The footer of the page contains the copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the SunGard Higher Education logo.

- Click **Add Role Assignment** to view available roles for this user.



The image shows a 'Role Assignments' dialog box with a blue header. It contains a table with two columns: 'Role Name' and 'Description'. The table lists several roles, including Rules, Read-Only, Base User, Prospect Profile Edit, Prospect Profile Read Only, Alumni Profile Read Only, Alumni Profile Edit, Admin, Communications, and Recruiter. Below the table are two date fields: 'Effective From' (set to 'Aug 12, 2010 12:00 AM') and 'Effective To' (empty). At the bottom right are 'Cancel' and 'Save' buttons.

Role Name	Description
Rules	Allows for the creation, management, and execution of rules
Read-Only	Allows read-only access to the entire system
Base User	Minimal role that only allows a user to access the system
Prospect Profile Edit	Allows for the management of information related to prospect profiles
Prospect Profile Read Only	Allows read-only access to Prospect Profiles
Alumni Profile Read Only	Allows read-only access to Alumni & Friends Profiles
Alumni Profile Edit	Allows for the management of information related to alumni profiles
Admin	Allows access to all functionality and administrative tasks
Communications	Allows for the creation, management, and execution of communications
Recruiter	Allows access to all functionality related to performance

Effective From: Aug 12, 2010 12:00 AM Effective To:

Cancel Save

- Select a role to be applied to the current user.
- If desired, enter effective dates for the role in the **Effective From** and **Effective To** fields.
- Click **Save** to apply the changes.

Delete a User

Introduction

Users may be deleted from their individual User Overview window.

User Overview view

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration (selected), Preferences, and Sign Out. A Help icon is in the top right. Below the navigation bar, a left sidebar shows a 'Users' section with a 'User Overview' link highlighted. The main content area is titled 'Robert Boyle' and contains a 'User Overview' form. The form displays the following user details:

User Name:	rboyle	Last Name:	Boyle
First Name:	Robert	Middle Name:	
Effective From:		Effective To:	
Enabled:	Yes	E-mail:	rboyle@sungardhe.com
Oracle User Name:	rboyle		

At the bottom right of the window is a 'Set Password' button. The top of the main content area includes a 'User Actions' bar with icons for New, Refresh, Open, Copy, Delete, More Actions, and Close.

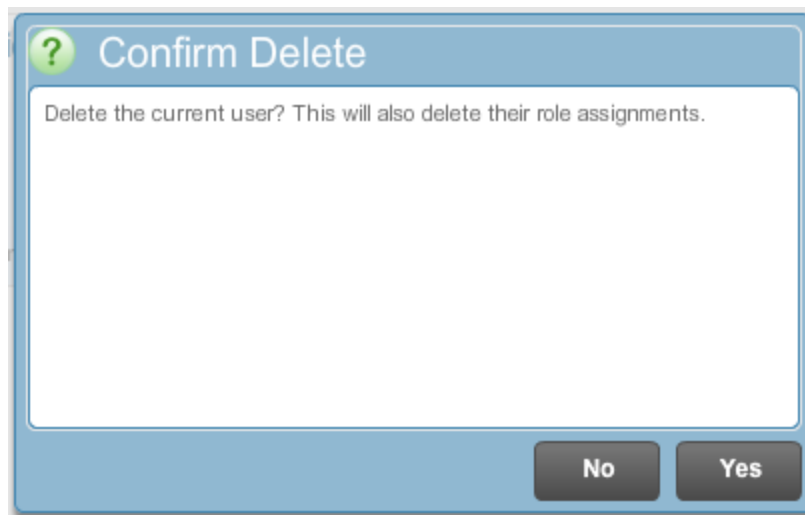
Steps

Steps to delete a user account:

1. If you are not already there, click **Users** on the Administration Tab to access the Users screen.
2. Double-click an existing user to call up that user's information.
3. On the Users toolbar, click **Delete**.



4. You will be prompted to confirm the deletion. Click **Yes** to confirm the deletion.



Delete a Role

Introduction

Administrators can delete roles from the system that are not currently associated with users. If a role is associated with one or more users, trying to delete it will fail, so as to not leave the user(s) without a role.

Roles view

Role Actions: New Refresh Open Copy Delete More Actions Close

Search by Name

Advanced Search

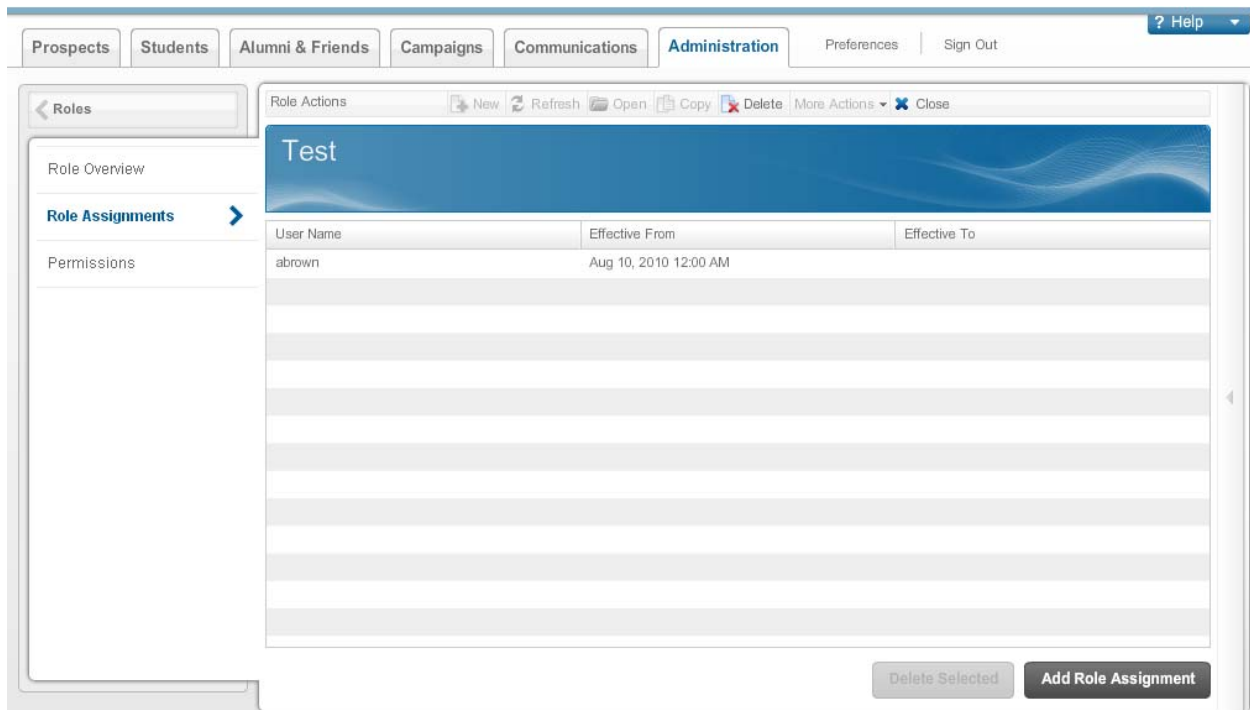
Displaying 20 rows.

Name	Description
Alumni Profile Edit	Allows for the management of information related to Alumni & Friends Profiles
Admin	Allows access to all functionality and administrative objects
Communications	Allows for the creation, management, and execution of Communications and related objects
Recruiter	Allows access to all functionality related to performing Recruiter/Admissions Counselor responsibilities
Campaigns	Allows for the creation, management, and execution of Campaigns
User Admin	Allows for the creation and management of Users, Roles, and related assignments
Advisor	Allows access to all functionality related to performing Advisor/Student Records responsibilities
Student Profile Read Or	Allows read-only access to Student Profiles
Student Profile Edit	Allows for the management of information related to Student Profiles
Development Officer	Allows access to all functionality related to performing Development Officer responsibilities
Test	For demonstration purposes only
Expressions	Allows for the creation, management, and execution of Expressions and related objects
Funnels	Allows for the creation, management, and execution of Funnels
Populations	Allows for the creation, management, and execution of Populations and related objects

Steps

Steps to delete a role from the system:

1. Double-click a role from the Roles view to open the Role Overview view.



2. On the Role toolbar, click **Delete**.
3. If the role is not associated with a user, the role will be deleted.

If the role is associated with a user, an error message should appear informing you of that fact.

Appendix - Delivered Users and Roles



Delivered Users and Roles

Delivered Users

The following users are delivered as part of the Relationship Management Seed Data:

- Admin
- Campaignuser
- Communicationsuser
- Expressionsuser
- Funnelsuser
- Populationsuser
- Profilereader
- Profileuser
- Readonlyuser
- Recruiter
- Rulesuser
- Useradmin

Delivered Roles

- Admin
- Recruiter
- Read-Only
- Campaigns
- Communications
- Expressions
- Funnels
- Populations
- Profile Edit
- Profile Read Only
- Rules
- Base User
- User Admin

For full details of the permissions that are associated with each of these Roles, please refer to the Relationship Management Administration Guide, Chapter 8.