

Banner Enrollment Management Suite Relationship Management Funnels Training Workbook

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| 10/02/2008 | Added Appendix. |
| 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). |
| 12/01/2010 | Revised to add Pending State information to the appendix. |

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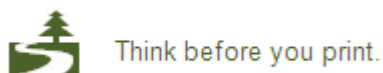


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Funnels



Introduction

In this section, you will be creating, managing and updating funnel models and funnel instances in Banner Enrollment Management, Relationship Management.

Objectives

By the end of this workbook, you should be able to

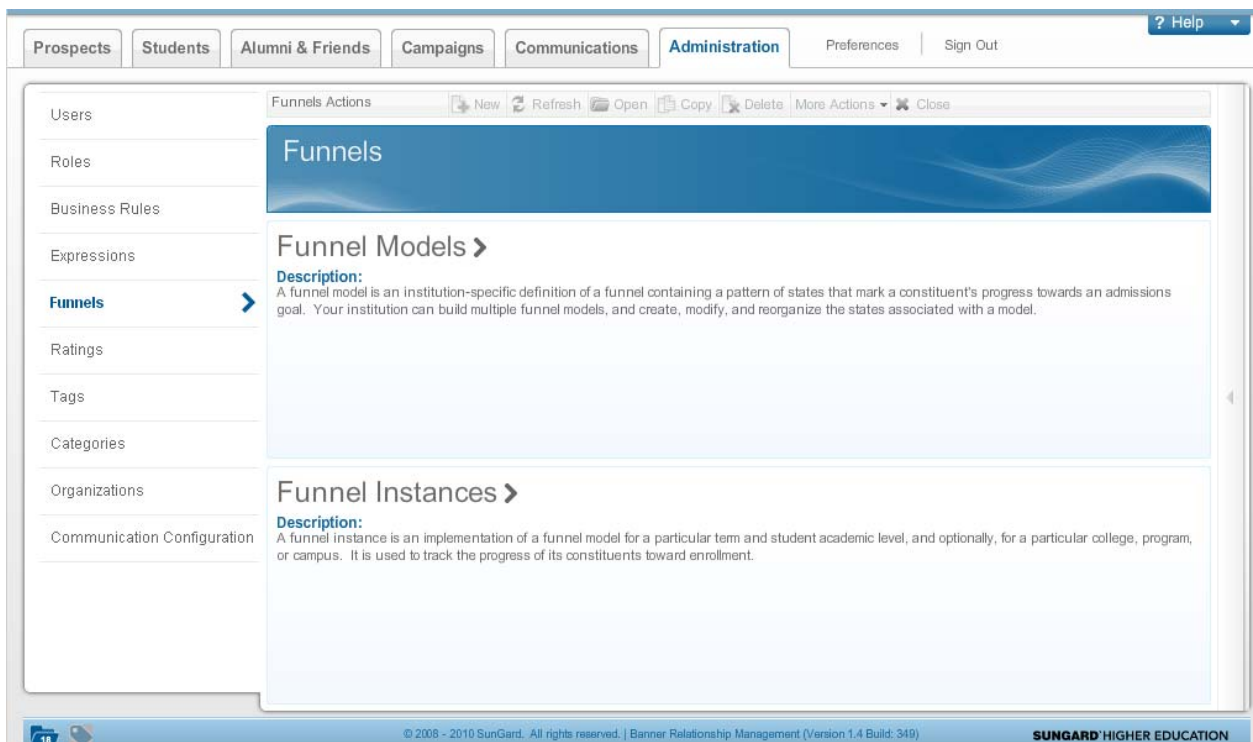
- Define funnel models and funnel instances
- Create funnel expressions
- Build a funnel model
- Copy a funnel model
- Build a funnel instance

Overview

A funnel is a construct in Relationship Management that defines stages of prospective students' progress towards enrollment. Populations that pass through a funnel are slowly narrowed down from stage to stage as prospects either pass through or are stopped by disqualifying and pending conditions.

The funnel functions in Relationship Management allow institutions to define a series of distinct stages for categorizing prospects' progress toward enrollment. At the simplest level, these stages may be prospect, recruit, applicant, admitted, and enrolled, but each institution can create the specific stages – and define the criteria for each – that it chooses.

To access Funnels in Relationship Management, from the Administration tab, click **Funnels** to view the Funnels menu.



Creating a Funnel Model

Introduction

The Funnels view has two components, funnel models and funnel instances. Because a funnel instance is simply an implementation of a funnel model, the funnel model needs to be created first.

Funnel Model view

The screenshot displays the SunGard Banner Relationship Management (Version 1.4 Build: 349) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Funnel Models' and features a search bar and a table with columns 'Name' and 'Description'. The table contains one entry: 'Admissions.Funnel' with the description 'Admissions Funnel'. The interface also includes a sidebar with 'Funnel Models' and 'Funnel Instances' sections, and a 'Model Summary' section. The footer shows the copyright information: © 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349) and the SunGard Higher Education logo.

Steps

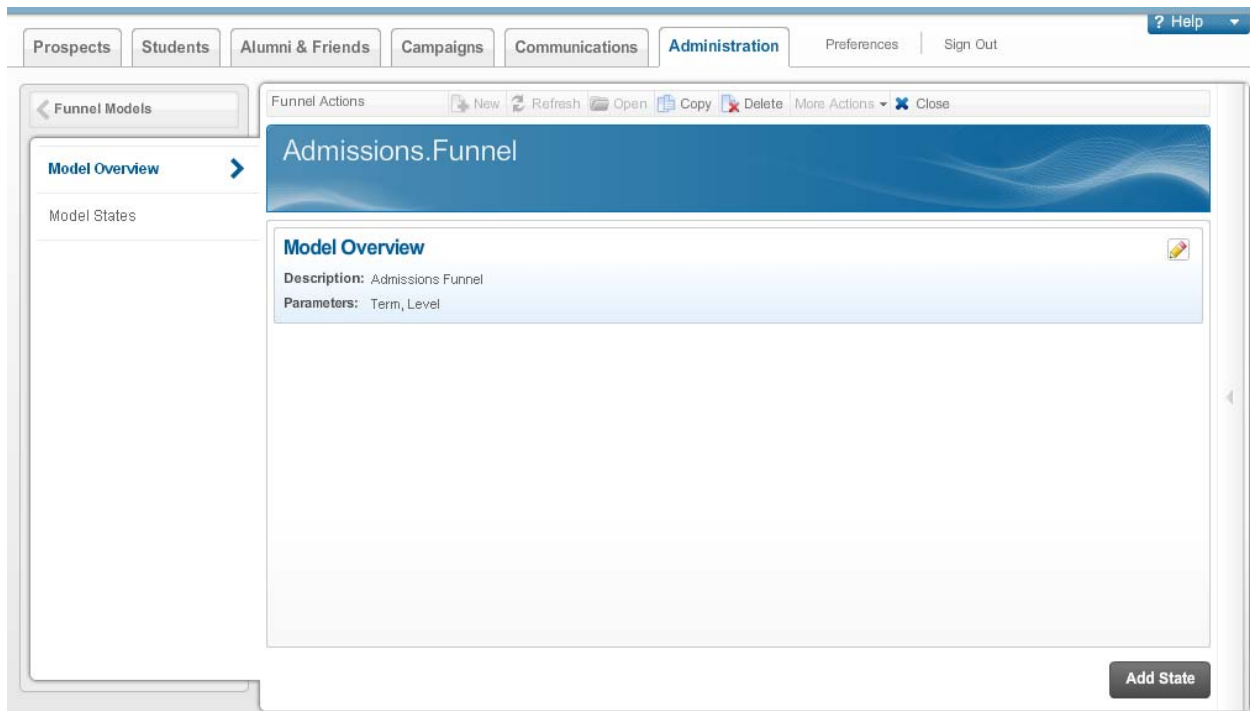
Steps to create a funnel model:

1. From the Funnel Models view, click **New** on the Funnel Model Actions bar.

A screenshot of a 'Create Funnel Model' dialog box. The dialog has a blue header bar with the title 'Create Funnel Model' and two small icons on the right. Below the header, there are three input fields: 'Name:' with a red asterisk, 'Description:', and 'Qualifier Type:' with a dropdown menu currently showing 'None'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

2. Enter a name for your funnel model in the **Name** field.
3. If desired, enter a description for your funnel model in the **Description** field.
4. If desired, select ONE of the following in the Qualifier Type field: Campus, College, or Program.
5. Click **Save** to save your new funnel model.

- Return to the Funnel Models view and select your funnel model to view the basic attributes you just created.



- If you need to do so, click the Edit (✎) icon to edit the basic attributes.

The 'Edit Funnel Model' dialog box is shown. It has a title bar with standard window controls. The form contains three fields: 'Name' with a red asterisk and the value 'Admissions.Funnel', 'Description' with the value 'Admissions Funnel', and 'Qualifier Type' with a dropdown menu set to 'None'. At the bottom right are 'Cancel' and 'Save' buttons.

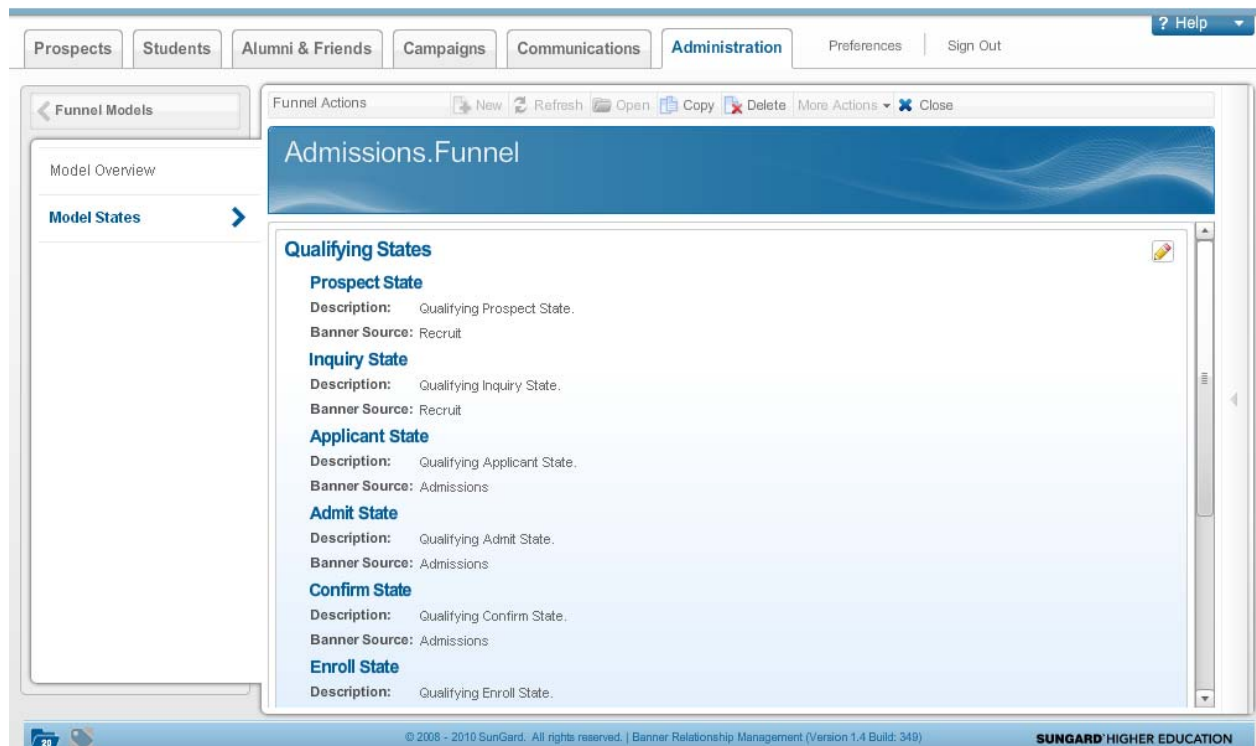
Adding States to a Funnel Model

Introduction

The utility of a funnel model in Relationship Management depends on Funnel States, each of which effectively aligns to one of the institution's funnel status classifications. You can add Qualifying, Pending and Disqualifying states to a funnel. Funnel States are defined by expressions, which determine how to categorize a given prospect. Put another way, a prospect's funnel status is determined by the expressions you create to define the funnel state.

The next step is to define the conditions that will make the funnel usable, by setting up states dictating what expressions must evaluate for a prospective student to pass through it.

Funnel Model States view



States

The three types of funnel states are qualifying, pending and disqualifying. It is important when designing funnel states to use expressions that will not lead to ambiguous states.

If a prospect matches expressions in more than one category (for example, meeting one Qualifying state expression but also meeting one Disqualifying state expression), he or she will be evaluated in the following order:

- A prospect who matches one or more disqualifying states is ejected from the funnel. (Disqualifying states are checked first when calculating a prospect's funnel status.) Examples of disqualifying states may include prospect withdrew application or was denied admission.
- A prospect who matches no disqualifying states but does match one or more pending states is placed in a pending status. Examples of pending status may include an applicant whose application is complete but pending a decision, or one who is waitlisted for admission.
- A prospect who matches no disqualifying or pending states but does match qualifying states will continue through the funnel. The prospect will be assigned to the highest funnel status for which s/he qualifies.
- A prospect who matches NO funnel states indicates that the funnel expressions need adjustment so that every prospect is assigned a funnel status.

Once a prospect's status is that of a Disqualifying type, he/she can never reenter the funnel. Thus, the population will decrease as the funnel progresses until only the desired prospects remain.

Example Qualifying states

- Prospect
- Inquiry
- Incomplete Application
- Application Complete
- Admitted
- Confirmed/Deposited
- Enrolled

Example Pending State

- Waitlisted
- Application complete, pending decision

Example Disqualifying States

- Denied
- Deferred
- Forfeits
- Deceased
- Withdrawn Application

UNDERSTAND YOUR UNDERLYING EXPRESSIONS and tweak them to fit your institution's data and policies. Examples are provided, but you will want to examine them in detail and edit them to better fit your institution's enrollment management business processes.

Funnel statuses

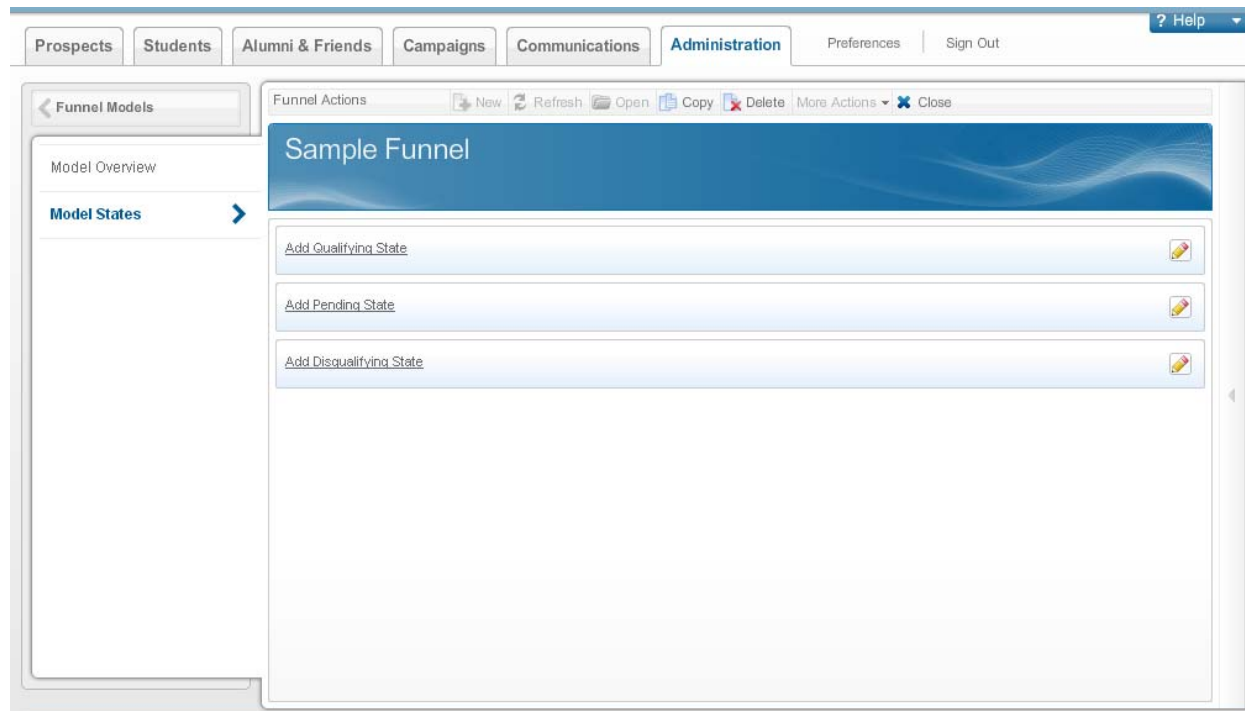
Default funnel statuses in Relationship Management are delivered as described in the following table. It may be necessary to edit the default funnel expressions to better match your institution's definition of the various stages. For example, most institutions would define an inquiry as someone who *initiated* an interaction with the institution, not someone who simply had an interaction.

| Funnel Sequence | Status | Status Type | Status Definition | Record type for supporting details |
|-----------------|--------------------|---------------|---|------------------------------------|
| 0 | Prospect | Qualifying | List of prospects (have a SRBRECR record). | RECRUIT |
| 1 | Inquiry | Qualifying | Prospects who have at least one interaction with the institution. | RECRUIT |
| 2 | Applicant | Qualifying | List of Applicants (have a SARADAP record). | ADMISSIONS |
| 3 | Admit | Qualifying | Applicants who have been accepted by the institution. | ADMISSIONS |
| 4 | Confirm | Qualifying | Applicants who have accepted offer. | ADMISSIONS |
| 5 | Enroll | Qualifying | Applicants who have enrolled. | ADMISSIONS |
| 6 | ApplicantWithdrawn | Disqualifying | Current admissions decision equals 'applicant withdrawal'. | ADMISSIONS |
| 7 | ProspectWithdrawn | Disqualifying | Recruit status equals 'no longer interested'. | RECRUIT |

Steps

Steps to add states to a funnel:

1. In the Funnels view, double-click your desired funnel to view its information.
2. Click **Model States** for your desired funnel.



3. You will have the opportunity to add qualifying, pending and/or disqualifying states to your funnel. Begin by clicking the **Edit** (✎) icon for **Add Qualifying State**. Or alternatively, you can simply click on the words **Add Qualifying State** to open the editing window.

4. The Edit Qualifying States view will appear. Click **Add State** to add a state to this funnel model.

Edit Qualifying States

Add Qualifying States

Name: *

Description: *

Expression: * ***

Banner Source: *

Cancel Complete

| Name | Description | Expression | Banner Source |
|------|-------------|------------|---------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Cancel Add State Save

5. Enter a name for your qualifying state in the **Name** field.
6. Enter a description for your qualifying state in the **Description** field, if desired.

7. Click the **Look Up** (⋮) icon to select an expression for your funnel model for the **Expression** field.
8. Choose an expression from the list and click **Select** to add it to your qualifying state.

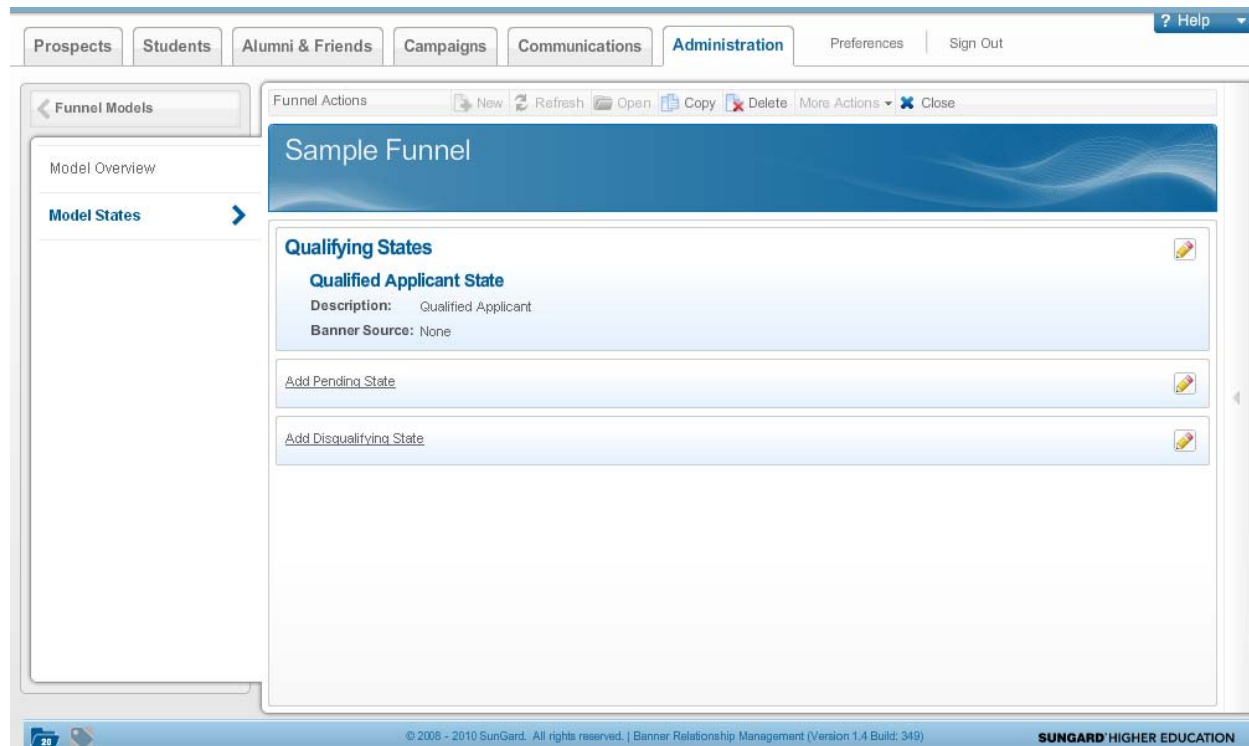
Note: You should create all expressions needed for the various states of your funnel *prior* to constructing your funnel model. For instructions on creating expressions, please refer to the Administration – Expressions workbook.

Expression Lookup

Displaying 39 rows.

| Expression | Description | Constituent Type |
|-------------------------------------|---------------------------------------|------------------|
| Funnel.Qualifying.Applicant | List of Applicants. | Prospect |
| Funnel.Qualifying.Enroll | Applicants who have enrolled. | Prospect |
| Funnel.Disqualifying.ApplicantWithd | Applicants who have withdrawn the | Prospect |
| Funnel.Qualifying.Admit | Applicants who have been accepte | Prospect |
| Funnel.Disqualifying.ProspectWithd | Prospects who have withdrawn fro | Prospect |
| Funnel.Qualifying.Prospect | List of Prospects. | Prospect |
| Funnel.Qualifying.Inquiry | Prospects who have at least one ir | Prospect |
| Funnel.Qualifying.Confirm | Applicants who have accepted offe | Prospect |
| Desirability.Acad.HS-GPA-High | Expression used for desirability fact | Prospect |
| Desirability.Acad.TestScore | Expression used for desirability fact | Prospect |

9. When your qualifying state is deemed satisfactory, click **Complete** to add it to the list of qualifying states.



10. You may click **Add State** to add additional qualifying states at this time, or click **Save** to save your changes and return to the Funnel States view.

11. You may repeat the above procedure to add pending states to your funnel model, which will put prospects who meet the criteria defined in the associated expression on hold in the funnel.

Edit Pending States

Add Pending States

Name: *

Description:

Expression: *

Banner Source: *

None

Cancel

Complete

| Name | Description | Expression | Banner Source |
|------|-------------|------------|---------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Cancel

Add State

Save

12. You may also repeat the process to add disqualifying states, which will expel students who meet the criteria in the associated expression from the funnel.

Note: Remember that once someone meets a disqualifying state, they cannot re-enter the same funnel.

Edit Disqualifying States

Add Disqualifying States

Name: *

Description:

Expression: *

Banner Source: *

None

Cancel

Complete

| Name | Description | Expression | Banner Source |
|------|-------------|------------|---------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Cancel

Add State

Save

Building a Funnel Model

As mentioned previously, you should build expressions to use in defining Funnel States *prior* to building your funnel model. Expression building instructions are detailed in the Administration – Expressions workbook. Once the expressions have been completed, the following steps should be taken for building the funnel model.

1. Create a new Funnel Model.
2. Create Qualifying States for your Funnel Model.

- **Inquiry**
- **Prospect**
- **Applicant**
- **Admitted**
- **Enrolled**

Use the delivered Funnel expressions, or tweak them to better fit your institution's policies, to define each of these Qualifying states.

3. Create the following Pending State for your funnel model.

- **Decision Pending**
Use your Decision Pending expression to define this state.

4. Create the following Disqualifying States for your funnel model:

- **Prospect Withdrew**
Use your ProspectWithdrew expression to define this state.
- **Admission Denied**
Use your AdmissionDenied expression to define this state.
- **Applicant Withdrew**
Use your ApplicantWithdrew expression to define this state.

Copying a Model Definition

Introduction

You can copy a funnel model to streamline the process of creating a new funnel model. Copying a funnel model also copies the states associated with that model.

Steps

1. From the Funnels menu of the **Administration** Tab, click on **Funnel Models**.

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 349) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is selected, showing a 'Funnel Models' section. This section features a search bar labeled 'Search by Name' and an 'Advanced Search' button. Below the search bar is a table with two columns: 'Name' and 'Description'. The table contains two rows: 'Admissions.Funnel' with description 'Admissions Funnel', and 'Sample Funnel' with description 'Sample Funnel'. To the right of the table, it says 'Displaying 2 rows.' A right sidebar contains a 'Funnel Instances' section and a 'Model Summary' section. The 'Model Summary' section includes an 'Overview' tab with fields for 'Description' (Sample Funnel) and 'Parameters' (Term, Level). The footer of the interface shows the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

| Name | Description |
|-------------------|-------------------|
| Admissions.Funnel | Admissions Funnel |
| Sample Funnel | Sample Funnel |

2. Click on a desired funnel model to highlight it.
3. Select **Copy** from the **Funnel Model Actions** bar to create a new model.



Copy Funnel Model

Name: * Copy Of Admissions.Funnel

Description: Admissions Funnel

Cancel Save

4. Enter a name for the model in the **Name** field.
5. If desired, enter a description for the model in the **Description** field.
6. Click **Save** to save your new model, or **Cancel** to exit without changes.



Steps

Steps to create a funnel instance:

1. From the Funnels view, select **Funnel Instances**.
2. From the Funnel Instance Actions bar, click **New**.

Create Funnel Instance

Funnel Model: * Admissions.Funnel ...

Name: * Admissions.Funnel

Description: Admissions Funnel

Term: * Fall 2010 (201110) ...

Level: * Undergraduate (UG) ...

Qualifier: ...

Begin Date: * Aug 12, 2010 12:00 AM

End Date: Aug 27, 2010 11:59 PM

Instance Calculation Schedule

[Add Schedule](#)

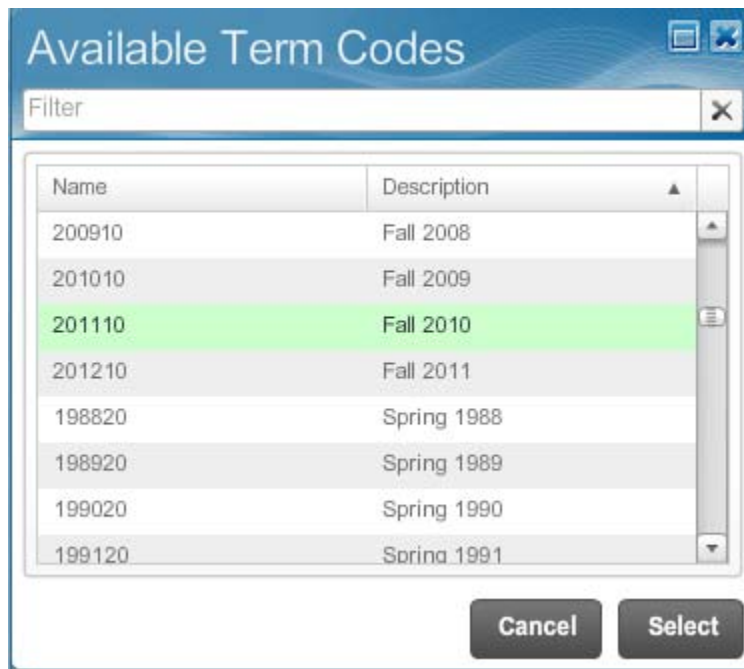
Cancel Save

3. Select a **Funnel Model** to be used with your instance.
4. Enter a name for your instance in the **Name** field.

Note: While there is no requirement that the name of the funnel instance be unique, you may want to uniquely name the funnel instance to make it easier to identify this specific funnel instance in the reporting product.

5. Enter a description for your instance in the **Description** field, if desired.

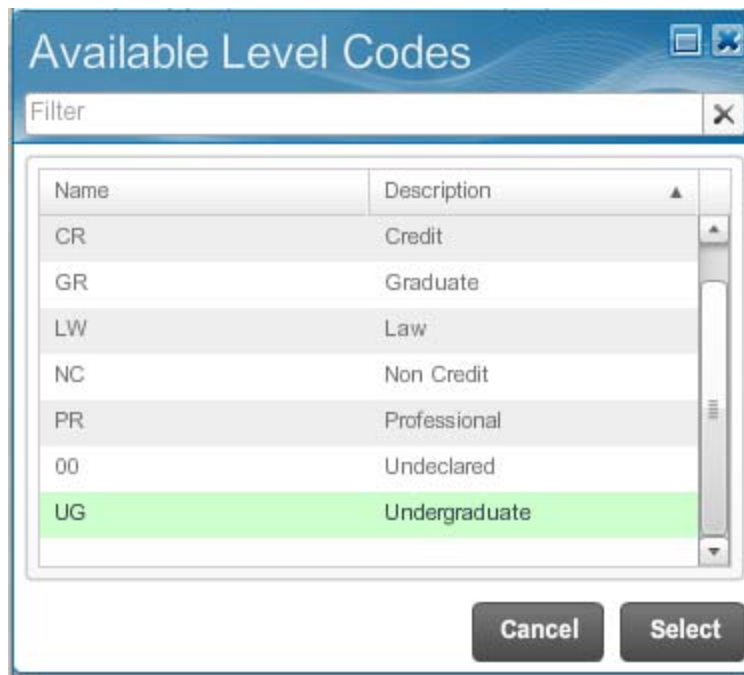
6. Enter a term for your instance in the **Term** field.



The 'Available Term Codes' dialog box features a title bar with standard window controls. Below the title is a 'Filter' text box with a clear button. The main area contains a table with two columns: 'Name' and 'Description'. The table lists several term codes, with '201110' and 'Fall 2010' highlighted in green. At the bottom right are 'Cancel' and 'Select' buttons.

| Name | Description |
|--------|-------------|
| 200910 | Fall 2008 |
| 201010 | Fall 2009 |
| 201110 | Fall 2010 |
| 201210 | Fall 2011 |
| 198820 | Spring 1988 |
| 198920 | Spring 1989 |
| 199020 | Spring 1990 |
| 199120 | Spring 1991 |

7. Enter a level for your instance in the **Level** field.



The 'Available Level Codes' dialog box has a similar layout to the term codes dialog. It includes a title bar, a 'Filter' text box, and a table with 'Name' and 'Description' columns. The table lists various level codes, with 'UG' and 'Undergraduate' highlighted in green. 'Cancel' and 'Select' buttons are located at the bottom right.

| Name | Description |
|------|---------------|
| CR | Credit |
| GR | Graduate |
| LW | Law |
| NC | Non Credit |
| PR | Professional |
| 00 | Undeclared |
| UG | Undergraduate |

Note: Only one term and level per instance may be used. If you want a funnel to run against both graduates and undergraduates for a particular term, you will need to create separate instances for each.

8. Select the qualifier (if being used) in the **Campus**, **Program**, or **College** field.

Note: The field displayed is dependent on the Qualifier selected when the model was created.

9. Click the **Add Schedule** link.
10. Select how often you would like to calculate the funnel in the **Recurrence** field.
11. In this example, the options for weekly recurrence are shown. Select the day or days of the week to calculate the funnel model.

Create Instance Calculation Schedule

Recurrence: Weekly

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday
☒ Thursday ☐ Friday ☐ Saturday

Time: 3:30 PM (GMT -04:00) EDT America/New_York

Start Date: Aug 12, 2010 12:00 AM

Stop Date: Aug 27, 2010 11:59 PM

Cancel Save

12. Select a specific **Time** for the calculation, if desired.
 13. Select a time zone you want to use for the **Time** field.
 14. In the Instance Calculation Scheduler fields, select the **Start Date** for the time period over which the funnel model will be calculated.
- Note: The Start Date is the first date of the schedule for calculation. You may change the schedule's Start Date or Time as needed.
15. Select the **Stop Date** for the time period over which the funnel model should be applied, if desired.

16. Click **Save** to save the calculation schedule.

17. Click the Save button again to save the funnel instance.

Note: it is generally suggested that funnel instances should be scheduled to run overnight each night. This will ensure that prospect funnel statuses are updated each night to reflect any changes. It is suggested that the calculation takes place when the system is not busy, as this process involves checking of all prospect records in the Banner database.

Editing Funnel Instances

Introduction

You may wish to edit a funnel instance after it has been created, but prior to its execution.

Funnel Instances view

The screenshot displays the 'Funnel Instances' view within a software application. 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' button.

The main content area is divided into three sections:

- Left Sidebar:** Contains a 'Funnel Models' section with a 'Funnel Instances' link and a right-pointing arrow.
- Central Panel:**
 - At the top, there is a 'Funnel Instance Actions' bar with buttons for 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'.
 - Below this is a header for 'Funnel Instances' with a 'Search by Name' input field and an 'Advanced Search' dropdown.
 - A table displays the data, with the first row showing: 'Admissions.Funnel', 'Ready', 'Fall 2010 (20', 'Undergraduat', and 'Yes'.
 - Below the table, it says 'Displaying 1 row.' followed by several empty rows.
- Right Sidebar:** Contains two sections: 'Instance Summary' and 'States Chart', both with downward-pointing arrows.

Steps

1. Select a funnel instance to view its information.

The screenshot shows a web application interface with a top navigation bar containing tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). There are also links for Preferences and Sign Out, and a Help dropdown. The main content area is titled 'Admissions.Funnel' and includes an 'Instances Actions' bar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. The 'Instance Overview' section displays the following details:

| | |
|-----------------------------------|-----------------------|
| Funnel Model: | Admissions.Funnel |
| Description: | Admissions Funnel |
| Term: | Fall 2010 (201110) |
| Level: | Undergraduate (UG) |
| Status: | Started |
| Active: | Yes |
| Last Successful Execution: | |
| Begin Date: | Aug 12, 2010 12:00 AM |
| End Date: | Aug 27, 2010 11:59 PM |

Below this is the 'Instance Calculation Schedule' section, which states: 'Weekly every Friday at 3:30 PM (America/New_York) starting Aug 12, 2010 12:00 AM and stopping on Aug 27, 2010 11:59 PM'. At the bottom of the overview are 'Stop Instance' and 'Suspend Instance' buttons. On the right side, there is an 'Instance Summary' panel with an 'Overview' section showing 'Description: Admissions Funnel', 'Status: Started', 'Last Successful Execution:', and 'Execution Status: Calculating'. Below this is a 'States Chart' section with a 'States Overview' sub-section that says 'No State Data to Display'.

2. Click the **Edit** (✎) icon in the Instance Overview section to edit basic information for this instance.

The 'Edit Funnel Instance' dialog box contains the following fields:

- Name:** * Admissions.Funnel
- Description:** Admissions Funnel
- Begin Date:** Aug 12, 2010 12:00 AM
- End Date:** Aug 27, 2010 11:59 PM

At the bottom of the dialog are 'Cancel' and 'Save' buttons.

3. Edit the **Name** and **Description** fields as desired.
4. Edit the **End Date** for this instance as desired.

5. Note that the Begin Date cannot be edited. If you wish to change the Begin Date, Funnel Model, Term or Level for a funnel instance, you will need to create a new funnel instance.
6. Click **Save** to apply your changes.
7. Click the Edit in the Instance Schedule section to edit the schedule for this funnel instance.

The screenshot shows a dialog box titled "Edit Instance Calculation Schedule". It contains the following fields and controls:

- Recurrence:** A dropdown menu with "Daily" selected.
- Time:** A dropdown menu with "None" selected.
- Start Date:** A date picker icon, a time dropdown set to "12:00 AM", and a time zone dropdown set to "(GMT -04:00) EDT America/New_York".
- Stop Date:** A date picker icon, a time dropdown set to "11:59 PM", and a time zone dropdown.

At the bottom right, there are "Cancel" and "Save" buttons. A context menu is open over the "Recurrence" dropdown, showing options: "None", "One Time", "Daily" (highlighted), "Weekly", and "Monthly".

8. Edit the **Start Date**, **Time** and **Repeat On** fields as necessary.
9. Click **Save** to apply your changes.

Viewing Funnel Results

Introduction

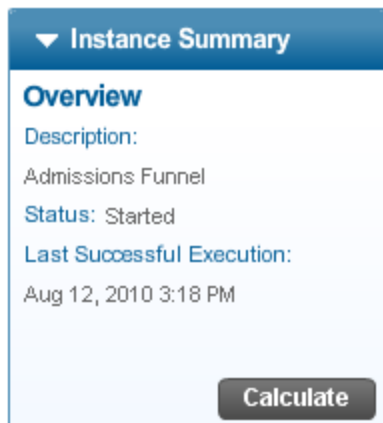
Once a funnel instance has executed, its results may be viewed in Relationship Management.

Calculating Funnel Results

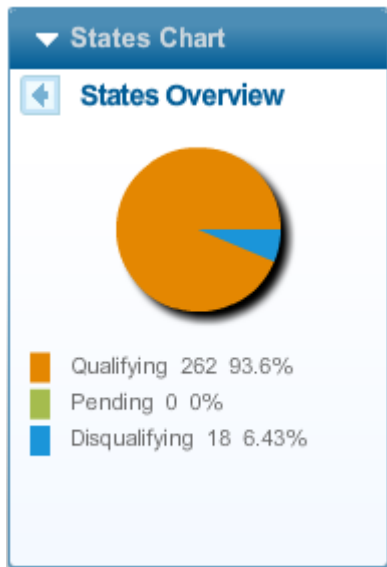
The Instance Summary sidebar displays the description of the currently selected funnel, its status and its last execution date and time.

Normally, a funnel runs at regular intervals defined by its instance schedule, but there may be times when you wish a funnel to be executed immediately. To do so, click the **Calculate** button.

Note: Be **very cautious** in using the Calculate function. If your funnel contains a large number of prospects, recalculating the funnel may tie up the system during the middle of a workday. Only certain administrators should use the calculate button. It is recommended that the calculation be scheduled to run regularly overnight.



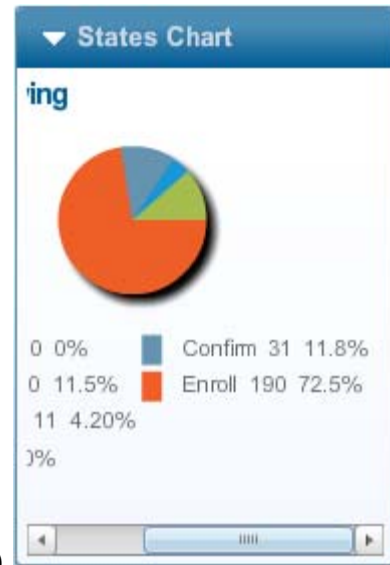
The **States Chart** sidebar displays the results of the funnel (once executed) in a pie-chart format.



You may click on the Qualifying, Pending or Disqualifying wedges to break the results down further.



(scrolling to view more...)



Alternatively, to view a specific prospect's funnel status, you may open that prospect's record in the Prospects workspace and view the Funnel History tab.

The screenshot displays the 'Prospects' workspace interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. A search bar is located on the left. The main content area shows the profile of Jacob Smith, with sections for Biographical, Academic, Personal Outlook, and Recruitment. The right sidebar contains a 'Recruit Track' section and a 'Profile Summary' section. The 'Profile Summary' section has two tabs: 'Card' and 'Funnel History', with 'Funnel History' being the active tab. Below the tabs, it shows 'Viewing: Associated history' and a section titled 'Admissions.Funnel' with a status of 'Applicant (Current State)' and a timestamp of 'Aug 12, 2010 3:18 PM'. The 'Funnel History' tab is highlighted with a red border.

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

Search for Prospects

Profile Actions: New, Refresh, Open, Copy, Delete, More Actions, Close

Jacob Smith

Biographical

Residence: In state Resident | Ethnicity: Black or African-American
Citizenship: Citizen | Gender: Male

Academic

Program: BS in Biology | Major: Biology
Level: Undergraduate | Degree: Bachelor of Arts
High School: Malvern High School | GPA: 3.40
College: | Test Scores: SAT Mathematics 580; SAT Verbal 550

Personal Outlook

Interests: Vocal Music; Intramural Athletics
Attributes:
Sources:

Recruitment

Create Interaction | Contact

Recruit Track

Fall 2010-1 UG Biology

Profile Summary

Card | **Funnel History**

Viewing: Associated history

Admissions.Funnel

Applicant (Current State)
Aug 12, 2010 3:18 PM

Appendix A – Tagging Funnel States



Tag Funnel States to related Banner data

Tag funnel states

For institutions that are planning to implement Recruiting and Admissions Performance, each Funnel State in Relationship Management will need to be tagged to the related data type in the Banner Database.

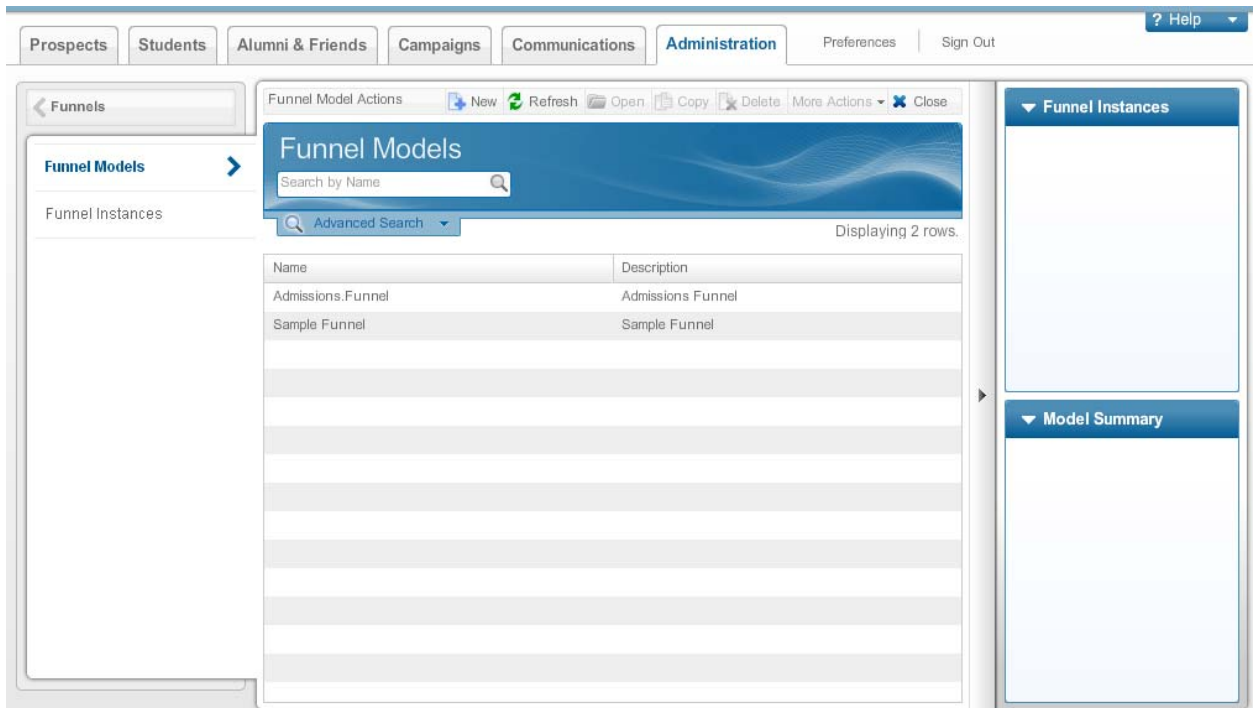
A Funnel State of Prospect will need to be linked to recruitment data in Banner, while a Funnel State of Applicant or Accept will need to be linked to admissions data and a Funnel State of Enrolled will need to be linked to learner data. The Banner Source tags enable the Recruiting and Admissions Performance application to access the correct set of data for prospects based on their current state.

The default for this setting in Relationship Management is 'None'.

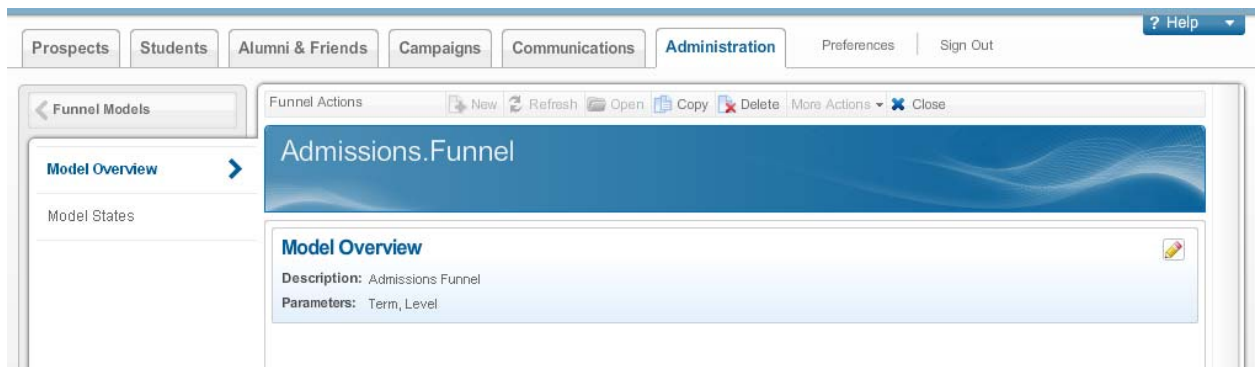
Steps

Follow these steps to configure Funnel states.

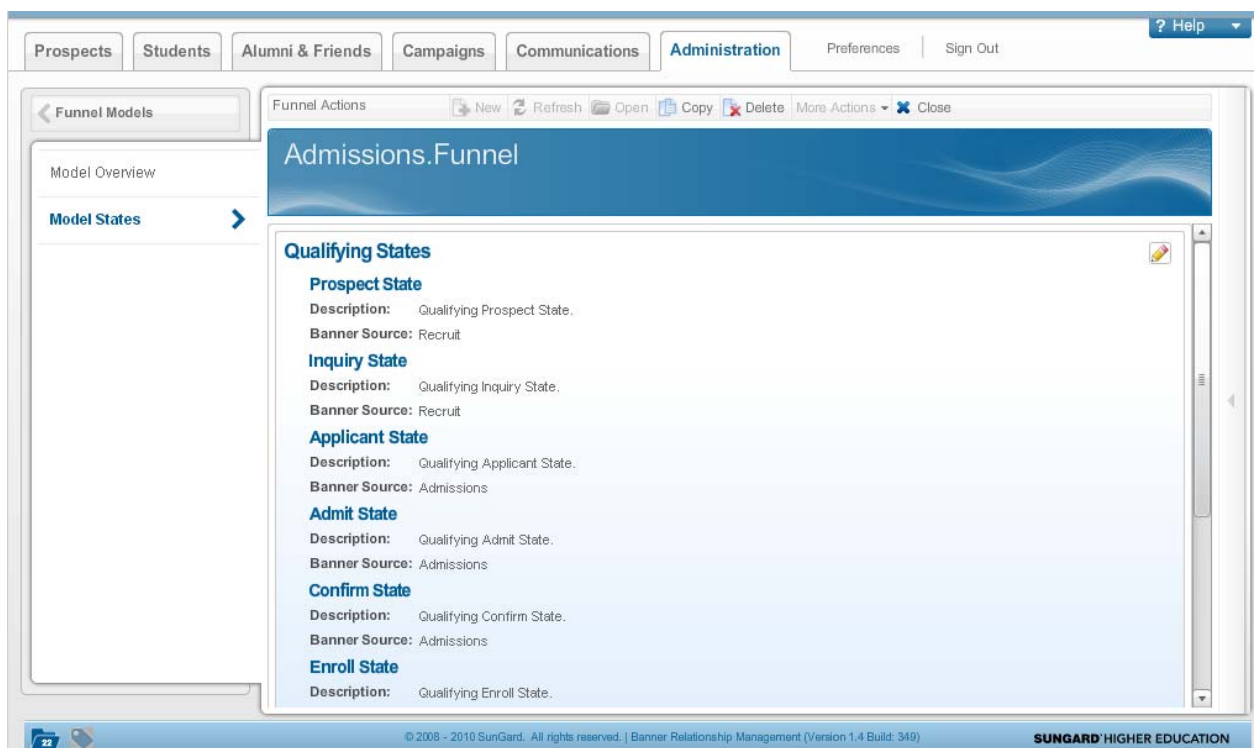
1. From the Administration tab, select Funnel Models.




2. Double-click on the Funnel Model of your choice to open the Model Overview.



3. Click on Model States in the left-hand window.

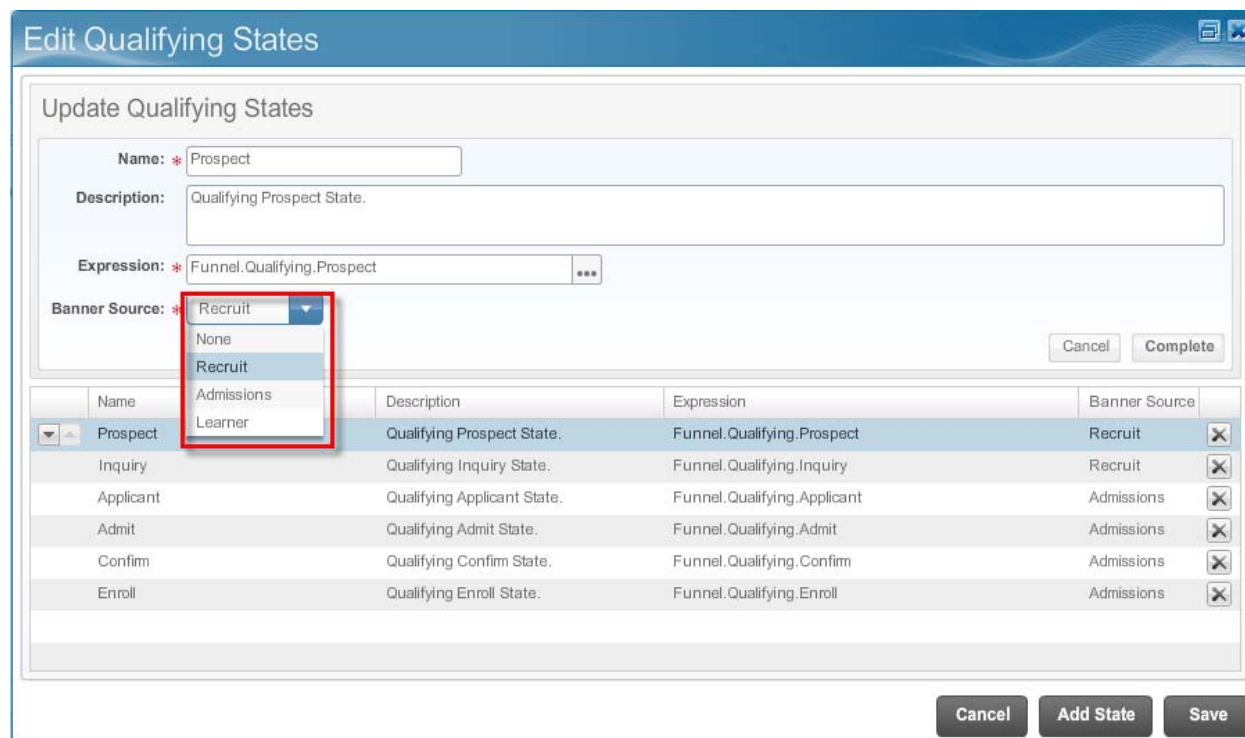


4. Click the **Edit** () icon in the Qualifying States window.



| Name | Description | Expression | Banner Source | |
|-----------|-----------------------------|-----------------------------|---------------|---|
| Prospect | Qualifying Prospect State. | Funnel.Qualifying.Prospect | Recruit |  |
| Inquiry | Qualifying Inquiry State. | Funnel.Qualifying.Inquiry | Recruit |  |
| Applicant | Qualifying Applicant State. | Funnel.Qualifying.Applicant | Admissions |  |
| Admit | Qualifying Admit State. | Funnel.Qualifying.Admit | Admissions |  |
| Confirm | Qualifying Confirm State. | Funnel.Qualifying.Confirm | Admissions |  |
| Enroll | Qualifying Enroll State. | Funnel.Qualifying.Enroll | Admissions |  |

5. Double-click on Prospect or any other Qualifying, Pending or Disqualifying State to open it.



Edit Qualifying States

Update Qualifying States







Name: * Prospect

Description: Qualifying Prospect State.

Expression: * Funnel.Qualifying.Prospect ...

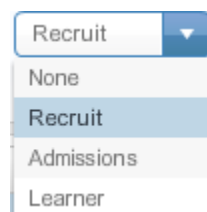
Banner Source: * Recruit

Cancel Complete

| Name | Description | Expression | Banner Source | |
|-----------|-----------------------------|-----------------------------|---------------|---|
| Prospect | Qualifying Prospect State. | Funnel.Qualifying.Prospect | Recruit |  |
| Inquiry | Qualifying Inquiry State. | Funnel.Qualifying.Inquiry | Recruit |  |
| Applicant | Qualifying Applicant State. | Funnel.Qualifying.Applicant | Admissions |  |
| Admit | Qualifying Admit State. | Funnel.Qualifying.Admit | Admissions |  |
| Confirm | Qualifying Confirm State. | Funnel.Qualifying.Confirm | Admissions |  |
| Enroll | Qualifying Enroll State. | Funnel.Qualifying.Enroll | Admissions |  |

Cancel Add State Save

6. Notice the highlighted **Banner Source** drop-down box. This drop-down provides the following options:




Recruit

None

Recruit

Admissions

Learner

7. The default setting for this drop-down is 'None'. Select 'Recruit' for the **Prospect** Funnel State and click Complete ()
8. Click **Save** to save the change.

Repeat these steps for each of your Funnel States, tagging each State to the appropriate Recruit, Admissions or Learner data in Banner.

Pending States

Pending states

Pending state implementation is geared to things like holds, where you want to keep a person in that pending hold state even if they satisfy the conditions for other states, otherwise they would jump around between various pending states.

You will need to factor this into your expressions in order to get the desired effect. The funnel algorithm is described below. Notice the parts shaded in yellow. Basically, once someone is in a pending state, they will stay in that pending state as long as the expression conditions for that state are satisfied. Only if they no longer satisfy the conditions for that pending state will they go to the highest-level pending state. In other words, once someone is in a pending state, they won't move to any other pending state until they no longer meet the conditions for the pending state that they are in.

This means that unless you craft the expressions to take this into account, if someone is in a pending inquiry state, they won't upgrade to a pending applied state even if that is higher than the pending inquiry state. To avoid this is to make sure that the pending inquiry state expression excludes anyone that would be in the pending applied state. In other words, the pending inquiry state must not include people that would satisfy the conditions for a higher pending state.

Funnel algorithm examples

If the person is currently in a disqualifying state

```
IF (current-state is a DISQUALIFYING_STATE) THEN
  update the time only on the current disqualifying state,
  no move, and no other evaluations are to be performed
END-IF
```

If the person is currently in a pending state

```
IF (current-state is a PENDING_STATE) THEN
  IF (criteria for a DISQUALIFYING state is met) THEN
    create the highest-level DISQUALIFYING state as the current state
  ELSE-IF (criteria-for-current-pending-state still satisfied) THEN
    update the time only, no move, and no other evaluations are to be
    performed
  ELSE-IF (criteria for a different PENDING state is met) THEN
```

create the highest-level PENDING state as the current state (unless it already exists as a state, then just update the time)

ELSE EVALUATE_OTHER_STATES (these will all be QUALIFYING states) and place person in

highest level state following this logic:

IF (evaluated state is higher than any other existing state) THEN
create the new state with the current time and new entered date

END-IF

IF (some-other-state is higher or equal to the evaluated state) THEN
update the time only on the equal-to-or-higher state

END-IF

IF (they don't qualify for any state; i.e. they don't exist in any population)
THEN

do nothing (this will make the pending state history
and the person will have no current state)

END-IF

END-IF

END-IF

If the person is currently in a qualifying state

IF (current-state is a QUALIFYING_STATE) THEN

IF (criteria for a DISQUALIFYING state is met) THEN

create the highest-level DISQUALIFYING state as the current state

ELSE-IF (criteria for a PENDING state is met) THEN

create the highest-level PENDING state as the current state (unless it already exists as a state, then just update the time)

ELSE EVALUATE_OTHER_STATES (these will all be QUALIFYING states) and place person in

highest level state following this logic:

IF (evaluated state is higher than any other existing state) THEN
create the new state with the current time and new entered date

END-IF

IF (some-other-state is higher or equal to the evaluated state) THEN
update the time only on the equal-to-or-higher state

END-IF

IF (they don't qualify for any state; i.e. they don't exist in any population)
THEN

update the time only on the current qualifying state

END-IF

END-IF

END-IF