

Banner Enrollment Management Suite Relationship Management Organizations and Communication Configurations Training Workbook

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Revision History Log

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08/13/2010	New version that supports the new Organizations and Communication Configurations features in the Banner Relationship 1.4 software.

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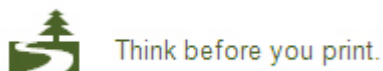


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Introduction to Organizations and Communication Configurations



Course goal

The goal of this course is to introduce Relationship Management administrators to organizations and communication configurations functionality, allowing them to create and maintain multiple internal organizations with distinct sender and reply-to accounts.

Course objectives

At the end of this session, participants will be able to:

- add a new organization
- edit an existing organization
- delete an organization
- create a mailbox account
- edit a mailbox account
- set up an organization address
- modify an organization address.

Intended audience

Administrators of Banner Relationship Management.

Prerequisites

To complete this course, you should have

- completed the Relationship Management Overview workbook
- access to the **Administration** tab of Banner Relationship Management.

Maintaining Organizations



Introduction

This section provides procedures for creating and maintaining organizations.

Objectives

At the end of this section, participants will be able to:

- add a new organization
- edit an existing organization
- delete an organization.

Organization Overview

Introduction

Organizations allow your institution to send e-mail from various departments within your institution. The organization structure has a single root node which is named 'Root.' The Root node may contain zero or more child organizations. All interactions and communication templates must be associated with an organization. Organizations can be created and maintained using the **Organizations** link on the **Administration** tab.

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the **Communication Configuration** link.

Organizations view

The screenshot shows the SunGard Banner Relationship Management interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). The left sidebar contains a list of navigation links: Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags, Categories, Organizations (selected), and Communication Configuration. The main content area is titled 'Organizations' and features a search bar with the text 'Search by Name'. Below the search bar is a table with the following data:

Name	Parent Organization	Description
Root Organization		The root organization.
Alumni Development	Root Organization	
Advising Office	Root Organization	Advising
Admissions	Root Organization	Admissions and Recruiting

At the bottom right of the table area is a button labeled 'Add Child Organization'. The footer of the interface displays the copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 334)' and the SunGard Higher Education logo.

Adding a New Organization

Introduction

Only administrators and specified users can create and maintain organizations in Relationship Management. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create organizations, you will have an **Organizations** link on the **Administration** tab. From this screen, you can view and edit existing organizations and create new ones.

To create a new organization, select the Root organization then click the **Add Child Organization** button at the bottom of the workspace and type the name and description of the organization you wish to create. Once you save the organization, it will be added to the list of existing organizations.

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the **Communication Configuration** link. The organization is not available to use when contacting profiles by e-mail until a mailbox account is set up.

Organizations view

The screenshot shows the 'Organizations' view in the SunGard Banner Relationship Management system. The navigation menu on the left includes Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags, Categories, **Organizations**, and Communication Configuration. The main content area has a header with 'Organizations' and a search bar. Below the header is a table with the following data:

Name	Parent Organization	Description
Root Organization		The root organization.
Alumni Development	Root Organization	
Advising Office	Root Organization	Advising
Admissions	Root Organization	Admissions and Recruiting

An 'Add Child Organization' button is located at the bottom right of the table. The footer of the page includes the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 334)' and the 'SUNGARD HIGHER EDUCATION' logo.

Steps

Follow these steps to create a new organization.

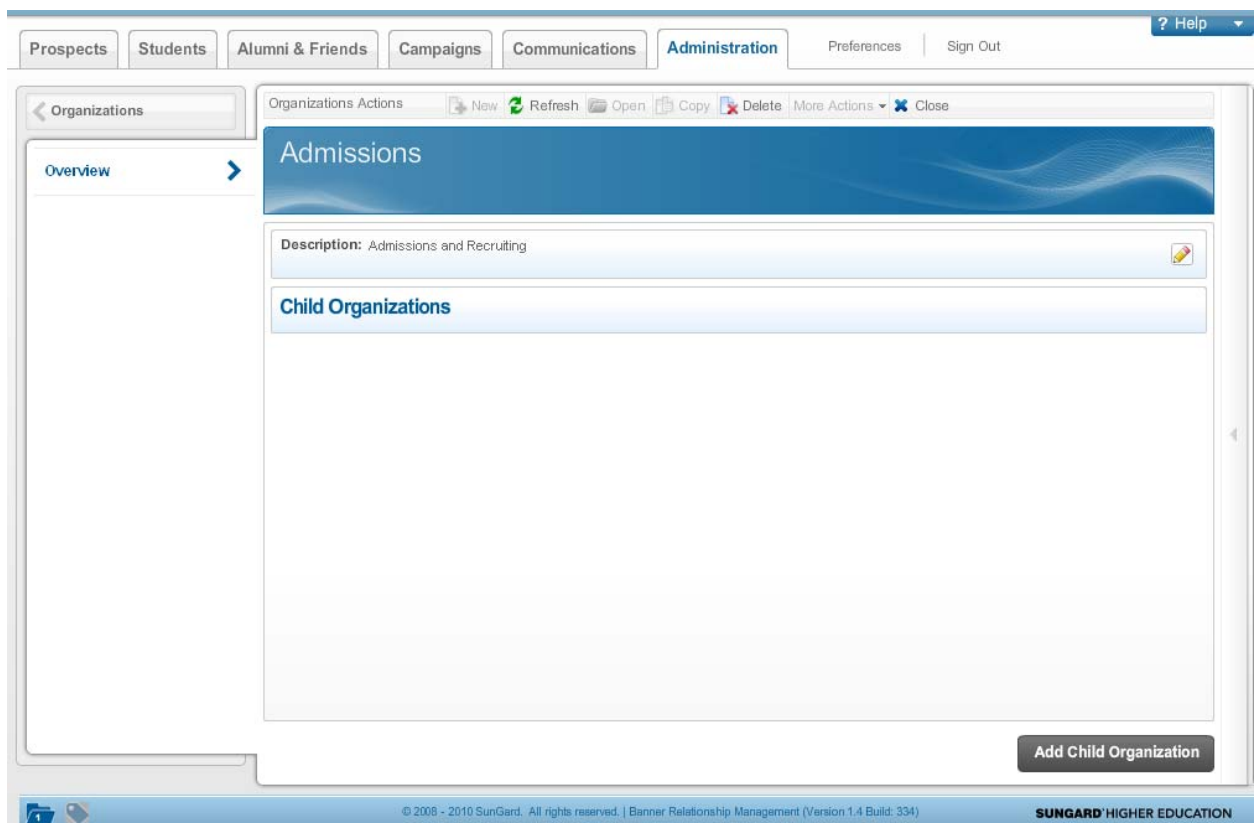
1. Click the **Administration** tab.
2. Click the **Organizations** link.
3. Select the **Root Organization** option from the list to create a new organization under the root level or select any existing organization to create a new child organization under the selected organization.
4. Click the **Add Child Organization** button.
5. Enter a name of the child organization in the **Name** field.
6. Enter a description of the child organization, if desired, in the **Description** field.
7. Click the **Save** button.

Editing an Existing Organization

Introduction

The Organizations Overview page displays high level information about an organization including the organization description and the name and description of any child organizations that exist. You can click the **Edit** (pencil) icon to edit the name or description of the organization. You can change the name of the organization and/or add or modify a description in the Edit Organization window.

Organization Overview



Steps

Follow these steps to edit an existing organization.

1. From the **Administration** Tab, click the **Organizations** link.
2. Double-click the name of the organization you want to edit to open it.
3. Alternatively, click the name of the organization you want to edit then click the **Open** button on the Organization Actions toolbar.
4. From the Overview window, click the **Edit** (pencil) icon.
5. Edit the name or description as needed.



The screenshot shows a dialog box titled "Edit Organization". It has a blue header bar with the title and window control icons. The main area contains two text input fields. The first field is labeled "Name" with a red asterisk, indicating it is required, and contains the text "Admissions". The second field is labeled "Description" and contains the text "Admissions and Recruiting". At the bottom right of the dialog are two buttons: "Cancel" and "Save".

6. Click the **Save** button to save the changes, or **Cancel** to exit without changes.

Deleting an Organization

Introduction

Organizations that are no longer needed can be deleted using the **Organizations** link on the **Administration** tab. Select the organization you want to delete from the list of existing organizations then click the **Delete** button on the Organization Actions toolbar.

The Confirm Delete window opens asking you to confirm you want to delete the organization. Click the **Yes** button to complete the process.

Note: Only administrators and specified users can delete organizations in Relationship Management. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create/delete organizations, you will have an **Organizations** link on the **Administration** tab.

Organizations view

The screenshot shows the 'Organizations' view within the 'Administration' tab. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). A sidebar on the left lists various system components, with 'Organizations' highlighted. The main content area features a toolbar with actions like New, Refresh, Open, Copy, Delete, and More Actions. Below the toolbar is a table titled 'Organizations' with columns for Name, Parent Organization, and Description. The table displays five rows of data, with 'Student Services' selected. An 'Add Child Organization' button is located at the bottom right of the table.

Name	Parent Organization	Description
Root Organization		The root organization.
Alumni Development	Root Organization	
Advising Office	Root Organization	Advising
Admissions	Root Organization	Admissions and Recruiting
Student Services	Root Organization	

Steps

Follow these steps to delete an organization.

1. From the **Administration** Tab, click the **Organizations** link.
2. Select the name of the organization you want to delete.
3. Click the **Delete** button.
4. Click the **Yes** button to confirm you want to delete the selected organization.



Maintaining Communication Configurations



Introduction

This section provides procedures for creating and maintaining communication configurations for organizations.

Objectives

At the end of this section, participants will be able to:

- create a mailbox account
- edit a mailbox account
- set up an organization address
- modify an organization address.

Communication Configuration Overview

Introduction

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the **Communication Configuration** link. The organization is not available to use when contacting profiles by e-mail until a mailbox account is set up.

Using mailbox accounts, you will be able to specify the email address for the sender account and the reply-to account. You may also specify the letter address information and e-mail address information to use for an organization.

Note: Only administrators and specified users can create or modify mailbox and organization addresses. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create/delete organizations, you will have the **Communication Configuration** link on the **Administration** tab.

Communication Configuration view

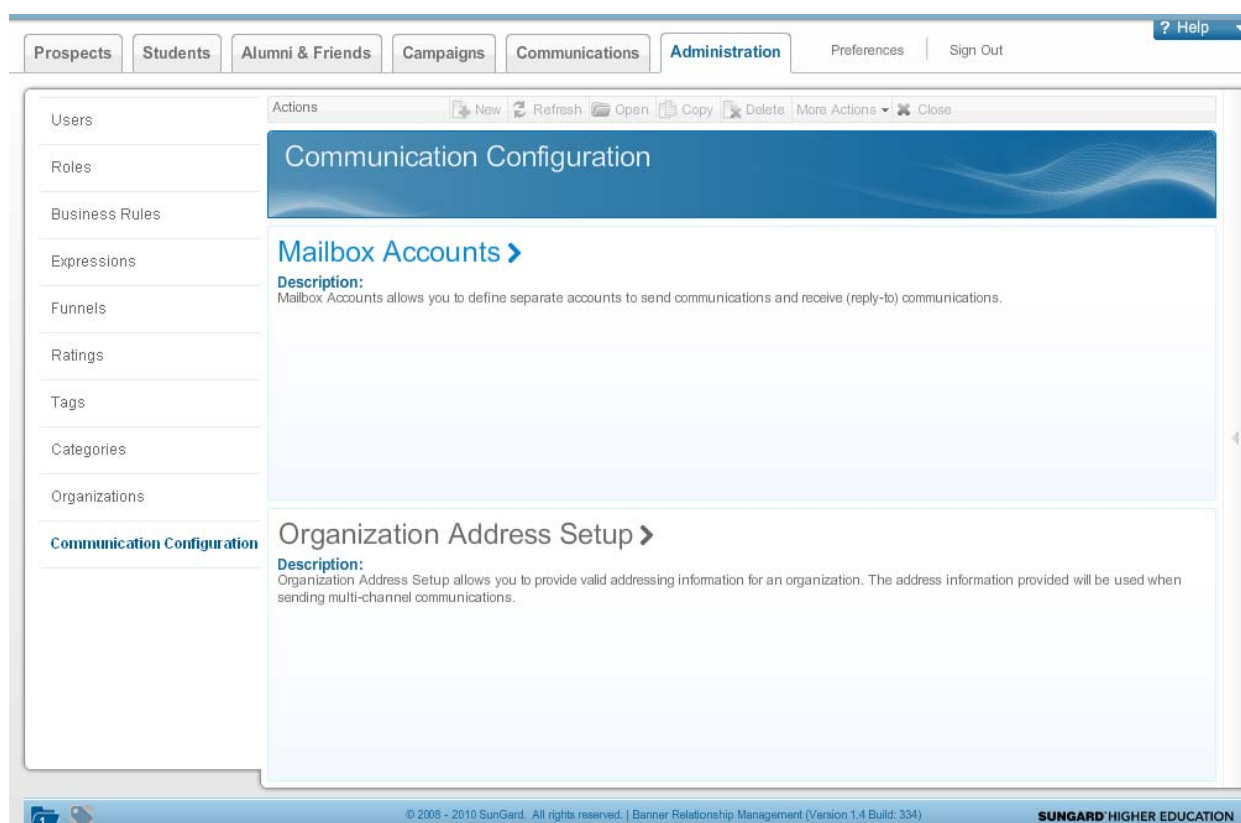
The screenshot displays the 'Communication Configuration' view within the Banner Relationship Management system. The interface features a top navigation bar with tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications', and 'Administration' (which is currently selected). To the right of the tabs are links for 'Preferences' and 'Sign Out', and a 'Help' button. A left-hand sidebar lists various system components: 'Users', 'Roles', 'Business Rules', 'Expressions', 'Funnels', 'Ratings', 'Tags', 'Categories', 'Organizations', and 'Communication Configuration' (which is highlighted). The main content area is titled 'Communication Configuration' and contains two sections: 'Mailbox Accounts' and 'Organization Address Setup'. Each section includes a 'Description' and a right-pointing arrow. The 'Mailbox Accounts' section describes the ability to define separate accounts for sending and receiving communications. The 'Organization Address Setup' section describes the ability to provide valid addressing information for an organization. At the bottom of the page, a footer contains the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 334)' and the 'SUNGARD HIGHER EDUCATION' logo.

Creating a Mailbox Account

Introduction

You can establish and maintain separate mailbox accounts for each organization using the **Communication Configuration** link. Using mailbox accounts, you will be able to specify the email address for the sender account and the reply-to account. You may also specify the letter address information and e-mail address information to use for an organization on the **Communication Configuration** link. Once the mailbox accounts are established, you can associate them with the organization through the **Organization Address Setup** link.

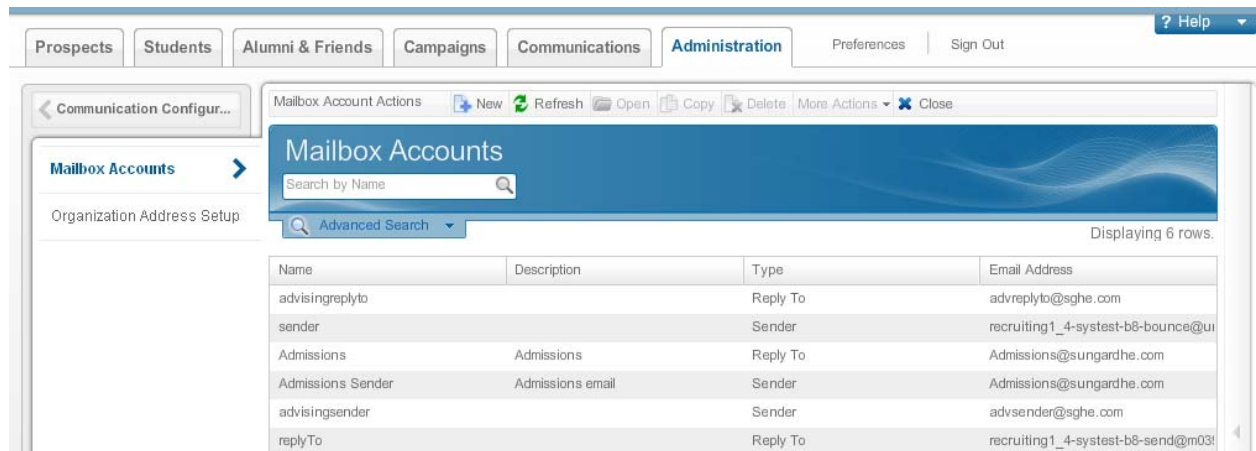
To create a new mailbox account, select the **Mailbox Accounts** link.



Mailbox Accounts view

A list of existing mailbox accounts will display. Use the **New** button on the Mailbox Account Actions toolbar to add a new mailbox account.

Note: Since you may have multiple sender and reply to accounts, you may want to put the organization name into the name of the account. Notice in this example that you can easily tell the difference between the Admissions and Advising Sender mailbox accounts.



Create Mailbox Account window

The Create Mailbox Account window allows you to select a Sender or Reply To type of account. You can then add a name, description, user name, password, e-mail address and display name. Notice that only items marked with a red asterisk* are required. After entering the mailbox account information, click the **Save** button to store your changes.

The 'Create Mailbox Account' window is a form with the following fields and controls:

- Type ***: A dropdown menu currently set to 'Reply To'.
- Name ***: A text input field.
- Description**: A text input field.
- Username ***: A text input field.
- Password**: A text input field.
- Confirm Password**: A text input field.
- Email Address ***: A text input field.
- Display Name**: A text input field.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

Steps

Follow these steps to create a mailbox account.

1. Click the **Administration** tab.
2. Click the **Communication Configuration** link.
3. Click the **Mailbox Accounts** link.
4. Click the **New** button on the Mailbox Account Actions toolbar.
5. Select a mailbox account type in the **Type** field.

Note: The default value is *Reply To* but you can use the drop-down arrow to select *Sender*.

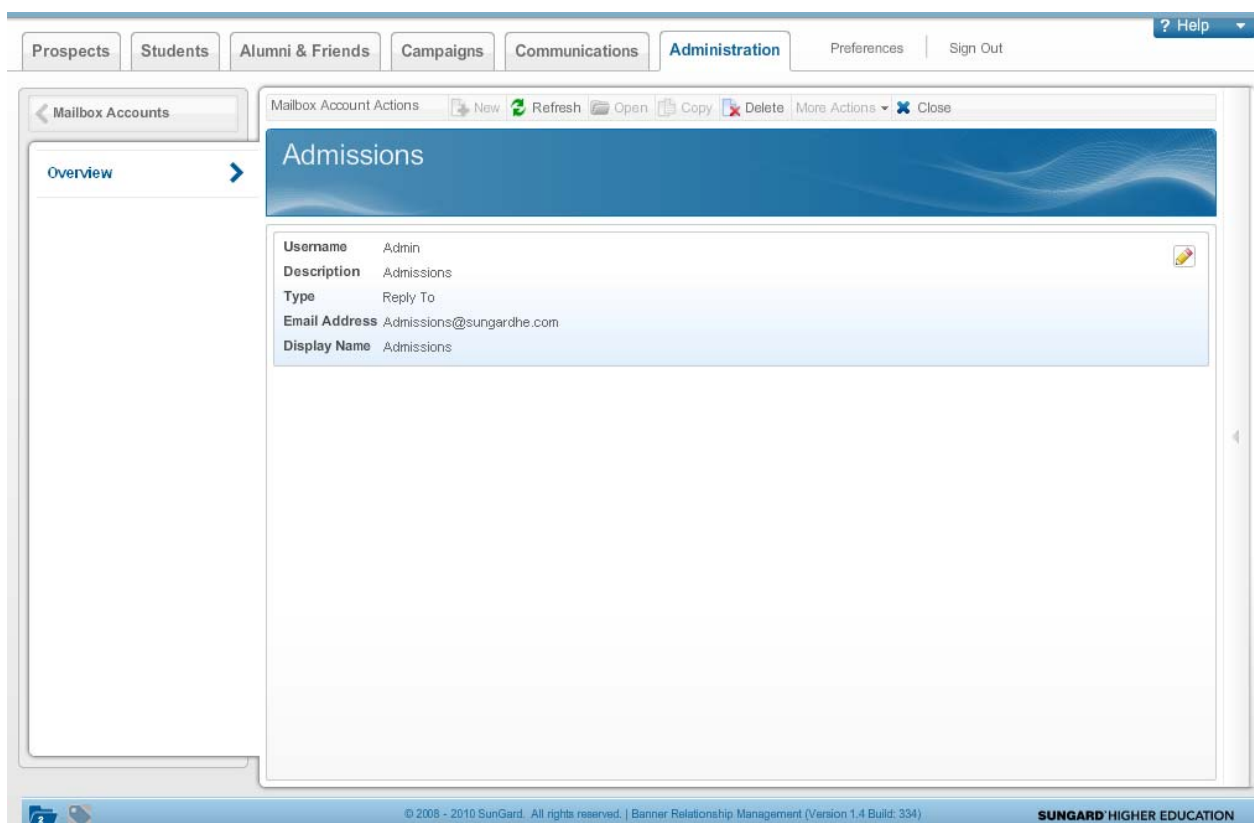
6. Enter a name for the mailbox account in the **Name** field.
7. Enter the user name associated with the mailbox account in the **Username** field.
8. Enter the password associated with the mailbox account in the **Password** field.
9. Reenter the password in the **Confirm Password** field.
10. Enter the e-mail address associated with the mailbox account in the **Email Address** field.
11. Enter a display name, if desired, in the **Display Name** field.
12. Click the **Save** button.

Editing a Mailbox Account

Introduction

The Overview page for Mailbox Accounts displays high level information about a mailbox account including the user name, description, type, e-mail address, and display name. You can click the **Edit** (pencil) icon to edit any of the displayed information except the type.

Overview




Edit Mailbox Account window

To edit a mailbox account, you can change the name of the mailbox account and/or add or modify a description in the Edit Mailbox Account window. You could also add/or modify the **Username**, **Password/Confirm Password**, **Email Address**, and **Display Name** fields. Click the **Save** button to save your changes.



Steps

Follow these steps to edit a mailbox account.

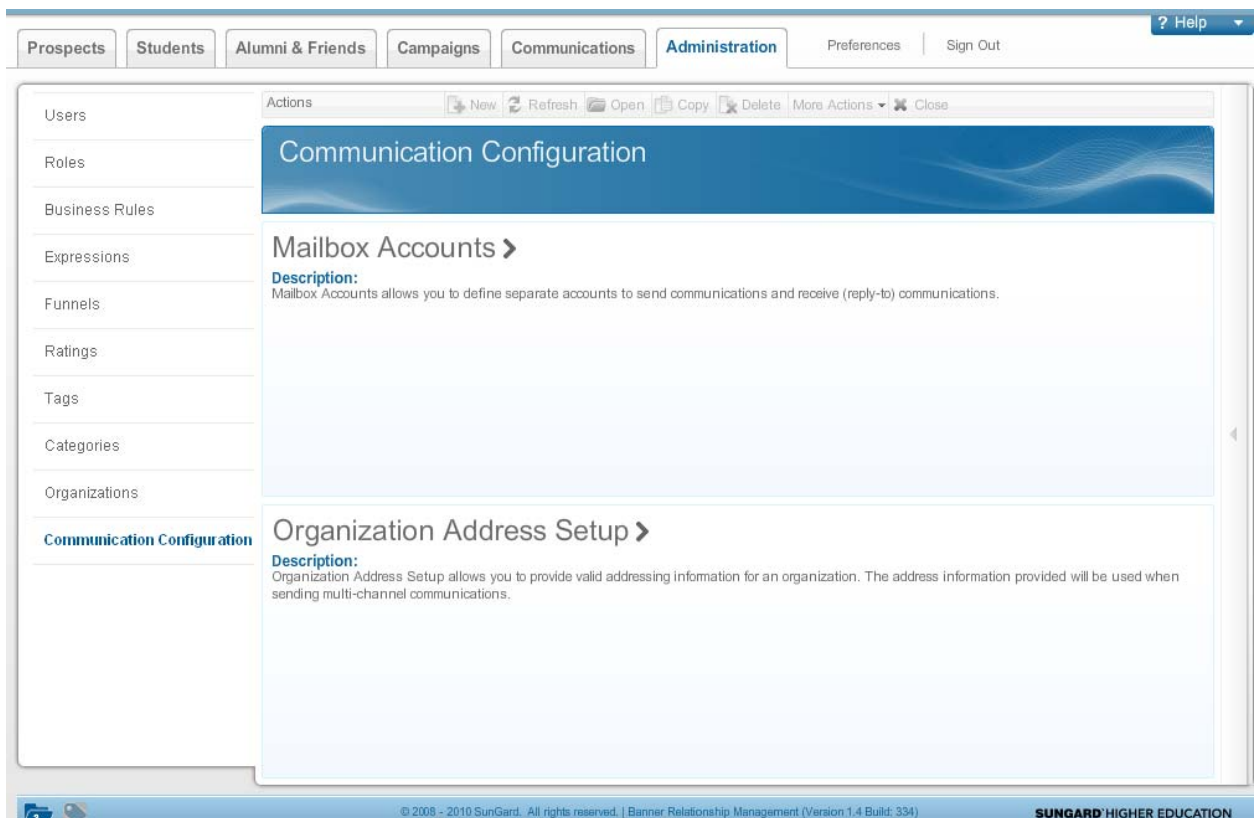
1. From the **Administration** Tab, click the **Communication Configuration** link.
2. Click the **Mailbox Accounts** link
3. Double-click the name of the mailbox account you want to edit to open it.
4. Alternatively, click the name of the mailbox account you want to edit then click the **Open** button on the Mailbox Accounts Actions toolbar.
5. From the Overview window, click the **Edit** () icon.
6. Edit the fields as needed.
7. Click the **Save** button to save the changes, or **Cancel** to exit without changes

Setting Up an Organization Address

Introduction


Once the mailbox accounts are established, you can associate them with the organization through the **Organization Address Setup** link. You can specify the letter address information and e-mail address information to use for an organization by selecting the **Organization Address Setup** link on the **Communication Configuration** view.

Communication Configuration view



Create Organization Address Setup Window

The Create Organization Address Setup window allows you to use a **Lookup** icon to select the organization, sender account, and reply to account you created previously. You can then add an e-mail address. Notice that all items are marked with a **red asterisk*** which means they are all required. After entering the organization address setup information, click the **Save** button to store your changes.



The image shows a window titled "Create Organization Address Setup". It contains four input fields, each with a red asterisk indicating it is required:

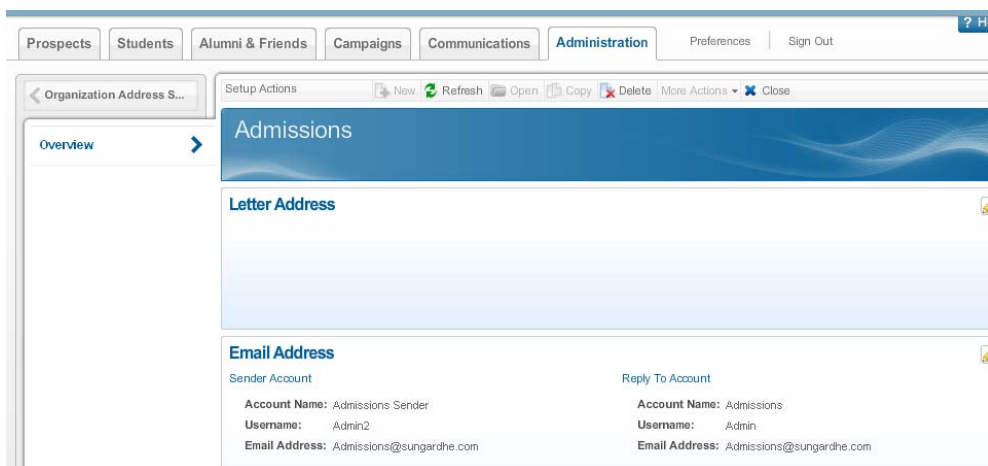
- Organization *
- Sender Account: *
- Reply To Account: *
- From Email: *

Each input field has a small "Lookup" icon (three dots) to its right. At the bottom right of the window are two buttons: "Cancel" and "Save".

Overview view

You can use the **Edit** (pencil) icon to open the Edit Letter Address window and enter the postal address to be used on letters. You can also use the **Edit** icon to modify the e-mail addresses that are displayed.

Once the letter and e-mail addresses are associated to organization using the **Organization Address Setup** link on the **Communication Configuration** view, the organization is available for use with multi-channel communications.



The image shows the "Overview" view of the "Organization Address Setup" window. The window has a navigation bar at the top with tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, Administration, Preferences, and Sign Out. The "Administration" tab is selected. Below the navigation bar is a "Setup Actions" bar with buttons: New, Refresh, Open, Copy, Delete, More Actions, and Close. The main content area is divided into two sections: "Letter Address" and "Email Address". The "Letter Address" section is currently empty. The "Email Address" section displays the following information:

Sender Account	Reply To Account
Account Name: Admissions Sender	Account Name: Admissions
Username: Admin2	Username: Admin
Email Address: Admissions@sungardhe.com	Email Address: Admissions@sungardhe.com

Steps

Follow these steps to set up an organization address.

1. Click the **Administration** tab.
2. Click the **Communication Configuration** link.
3. Click the **Organization Address Setup** link.
4. Click the **New** button on the Setup Actions toolbar.
5. Click the Look Up (☰) icon in the **Organization** field to select an organization from the list of available organizations.

Note that Organizations are not created here, and will need to be set up in the Organization functionality prior to adding them here. For more details, refer to the previous section in this workbook.



6. Click the Look Up (☰) icon in the **Sender Account** field to select a sender account from the list of available mailbox accounts.

Note that mailbox accounts are not created here, and will need to be set up in the Mailbox Account functionality prior to adding them here. For more details, refer to the previous lessons in this workbook.

7. Click the Look Up (☰) icon in the **Reply To Account** field to select a reply to account from the list of available mailbox accounts.
8. Enter the e-mail address that you want to use to send the e-mails from the selected organization.
9. Click the **Save** button.

Modifying an Organization Address

Introduction

You can use the **Edit** (pencil) icon to open the Edit Letter Address window and enter the postal address to be used on letters. You can also use the **Edit** icon to modify the e-mail addresses that are displayed.

Once the letter and e-mail addresses are associated to organization using the **Organization Address Setup** link on the **Communication Configuration** view, the organization is available for use with multi-channel communications.

Overview view

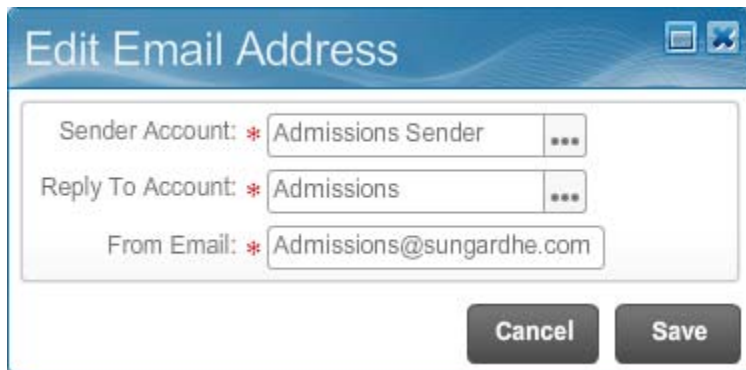
The screenshot shows a web application interface for managing organizations. At the top, there is a navigation bar with tabs: Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (which is currently selected). To the right of the tabs are links for Preferences and Sign Out. Below the navigation bar, the main content area is titled 'Admissions' and has a blue header. Under the header, there are two sections: 'Letter Address' and 'Email Address'. The 'Letter Address' section is currently empty. The 'Email Address' section displays two columns of information: 'Sender Account' and 'Reply To Account'. The 'Sender Account' column shows 'Account Name: Admissions Sender', 'Username: Admin2', and 'Email Address: Admissions@sungardhe.com'. The 'Reply To Account' column shows 'Account Name: Admissions', 'Username: Admin', and 'Email Address: Admissions@sungardhe.com'. On the left side of the main content area, there is a sidebar with a tab labeled 'Overview' and a blue arrow pointing to the right.

Edit Letter Address window



The 'Edit Letter Address' window features a blue header bar with the title and standard window controls. The main content area contains six text input fields arranged vertically, each with a label to its left: 'Street Line 1:', 'Street Line 2:', 'City:', 'State:', 'Zip / Postal Code:', and 'Nation:'. At the bottom right, there are two dark grey buttons labeled 'Cancel' and 'Save'.


Edit Email Address window



The 'Edit Email Address' window has a blue header bar with the title and window controls. The form contains three rows of input fields. The first row is 'Sender Account: *' with the value 'Admissions Sender' and a dropdown arrow. The second row is 'Reply To Account: *' with the value 'Admissions' and a dropdown arrow. The third row is 'From Email: *' with the value 'Admissions@sungardhe.com'. At the bottom right, there are two dark grey buttons labeled 'Cancel' and 'Save'.

Steps

Follow these steps to modify an organization address.

1. From the **Administration** Tab, click the **Communication Configuration** link.
2. Click the **Organization Address Setup** link
3. Double-click the name of the organization address you want to edit to open it.
4. Alternatively, click the name of the organization address you want to edit then click the **Open** button on the Setup Actions toolbar.
5. From the Overview window, click the **Edit** () icon next to the address category (letter address or e-mail address) that you wish to edit.
6. Edit the fields as needed.
7. Click the **Save** button to save the changes, or the **Cancel** button to exit without changes.