

Banner Enrollment Management Suite Relationship Management Prospects Workspace Training Workbook

*Release 1.4 – August 2010
Last updated 08/13/2010*



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Profile Manager Workspace



Workbook goal

The goal of this workbook is to provide you with an understanding of the features and functions of the Prospects workspace in Relationship Management.

Intended audience

Admissions Office, Students Services, and Recruiting staff.

Course objectives

After completing this course, you should understand and be able to utilize the various functions within the Prospects workspace.

Prospects tab

Introduction

The **Prospects** tab displays a collection of information about a selected prospect or applicant in the recruiting and admissions cycle. Information about a prospect can come from many sources, such as test scores, a college fair, or an inquiry from a high school student. As information is received, it is collected in a profile for recruiters to view and include in specific campaign activities.

As a recruiter, you can create lists of prospects for use in communications and campaigns. You can view and edit information about your constituents, such as their interests, contact information, and recruitment status. In addition, a recruiter can create lists of students for use in communications and campaigns designed to improve prospect communication.

Using the Prospects

Recruiters can obtain the most current information about their prospects. They can view the latest inquiries from the prospective students and respond immediately to those students who are in their particular region or geographic area.

Recruiters can create customized lists of prospects on-the-spot to enhance their campaign efforts. They can search the entire Banner database for prospects and applicants and get the latest information. Telephone numbers and e-mail addresses are a click away.

A prospect's interests, field of study, and curriculum are immediately available so that admissions counselors can target communications highlighting the university's offerings in those areas that match the prospect's interests. Using the data provided in the Prospect Overview, admissions counselors can gain additional insights regarding their pool of candidates.

Prior to spending time on the road, recruiters can use **Prospects** tab to discover information about the prospective students from the high schools that they will visit, including the names of students from the school who have contacted the institution prior to the visit. They can send the students an e-mail or make a phone call indicating that they will be at the school on a particular date and time.

In addition, recruiters can prepare follow-up correspondence for prospects they have met during the week, and enter specific interests, attributes, legacy information, and contact information for each of those prospects.

With Relationship Management, an up-to-date profile for each prospect is easy to locate and read. With accessible and updatable prospect information, recruiters can cultivate

prospective students into becoming applicants by making follow-up calls to selected contacts from recent road visits. If prospects are not available via phone, recruiters can send an e-mail which automatically updates the history of interactions with these prospects.

Whether on the road or in the office, the **Prospects** tab provides easily accessible and up to date profile information about each prospect. The information displayed in Relationship Management is coming from Banner, so there is no risk of asking for or entering duplicate information.

Finding information

The fastest way to get acquainted with Prospects tab is to begin with a prospect's profile and then explore the data that is displayed in all the windows for this prospect.

Conduct a Search for Prospects to access an individual's profile (for more information regarding the search and advanced search functions in Relationship Management, please refer to the Overview workbook).

1. Select Search for Prospects in the Prospects Workspace.


The screenshot displays the SunGard Relationship Management software interface. At the top, there is a navigation bar with tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications', and 'Administration'. The 'Prospects' tab is currently selected. Below the navigation bar, there is a 'Search for Prospects' window. This window contains several input fields for search criteria: 'Last Name', 'First Name', 'Banner ID', 'Email Address', 'Area Code', and 'Phone Number'. Each field has a small 'X' icon to its right. Below these fields is a 'More Attributes' drop-down menu. To the right of the search fields is a 'Clear' button and a 'Go' button. Below the search fields, there is a table with columns: 'Last Name', 'First Name', 'Gender', 'Birth Date', 'Level', 'Field of Study', 'Application Status', 'Application Detail', and 'Term'. The table is currently empty, with a message 'Displaying 0 rows.' below it. To the left of the search fields, there is a sidebar with links for 'Population Lists', 'Interactions', and 'Funnels'. To the right of the search fields, there is a 'Profile Summary' section. At the bottom of the interface, there is a footer with copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330)' and the SunGard Higher Education logo.

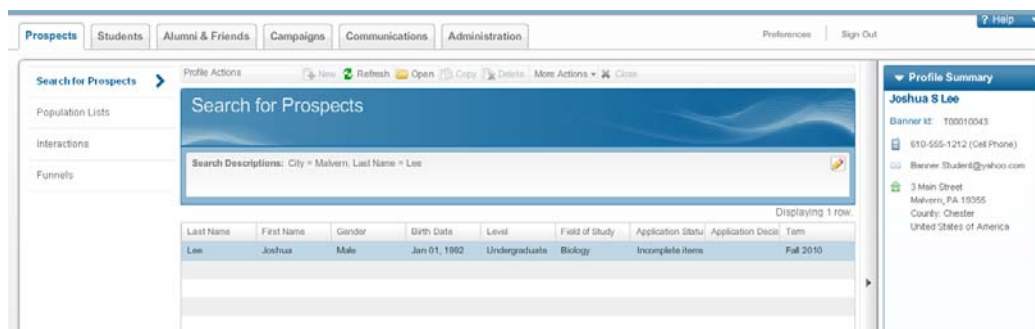
2. In the Last Name, First Name, Banner ID, Email Address, Area Code, and enter a the desired search criteria.
3. Click the More Attributes drop-down arrow and select additional search attributes to further refine your search.

Note: The Last Name field must be filled in before selecting attributes to further refine your search.

Note: Additional attributes consist of: City, Birth Date, Gender, Field of Study, Government ID, International Access, High School Name, Level, Nation, Prior

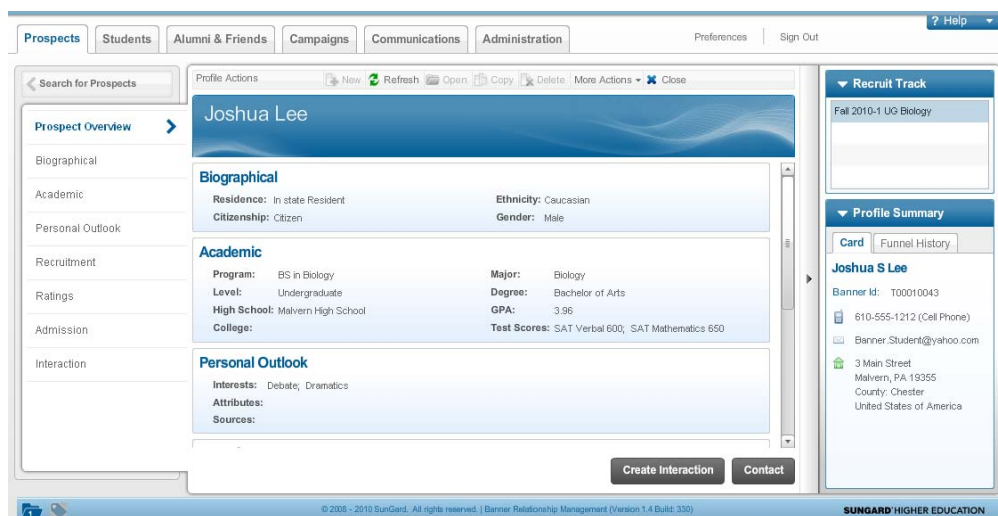
College Name, State, Term or Zip.

4. Click the  button or press Enter to display the search results.
5. When a list of names appears, you have fast access to telephone number, mailing address and email address in the Profile Summary panel on the right side of the window. Double-click any name to access more detailed information:



Now you can see the categories of data that are displayed.

- In the center of the screen, view the Prospect Overview. The navigation panes to the left contain the same headings as in the Prospect Overview.
- In the side panel to the right, view the Recruit Track, Profile Summary, and Funnel History for this particular prospective student.
- In the lower left, view a list of open items.



Recruit track

A Recruit track indicates the term, level and program in which an individual has indicated an interest or applied for admission. An applicant may apply to study more than one academic program, in which case they will have **multiple** Recruit tracks. While some prospect information remains the same regardless of which Recruit track is viewed, for example Biographical, Academic and Interaction, other information may vary between Recruit tracks, for example Prospect Overview, Personal Outlook, Recruitment and Admission details. Funnel status will also display for the Recruit track selected.

Under most circumstances, there is a one-to-one relationship between the Banner Recruit Record (SRBRECR) and the Banner Applicant Record (SARADAP). Therefore the information displayed in the Prospect Profile is the most current data drawn from these tables. Information from the Recruit Record, for example, 'recruit' sources and attributes, will continue to be displayed when 'admissions' sources and attributes are added when an application is received.

In the case of the term or level being different between the Recruit and Applicant records, then two Recruit tracks will be displayed.

In the case of more than one Applicant record existing, a Recruit Track will be displayed for each one, even if they are for the same term and level, as all Applications are tracked separately.

Profile Card

A profile card is a quick way to view commonly needed current information for an individual. You can think of it as an electronic business card. The information that is displayed on the card may include mailing address, e-mail, and telephone number, and other information depending on what is available in Banner.

Funnel History

Funnel history refers to the admissions funnel statuses for this prospect. In the funnel history sidebar, you can view the current status, past statuses, and dates of this individual's progression through the admissions funnel. Funnel status is tracked by PIDM, term, and level and there will be a different funnel status for each Recruit track.

Funnel Administration is covered in the Funnels Workbook.

Navigation Pane

More information regarding a profile is found by clicking on each option in the Navigation Pane. The options under Prospects Overview include: Biographical, Academic, Personal Outlook, Recruitment, Ratings, Admission, and Interaction.

Prospect Overview

Prospect Overview

The most current information for that individual will be displayed in a single, scrollable window called the **Prospect Overview**.

The screenshot shows a web application interface for managing prospects. At the top, there are tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns', 'Communications', and 'Administration'. Below these tabs is a search bar labeled 'Search for Prospects' and a 'Profile Actions' menu with options like 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. The main content area is titled 'Joshua Lee' and is divided into three sections: 'Biographical', 'Academic', and 'Personal Outlook'. The 'Biographical' section includes 'Residence: In state Resident', 'Citizenship: Citizen', 'Ethnicity: Caucasian', and 'Gender: Male'. The 'Academic' section includes 'Program: BS in Biology', 'Level: Undergraduate', 'High School: Malvern High School', 'College:', 'Major: Biology', 'Degree: Bachelor of Arts', 'GPA: 3.96', and 'Test Scores: SAT Verbal 600, SAT Mathematics 650'. The 'Personal Outlook' section includes 'Interests: Dramatics; Debate', 'Attributes:', and 'Sources:'. On the right side, there is a 'Recruit Track' section with a dropdown menu showing 'Fall 2010-1 UG Biology' and a 'Profile Summary' section with a 'Card' tab and a 'Funnel History' tab. The 'Card' tab shows 'Joshua S Lee', 'Banner Id: T00010043', '610-555-1212 (Cell Phone)', 'Banner.Student@yahoo.com', '3 Main Street', 'Malvern, PA 19355', 'County: Chester', and 'United States of America'. At the bottom right, there are 'Create Interaction' and 'Contact' buttons.

Biographical	
Residence:	In state Resident
Citizenship:	Citizen
Ethnicity:	Caucasian
Gender:	Male

Academic	
Program:	BS in Biology
Level:	Undergraduate
High School:	Malvern High School
College:	
Major:	Biology
Degree:	Bachelor of Arts
GPA:	3.96
Test Scores:	SAT Verbal 600, SAT Mathematics 650

Personal Outlook	
Interests:	Dramatics; Debate
Attributes:	
Sources:	

The Prospect Overview is read-only. To add or edit information, click on a topic in the navigation pane to go to the appropriate update window.

Information in the Prospect Overview is organized from top to bottom in the same order as the list of topics in the navigation pane on the side:

- **Biographical** – View Residence, Ethnicity, New Ethnicity, Citizenship, and Gender
- **Academic** - View Program, Major, Level, Degree, High School, GPA, College, and Test Scores
- **Personal Outlook** - View Interests, Attributes, and Sources
- **Recruitment** - View Recruit Type, Student Type, Recruit Status, Geo Region, and Recruiter
- **Ratings** – View applicant probability and Desirability information
- **Admission** View Application Status, Current Decision, Decision Date, and Check List Items
- **Interaction** - View Interaction History, Interaction Types and Dates, Create Interaction to record an interaction with this prospect, Contact to contact this prospect

In the right-hand side pane next to the Prospect Overview, you can view the individual's Recruit Track, Profile Summary Card and Funnel History. These windows can be expanded or collapsed by clicking the arrows on the title bars. If you navigate to another Recruit Track, the Prospect Overview will display the information associated with the new Recruit Track.

The **Create Interaction** button on the Prospect Overview page allows you record an interaction between the institution and the prospect. The **Contact** button allows you to send an e-mail, letter or targeted announcement to the prospect. (These functions will be covered in more detail later in the Workbook)

Biographical Information

Prospect Biographical Information includes **Bio Data** and **Contact Information** for an individual.

Bio Data Tab

Bio Data includes Nickname, Gender, Date of Birth, Age, Marital Status, Religion, Legacy, Citizenship, and Ethnicity, and New Ethnicity which are displayed on the **Bio Data** tab. You may enter or change Biographical Information.

The list of values available for Marital Status, Religion, Legacy, Citizenship, Ethnicity, New Ethnicity, Address Type, Telephone Type, and E-mail Address Type display the values that have been defined in the associated Banner validation forms. Changes made here will also update in Banner and vice versa.

The screenshot displays the SunGard Banner Relationship Management interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Joshua Lee" and features two tabs: "Bio Data" (selected) and "Contact Information". The "Bio Data" tab shows a "Details" section with the following information:

Preferred Name:	Josh	Gender:	Male
Date of Birth:	Jan 01, 1992	Age:	18
Marital Status:	Single	Religion:	
Legacy:		Citizenship:	Citizen
Ethnicity:	Caucasian	Race:	
New Ethnicity:	Not Hispanic or Latino		

Below the details section, it states "Ethnicity and Race confirmed". To the right of the main content area, there is a "Recruit Track" section showing "Fall 2010-1 UG Biology" and a "Profile Summary" section for "Joshua S Lee" with the following details:

- Banner Id: T00010043
- 610-555-1212 (Cell Phone)
- Banner.Student@yahoo.com
- 3 Main Street, Malvern, PA 19355
- County: Chester, United States of America

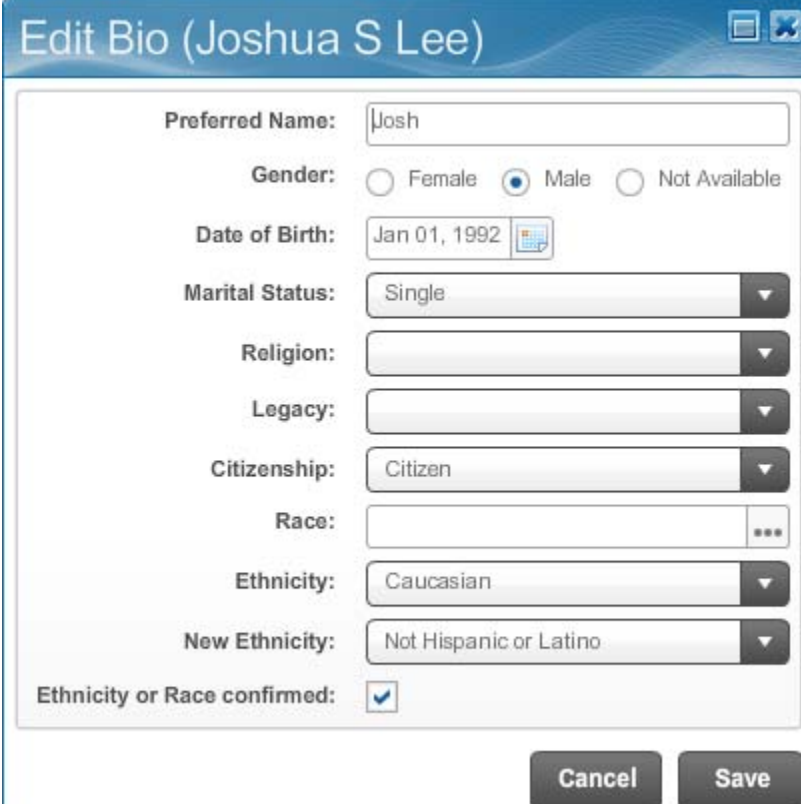
At the bottom of the interface, there are buttons for "Create Interaction" and "Contact". The footer includes the copyright notice "© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330)" and the "SUNGARD HIGHER EDUCATION" logo.

Steps

Steps to follow to view and edit Biographical Information for a prospect:

1. Select the **Biographical** option in the left pane.
2. Click the **Edit** (✎) icon in the Details pane of the Bio Data tab.



This window will display when you click the **Edit** icon. You may change or add to the information that is displayed in this window.

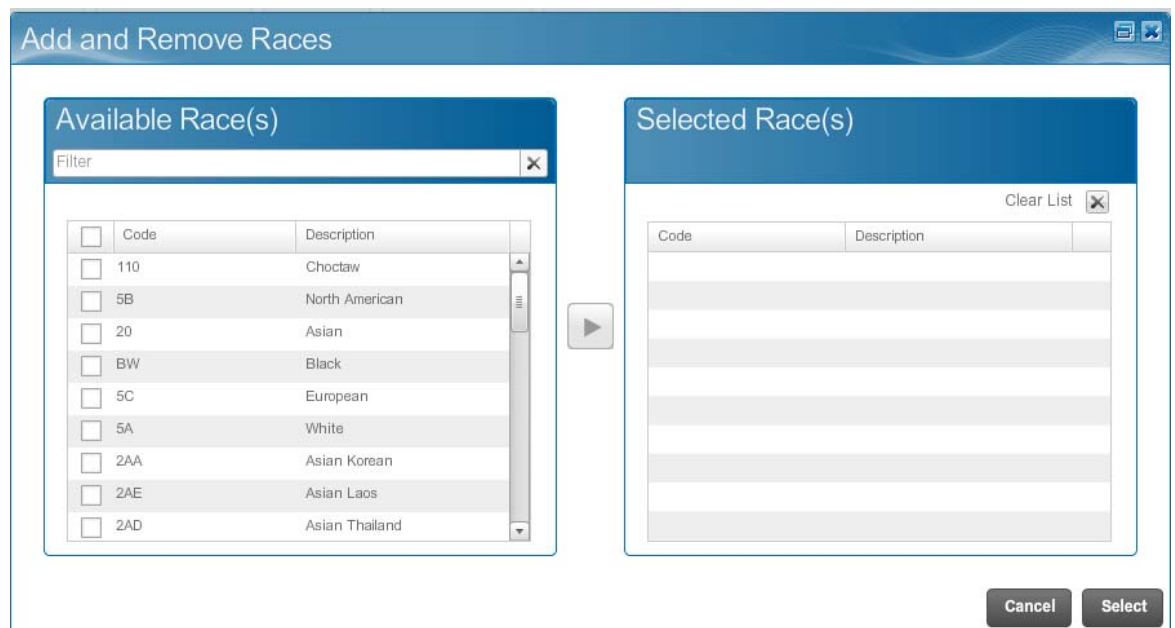


The screenshot shows a window titled "Edit Bio (Joshua S Lee)". The window contains the following fields and controls:



- Preferred Name:** A text input field containing "Josh".
- Gender:** Three radio buttons labeled "Female", "Male" (selected), and "Not Available".
- Date of Birth:** A date picker showing "Jan 01, 1992" with a calendar icon.
- Marital Status:** A dropdown menu showing "Single".
- Religion:** A dropdown menu.
- Legacy:** A dropdown menu.
- Citizenship:** A dropdown menu showing "Citizen".
- Race:** A text input field with a "..." button.
- Ethnicity:** A dropdown menu showing "Caucasian".
- New Ethnicity:** A dropdown menu showing "Not Hispanic or Latino".
- Ethnicity or Race confirmed:** A checkbox that is checked.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

3. Enter the prospect's nickname in the **Preferred Name** field.
4. Select the appropriate radio button for **Gender**.
5. Use the calendar to enter **Date of Birth**.

6. Click the dropdown arrow  to select from a list of options available to edit the remaining fields: (These options are coming from values created in Banner)
- Marital Status
 - Religion
 - Legacy
 - Citizenship
 - Ethnicity
 - New Ethnicity
7. Click the **Look Up**  icon in the **Race** field.
8. Select the race(s) you want to add, then click the arrow icon to move the selected item(s) to the Selected Race(s) area.



Code	Description
<input type="checkbox"/> 110	Choctaw
<input type="checkbox"/> 5B	North American
<input type="checkbox"/> 20	Asian
<input type="checkbox"/> BW	Black
<input type="checkbox"/> 5C	European
<input type="checkbox"/> 5A	White
<input type="checkbox"/> 2AA	Asian Korean
<input type="checkbox"/> 2AE	Asian Laos
<input type="checkbox"/> 2AD	Asian Thailand

9. If desired, select an existing race and click the delete icon () to remove it.
10. Click  to add the selected race(s) to the profile.
11. Click the **Save** button.

Contact Information Tab

Contact Information includes the Address, Telephone, and E-mail details for communicating with an individual. You can add, update, and delete this data.

If you get an unspecified database violation error when attempting to update any contact information, it means that another person is also updating contact information for this individual at the same time. Do not click Refresh on the toolbar. Simply click OK in the error message box and then press CANCEL in the edit window. Click close and re-open the Prospect Overview window. Go to the Biographical page, Contact Information tab, and you will see the edits made by the other user.

Note: You cannot update the Address **type** field for an existing address. You may edit an existing address and add a new address or multiple addresses at the same time. Only active address types in Banner display in the Profile. Telephone numbers and email addresses that are designated "Primary" will display "Primary" following the item.

The screenshot displays the 'Prospect Overview' window for 'Joshua Lee'. The 'Contact Information' tab is active, showing fields for Address, Telephone, E-Mail, and Instant Message. The Address field includes 'Mailing' and 'Parent 1' information. The Telephone field shows a 'Cell Phone' number. The E-Mail field shows a 'Personal' email address. The Instant Message field is empty. On the right side, there is a 'Recruit Track' section showing 'Fall 2010-1 UG Biology' and a 'Profile Summary' section showing 'Joshua S Lee' with his Banner ID, phone number, email, and address. The bottom of the window has 'Create Interaction' and 'Contact' buttons.

Prospect Overview

Biographical

Academic

Personal Outlook

Recruitment

Ratings

Admission

Interaction

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

Joshua Lee

Bio Data | Contact Information

Address

Mailing: 3 Main Street
Malvern, PA 19355
County: Chester
United States of America
(Effective Jun 21, 2009)

Parent 1: 123 Elm Street
Malvern, PA 19355
(Effective Jun 29, 2010)

Telephone

Cell Phone: 610-555-1212 (Primary)

[] denotes International Access number

E-Mail

Personal: Banner.Student@yahoo.com (Primary)

Instant Message

Create Interaction | Contact

Recruit Track

Fall 2010-1 UG Biology

Profile Summary

Card | Funnel History

Joshua S Lee

Banner Id: T00010043

610-555-1212 (Cell Phone)

Banner.Student@yahoo.com

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

Add or Edit Contact Information

1. Select the **Contact Information** tab.

The screenshot shows a web application interface with a blue header bar containing two tabs: "Bio Data" and "Contact Information". The "Contact Information" tab is selected. Below the tabs, there are four sections: "Address", "Telephone", "E-Mail", and "Instant Message". Each section has a pencil icon in the top right corner. The "Address" section contains two entries: "Mailing" and "Parent 1". The "Telephone" section contains a "Cell Phone" entry. The "E-Mail" section contains a "Personal" entry. The "Instant Message" section is empty. At the bottom right of the form, there are two buttons: "Create Interaction" and "Contact".

Bio Data **Contact Information**

Address

Mailing: 3 Main Street
Malvern, PA 19355
County: Chester
United States of America
(Effective Jun 21, 2009)

Parent 1: 123 Elm Street
Malvern, PA 19355
(Effective Jun 29, 2010)

Telephone

Cell Phone: 610-555-1212 (Primary)


[] denotes International Access number

E-Mail

Personal: Banner.Student@yahoo.com (Primary)

Instant Message

Create Interaction Contact

2. Click the Edit  icon in the Address pane to open the **Edit Address** window.

The screenshot shows a window titled "Edit Address (Joshua S Lee)". It contains a table with four columns: "Type", "Address", "Effective From", and "Effective To". There are two rows of data: "Mailing" and "Parent 1". The "Mailing" row has a red circle with the letter "B" next to the "Type" column and a red circle with the letter "C" next to the "Effective To" column. The "Parent 1" row has a red circle with the letter "A" next to the "Effective To" column. Below the table, there are three buttons: "Cancel", "Add Address", and "Save".


Edit Address (Joshua S Lee)

Type	Address	Effective From	Effective To
Mailing	3 Main Street Malvern, PA 19355 County: Chester United States of America	Jun 21, 2009	
Parent 1	123 Elm Street Malvern, PA 19355	Jun 29, 2010	

Cancel Add Address Save

A To add an address, click the **Add Address** button.

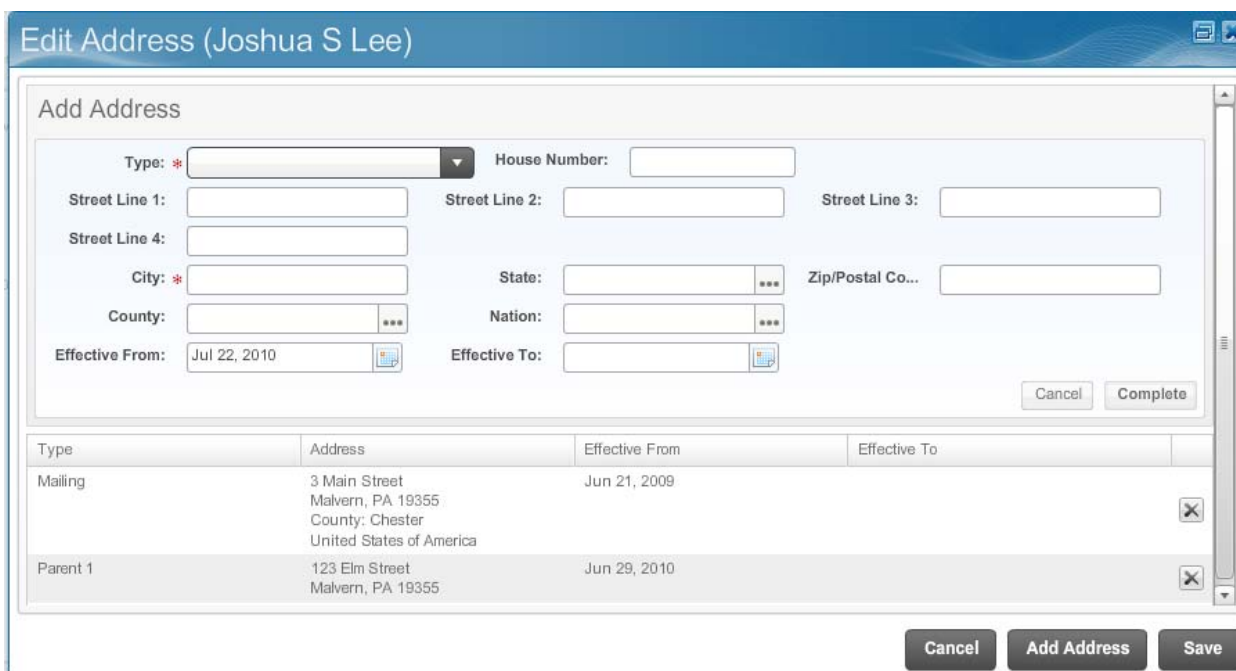
3. **B** To edit an address, move the mouse over the address to highlight, and then click on the address. This opens the editing window.

4. **C** To delete an address, click the **Delete** icon. .

5. **D** If you delete in error, click the **Cancel** button.

6. **E** Use the **Save** button to save any changes.

After selecting either **Add Address** or clicking on the address itself, the editing window opens.



Type	Address	Effective From	Effective To
Mailing	3 Main Street Malvern, PA 19355 County: Chester United States of America	Jun 21, 2009	
Parent 1	123 Elm Street Malvern, PA 19355	Jun 29, 2010	

This window is divided into two parts. The top portion of the window is the editing window. The bottom portion is the view.

Use the editing buttons to save/complete or cancel in the edit window.

Cancel


Complete

while working

Add an Address

1. Click the **Add Address** button at the bottom of the window.
2. Enter address information in the **Type**, **Street Line1**, **City**, **State**, **Zip/Postal Code** and **Nation** fields. Any fields marked with a red asterisk * are required fields.
3. You may also enter **Effective From**: and **Effective To**: dates as needed. These fields restrict the valid time periods for the address, which is useful for temporary addresses such as summer addresses.

Note: You cannot edit the **Type** field once you have saved the address record.

4. Click the **Complete** button.  The address shows in the lower window to indicate the change has been applied.
5. Click the **Save** button.

Edit an Address

1. Double-click on an existing address entry in the bottom half of the Edit Address screen.
2. The information will auto populate in the fields and "Update Selected Address" will indicate that you are updating an existing entry.

Update Selected Address

Type: * Mailing House Number:

Street Line 1: 3 Main Street Street Line 2: Street Line 3:

Street Line 4:

City: * Malvern State: Pennsylvania (PA) Zip/Postal Co... * 19355

County: Chester (001) Nation: United States of America (1)

Effective From: Jun 21, 2009 Effective To:




Cancel Complete

Type	Address	Effective From	Effective To
Mailing	3 Main Street Malvern, PA 19355 County: Chester United States of America	Jun 21, 2009	
Parent 1	123 Elm Street Malvern, PA 19355	Jun 29, 2010	


Cancel Add Address Save

3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an Address

1. Click the **Delete**  icon at the end of the row for the address to be deleted.
2. Click  to keep the change. Click  to abort the deletion.

Telephone Numbers

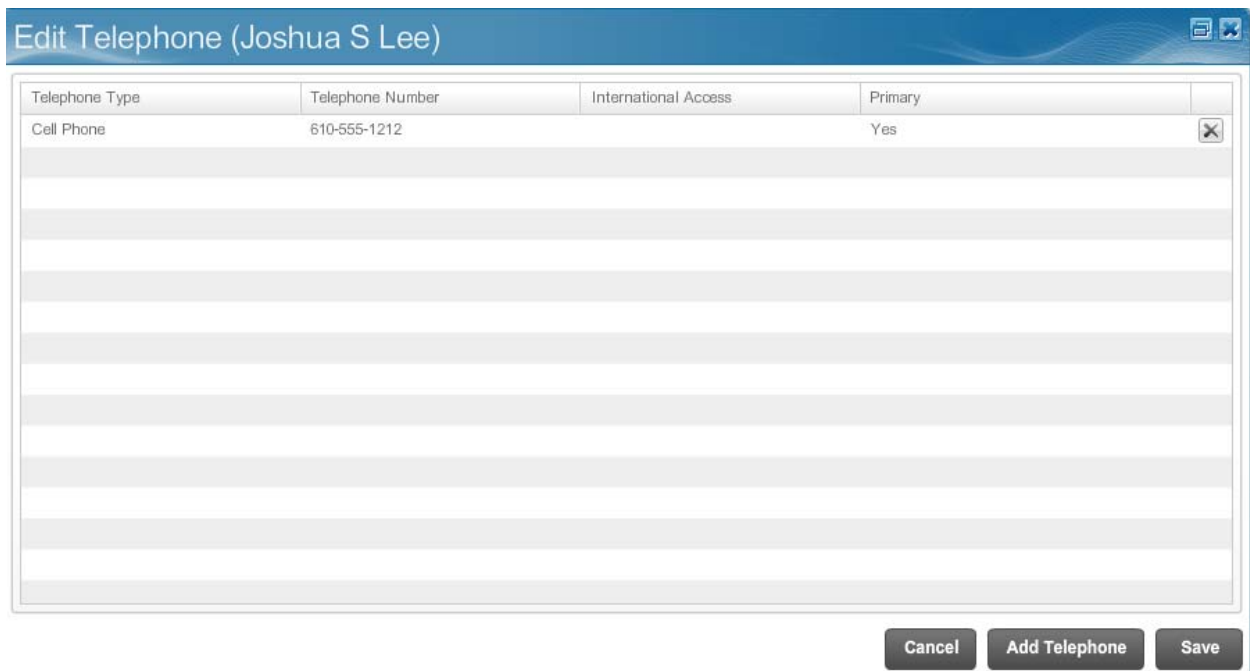
To add or edit Telephone Numbers, click the **Edit**  icon in the **Telephone** section.



The screenshot shows a 'Contact Information' form with four sections: Address, Telephone, E-Mail, and Instant Message. Each section has an edit icon (pencil) in the top right corner. The 'Telephone' section is highlighted with a red border. Below the form are two buttons: 'Create Interaction' and 'Contact'.

Section	Details
Address	Mailing: 3 Main Street Malvern, PA 19355 County: Chester United States of America (Effective Jun 21, 2009) Parent 1: 123 Elm Street Malvern, PA 19355 (Effective Jun 29, 2010)
Telephone	Cell Phone: 610-555-1212 (Primary) [] denotes International Access number
E-Mail	Personal: Banner.Student@yahoo.com (Primary)
Instant Message	

This opens the Edit Telephone window.




The 'Edit Telephone (Joshua S Lee)' window displays a table with the following data:

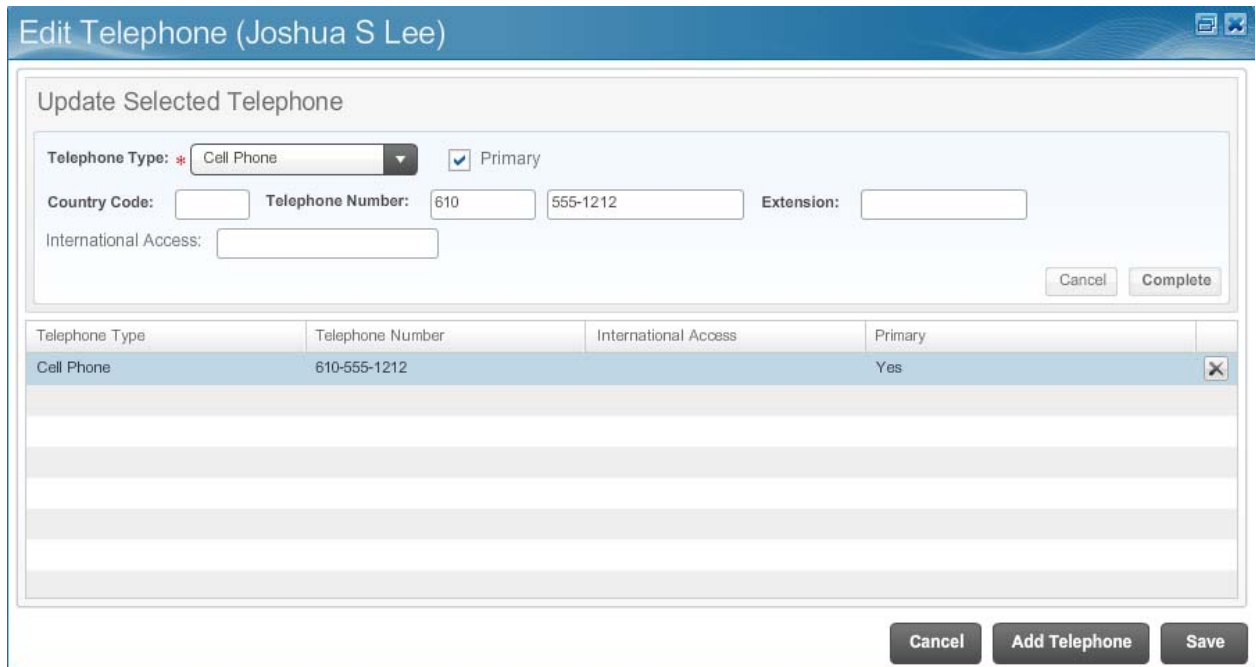
Telephone Type	Telephone Number	International Access	Primary
Cell Phone	610-555-1212		Yes

At the bottom of the window are three buttons: 'Cancel', 'Add Telephone', and 'Save'.

The concept for adding and editing a telephone number is the same as for an address:

1. To add a telephone number, click the **Add Telephone** button.
2. To edit a telephone number, move the mouse over the telephone number to highlight, and then click on the telephone number.
3. To delete a telephone number, click the delete icon. .
4. If you delete in error, click the Cancel button.
5. Use the **Save** button to save any changes.

After selecting either **Add Telephone** or clicking on an item in the list, the editing window opens.




Edit Telephone (Joshua S Lee)

Update Selected Telephone

Telephone Type: * Cell Phone ☒ Primary

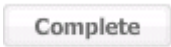
Country Code: Telephone Number: 610 555-1212 Extension: International Access:

Cancel Complete

Telephone Type	Telephone Number	International Access	Primary	
Cell Phone	610-555-1212		Yes	

Cancel Add Telephone Save

Add a telephone number




1. Click the **Add Telephone** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button.  The telephone number will show in the lower window to signify the change has been applied.

4. Click the **Save** button


Edit a phone number

1. Double-click on an existing telephone number entry in the bottom half of the Edit Telephone number screen.
2. The information will auto populate in the fields and **Update Selected Telephone** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete a Telephone Number

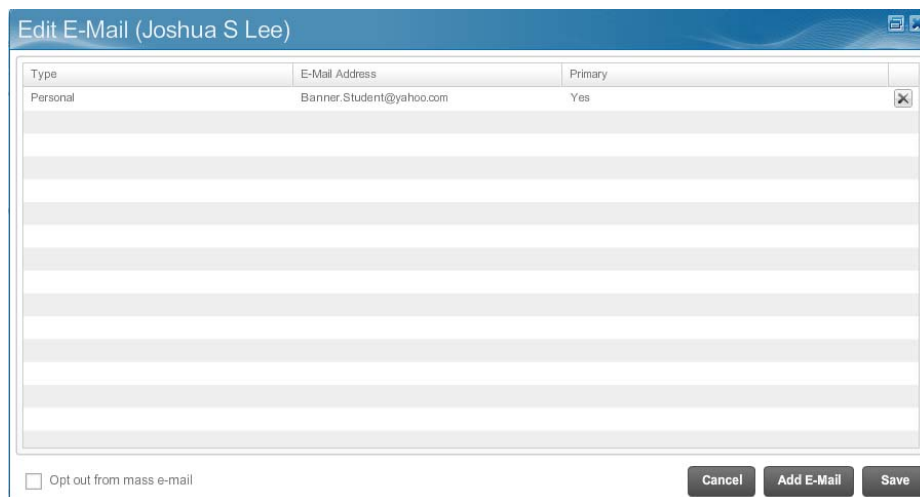
1. Click the **Delete**  icon at the end of the row for the telephone number to be deleted.
2. Click  to keep the change. Click  to abort the deletion.

Email Information

1. Click the **Edit** () icon in the E-Mail window.



2. The Edit E-Mail window opens.




Type	E-Mail Address	Primary
Personal	Banner.Student@yahoo.com	Yes

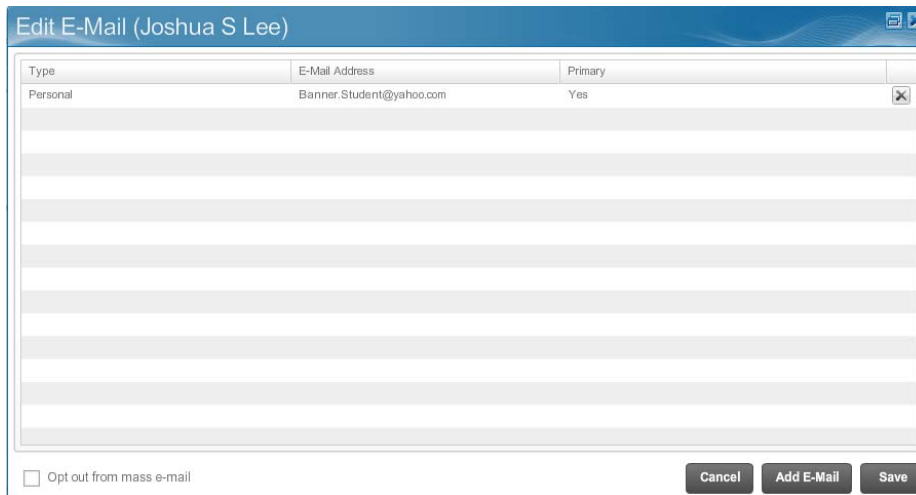
☐ Opt out from mass e-mail

Cancel Add E-Mail Save

The concept for adding and editing an e-mail is the same as for an address:

1. To add an e-mail, click the **Add E-Mail** button.
2. To edit an e-mail, move the mouse over the e-mail to highlight, and then click on the e-mail.
3. To delete an e-mail, click the **Delete** icon. .
4. If you delete in error, click the **Cancel** button.
5. Use the **Save** button to save any changes.

After selecting either **Add E-mail** or clicking on an item in the list, the editing window opens.




Type	E-Mail Address	Primary
Personal	Banner.Student@yahoo.com	Yes

☐ Opt out from mass e-mail

Cancel Add E-Mail Save




Add an email

1. Click the **Add E-Mail** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button.  The e-mail will show in the lower window to signify the change has been applied.
4. Click the **Save** button

Edit an E-mail

1. Double-click on an existing e-mail entry in the bottom half of the Edit E-mail screen.
2. The information will auto populate in the fields and **Update Selected E-Mail** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an E-Mail

1. Click the **Delete**  icon at the end of the row for the e-mail to be deleted.
2. Click  to save the change. Click  to cancel the deletion.

Opt out from Mass E-mail

Individuals who do not want to receive mass e-mails from the institution can indicate this preference.


The “Opt out from mass e-mail” setting is located at the bottom of the Edit E-Mail window.


☐ Opt out from mass e-mail

Cancel

Add E-Mail

Save

- To activate, check the box and click .

- To deactivate: Uncheck the box and click .

This setting does not prevent a recruiter from sending a personalized e-mail to the person.

Instant Message Information

1. Click the **Edit** () icon in the **Instant Message** section to add or edit instant messaging information.

Instant Message




2. The Edit Instant Message window will display.

Edit Instant Message (Joshua S Lee)

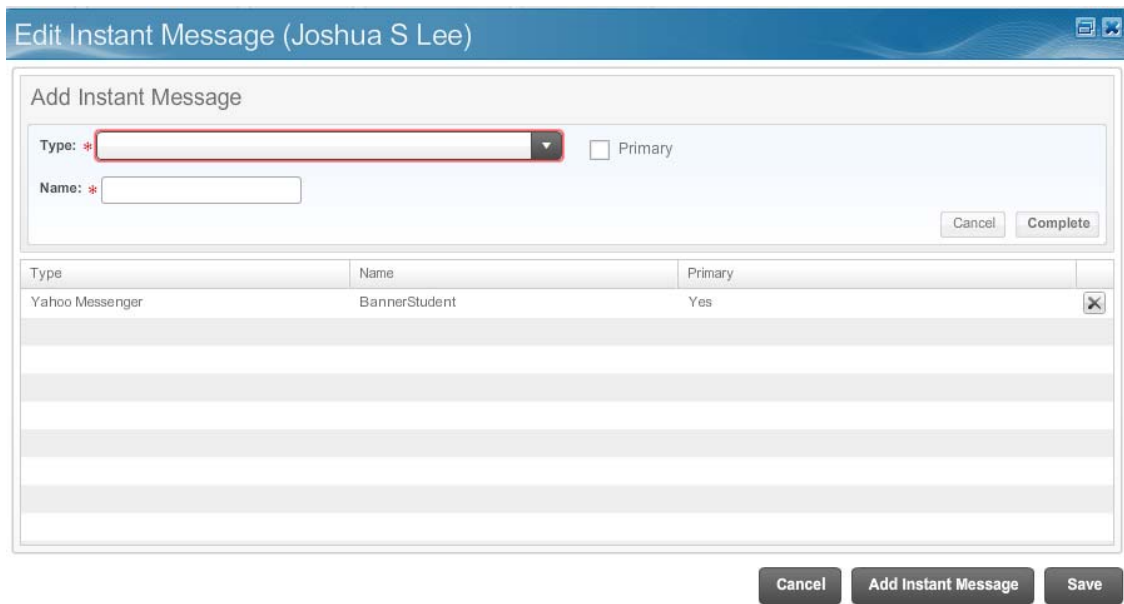
Type	Name	Primary
Yahoo Messenger	BannerStudent	Yes

Cancel Add Instant Message Save

The concept for adding and editing an instant message is the same as for an address:

1. To add an instant message address, click the **Add Instant Message** button.
2. To edit an instant message address, move the mouse over the instant message to highlight, and then click on the instant message.
3. To delete an instant message address, click the **Delete** icon. .
4. If you delete in error, click the **Cancel** button.
5. Use the **Save** button to save any changes.

After selecting either **Add Instant Message** or clicking on an item in the list, the editing window opens.



Edit Instant Message (Joshua S Lee)

Add Instant Message

Type: * ☐ Primary


Name: *

Cancel Complete

Type	Name	Primary
Yahoo Messenger	BannerStudent	Yes

Cancel Add Instant Message Save




Add an Instant Message

1. Click the **Add Instant Message** button at the bottom of the window.
2. Enter the required information in the editing screen. Any fields marked with a red asterisk * are required fields.
3. Click the **Complete** button.  The information will show in the lower window to signify the change has been applied.
4. Click the **Save** button.

Edit an Instant Message

1. Double-click on an existing instant message entry in the bottom half of the Edit Instant message screen.
2. The information will auto populate in the fields and **Update Selected Instant Message** will indicate that you are updating an existing entry.
3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click **Save** at the bottom of the screen to exit the popup window.

Delete an Instant Message

1. Click the **Delete**  icon at the end of the row for the instant message to be deleted.
2. Click  to keep the change. Click  to cancel the deletion.

Note: In the current release of Relationship Management, Instant Message addresses may be saved but sending and receiving of Instant Messages is not currently available.

Academic Information

Introduction

Prospect Academic Information includes Credentials and Curricula information for an individual. This information is view-only in Relationship Management; any changes or updates must be entered directly into Banner.

Credentials are the prospect's qualifications related to test scores, academic credentials from their high school, and any prior college experience. This view helps you build a picture of the individual's academic performance and strengths.

Academic curricula include the courses of study in which an individual has expressed interest, the admit term, and degree sought. If the individual has applied for more than one course of study, a priority number will indicate the first and second choice.

Credentials View

In the Academic area of the profile, the prospect's qualifications related to test scores, academic credentials from high school, and any prior college experience are displayed. This view helps you build a picture of the individual's academic performance and strengths. This information is view-only.

The screenshot displays the SunGard Relationship Management - Prospects interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Joshua S Lee" and shows the "Credentials" tab selected. The "Test Scores" section displays SAT Mathematics (Score: 650, Test Date: Mar 15, 2010, Source: Self-reported, Received: Jun 21, 2010) and SAT Verbal (Score: 600, Test Date: Mar 15, 2010, Source: Self-reported, Received: Jun 21, 2010). The "Secondary Education (High School)" section shows Malvern High School with GPA: 3.96, Class Rank: 51/500, Percentile: 90, Transcript Received: Jun 22, 2010, and Graduation Date: Jun 10, 2010. The "Post Secondary Education (College)" section is currently empty. The right sidebar shows the "Recruit Track" and "Profile Summary" for Joshua S Lee, including Banner ID: T00010043, contact information, and address.

Test Scores			
SAT Mathematics	Score: 650	Test Date: Mar 15, 2010	Source: Self-reported
SAT Verbal	Score: 600	Test Date: Mar 15, 2010	Source: Self-reported

Secondary Education (High School)	
Malvern High School	
GPA: 3.96	Transcript Received: Jun 22, 2010
Class Rank: 51/500	Graduation Date: Jun 10, 2010
Percentile: 90	

Post Secondary Education (College)	

The Academic Credentials page contains the following fields:

- **Test Scores** - Information displayed in Test Scores includes test name, date received, score, and test date. The specific test scores that are displayed are controlled by institution specific configuration in the Banner Integration Configuration Settings form (GORICCR).
- **Secondary Education (High School)** - View High School information.
- **Post Secondary Education (College)** - View prior College information.

Curricula view

Academic Curricula includes the courses of study in which an individual has expressed interest, the admit term, and degree sought. The admit term for the course of study is displayed in the Recruit Track sidebar panel. If the individual has applied for more than one course of study for the same term and level, a priority number will indicate the first and second choice. The fields of study (major, minor, concentration) are displayed in priority order for each curriculum. This information is view-only.

The screenshot displays the SunGard Relationship Management - Prospects interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Joshua Lee" and features a "Curricula" tab. Below this tab is a table with columns: Priority Number, Program, Level, Campus, College, and Degree. The table contains one row with the following data: Priority Number: 1, Program: BS-BIOLOGY, Level: Undergraduate, Campus: College of Arts Scier, Degree: Bachelor of Arts. Below the table is a "Field of Study" section for "Biology", showing "Priority Number: 1" and "Type: Major". To the right of the main content area is a sidebar with two panels: "Recruit Track" and "Profile Summary". The "Recruit Track" panel shows "Fall 2010-1 UG Biology". The "Profile Summary" panel shows "Joshua S Lee" with contact information: Banner Id: T00010043, 610-555-1212 (Cell Phone), 610-555-1212 (Parent 1), Banner.Student@yahoo.com, 3 Main Street, Malvern, PA 19355, County: Chester, United States of America. At the bottom of the main content area are two buttons: "Create Interaction" and "Contact".

Priority Number	Program	Level	Campus	College	Degree
1	BS-BIOLOGY	Undergraduate		College of Arts Scier	Bachelor of Arts

Field of Study
Biology
Priority Number: 1
Type: Major
Department: Biology

Recruit Track
Fall 2010-1 UG Biology

Profile Summary
Joshua S Lee
Banner Id: T00010043
610-555-1212 (Cell Phone)
610-555-1212 (Parent 1)
Banner.Student@yahoo.com
3 Main Street
Malvern, PA 19355
County: Chester
United States of America

The Academic Curricula page contains the following view-only fields and buttons.

- **Priority Number** - Displays the priority number for this curriculum. This number is required by Banner.
- **Program** - Displays the program the individual has chosen.
- **Level** - Displays the level of study for this application or recruit record.
- **Campus** - Displays the campus to which this curriculum belongs.
- **College** - Displays the college to which this curriculum belongs.
- **Degree** - Displays the degree the student is seeking.
- **Field of Study** - Displays the field of study (major, minor, or concentration) the individual has chosen, including the priority number, type, and department.

Personal Outlook Information

Introduction

The Personal Outlook information in the Prospect Overview indicates the extracurricular interests, attributes, and sources that are known about the prospect. This information helps institutions to build relationships with prospects and target them with relevant recruiting campaign activities. A recruiter can view, add, or delete interests, attributes and sources.

Additions of new **Attribute** information will populate the most current and appropriate Banner table. For example, if an attribute is added for an applicant, the Admissions Attribute table will be updated (and not the Recruiting Attribute table, which would be populated for a prospect).


The **Source** information is the manner in which the prospect became interested in attending the institution.

The screenshot displays the Prospect Overview page for Joshua Lee. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. A left sidebar contains a search bar and a list of navigation links: Prospect Overview, Biographical, Academic, Personal Outlook (selected), Recruitment, Ratings, Admission, and Interaction. The main content area is titled 'Joshua Lee' and features a 'Profile Actions' bar with buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. Below this, the 'Personal Outlook' section is expanded, showing three sub-sections: Interests (with 'Debate' and 'Dramatics'), Attributes, and Sources. Each sub-section has a pencil icon for editing. At the bottom of the main content area are 'Create Interaction' and 'Contact' buttons. On the right side, there is a 'Recruit Track' section showing 'Fall 2010-1 UG Biology' and a 'Profile Summary' section for Joshua S Lee, which includes contact information such as phone numbers, email, and address.

Interests

Profile interests are areas in which a person has indicated involvement or curiosity, such as a club, sport, skill, hobby, pastime, or extracurricular activity. Interests can be added to the profile by the recruiter. This information is used to personalize future interactions.

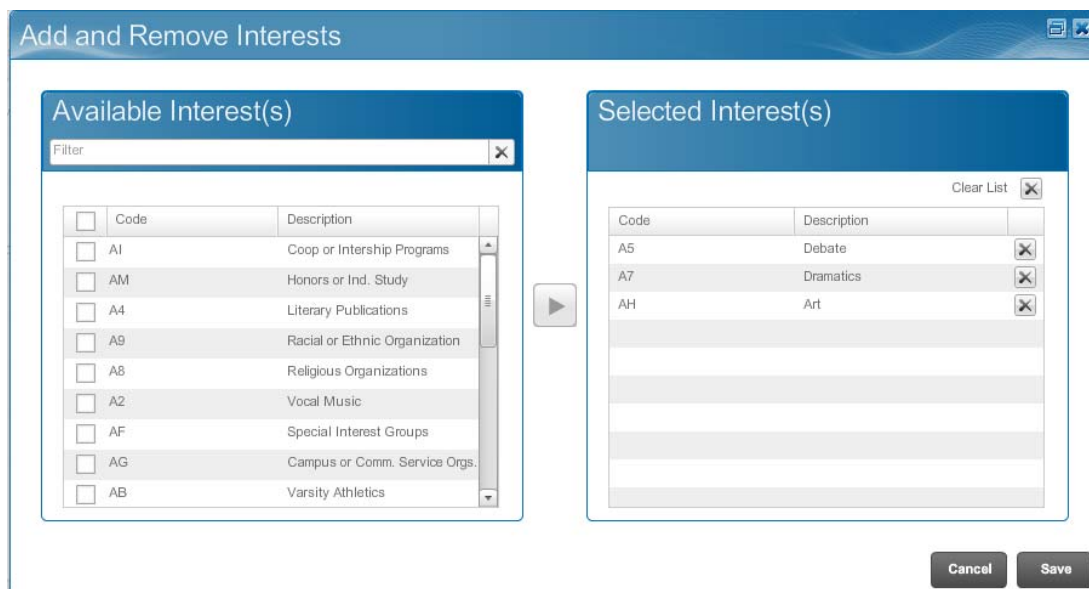
To add or edit a profile interest:

1. In the **Interests** section of the page, click **Edit**  to open the Edit window.



The image shows a section titled "Interests" with a blue header. Below the header, there are two interest categories listed: "Debate" and "Dramatics". In the top right corner of the section, there is an "Edit" button with a pencil icon.



2. Select the interest you want to add, then click the arrow icon to move the selected item(s) to the Selected Interest(s) area.



The image shows a window titled "Add and Remove Interests". It contains two main panels: "Available Interest(s)" on the left and "Selected Interest(s)" on the right. The "Available Interest(s)" panel has a search filter and a list of interests with checkboxes. The "Selected Interest(s)" panel has a "Clear List" button and a list of selected interests with delete icons. A play button (arrow) is located between the two panels. At the bottom right, there are "Cancel" and "Save" buttons.

Code	Description
<input type="checkbox"/> AI	Coop or Internship Programs
<input type="checkbox"/> AM	Honors or Ind. Study
<input type="checkbox"/> A4	Literary Publications
<input type="checkbox"/> A9	Racial or Ethnic Organization
<input type="checkbox"/> A8	Religious Organizations
<input type="checkbox"/> A2	Vocal Music
<input type="checkbox"/> AF	Special Interest Groups
<input type="checkbox"/> AG	Campus or Comm. Service Orgs.
<input type="checkbox"/> AB	Varsity Athletics


Code	Description
A5	Debate
A7	Dramatics
AH	Art

3. If desired, select an existing interest and click the delete icon () to remove it.
4. Click  to add the selected interests to the profile.

Attributes

Attributes are characteristics or qualities that your institution has selected to help you search for or identify one or more individuals. Attributes can be added and deleted.


To add or edit an Attribute:

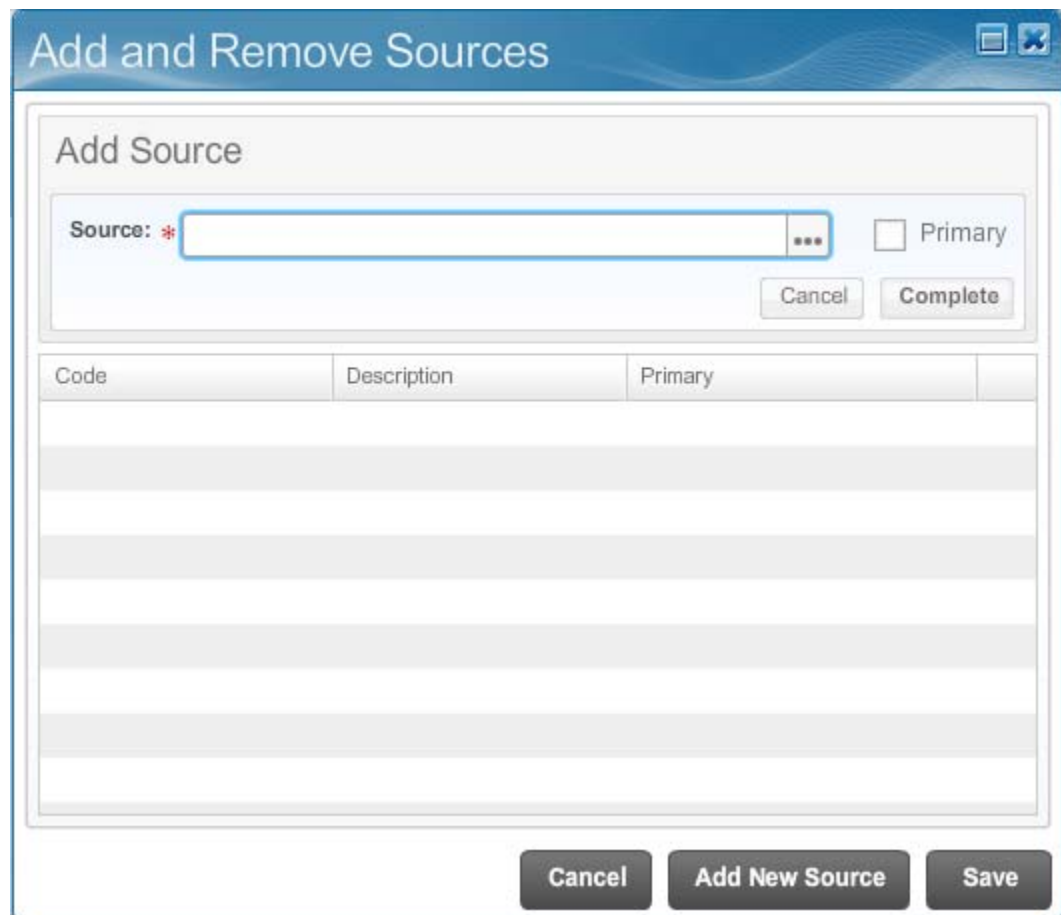
- In the **Attributes** section of the page, click **Edit**  to open the Edit window.
- Follow the same steps as in **Interests**.

Sources

Prospect Sources indicate the manner in which the prospect became interested in attending the institution. The most important source can be marked as Primary. Sources can be viewed and updated on the Personal Outlook page in the Profile Overview.

To add or edit a Source:

1. In the **Source** section of the page, click **Edit**  to open the Edit window.
2. To add an attribute, click the **Add New Source** button.



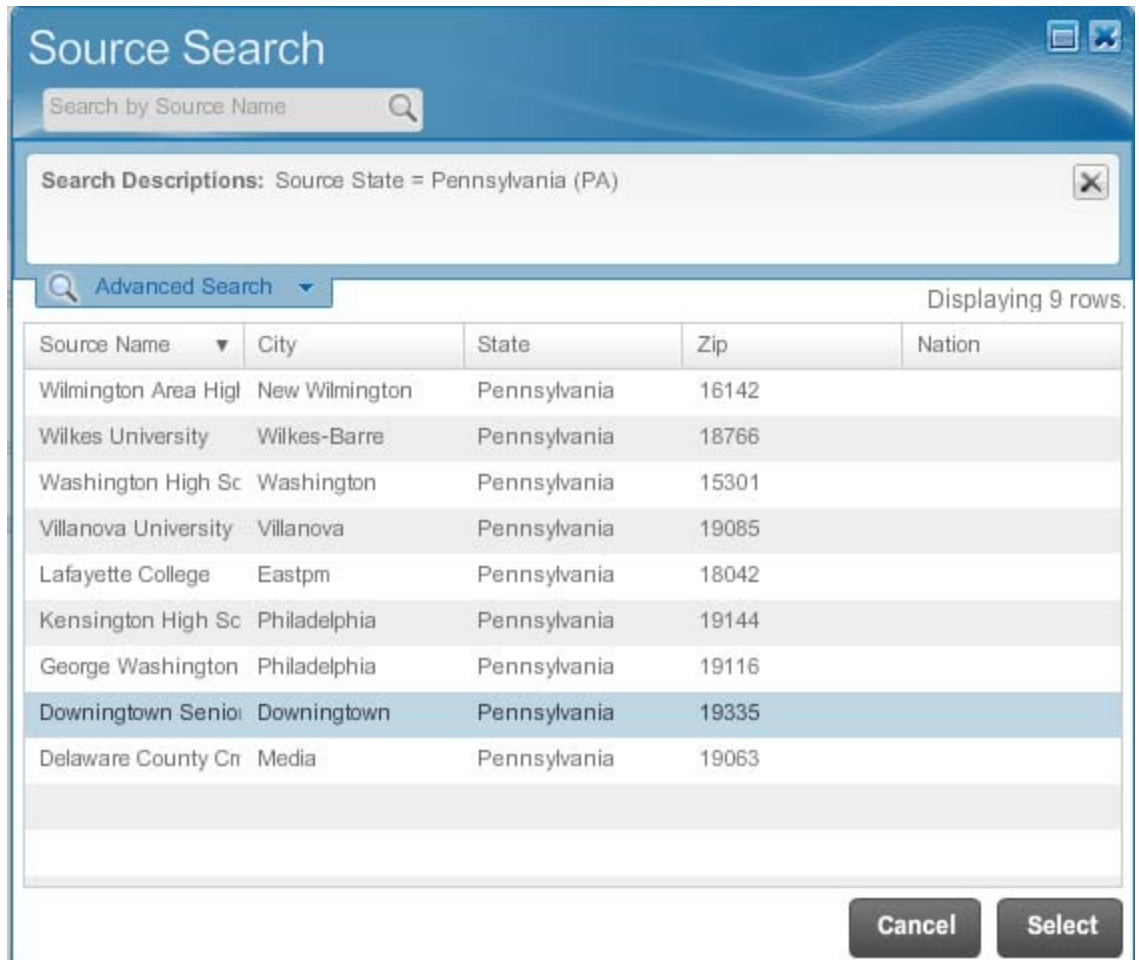
Add and Remove Sources

Add Source

Source: * ☐ Primary


Code	Description	Primary

- Click  in the **Add and Remove Sources** window to open a list of sources.



The 'Source Search' window has a blue header with the title 'Source Search' and window controls. Below the header is a search bar labeled 'Search by Source Name' with a magnifying glass icon. A section titled 'Search Descriptions:' contains the text 'Source State = Pennsylvania (PA)' and a close button. Below this is a tab labeled 'Advanced Search' with a dropdown arrow. To the right of the tabs, it says 'Displaying 9 rows.' Below the tabs is a table with five columns: 'Source Name', 'City', 'State', 'Zip', and 'Nation'. The table contains nine rows of data. The row for 'Downingtown Senior' is highlighted. At the bottom right of the window are two buttons: 'Cancel' and 'Select'.

Source Name	City	State	Zip	Nation
Wilmington Area High School	New Wilmington	Pennsylvania	16142	
Wilkes University	Wilkes-Barre	Pennsylvania	18766	
Washington High School	Washington	Pennsylvania	15301	
Villanova University	Villanova	Pennsylvania	19085	
Lafayette College	Easton	Pennsylvania	18042	
Kensington High School	Philadelphia	Pennsylvania	19144	
George Washington University	Philadelphia	Pennsylvania	19116	
Downingtown Senior High School	Downingtown	Pennsylvania	19335	
Delaware County Community College	Media	Pennsylvania	19063	

- Enter source in **Search by Source Name** field window and press Enter.
Note: Click the Advanced Search drop-down arrow and select
- Click or highlight the source name.
- Click **Select** to return to the **Add and Remove Sources** screen.
- Click **Complete** to save the new source.
- To delete a source click the **Delete**  icon.
- Click **Save** to apply the changes. Click **Cancel** to return to the main page without saving the changes.

Recruitment Information

Introduction

Prospect recruitment information includes Recruitment Status and Recruiter data. Recruitment status information for an individual includes the recruit type, student type, recruit status, admission type, withdrawal reason, and institution attending. Recruiter data identifies the recruiter assigned to this prospect, their role, the geo-region, division, and address type.

Status


Recruitment status information for an individual includes the following: Recruit Type, Student Type, Recruit Status, Admission Type, Withdrawal Reason, and Institution Attending. Recruiters can use this information to classify recruits and applicants. Information about recruitment status can be added or changed.

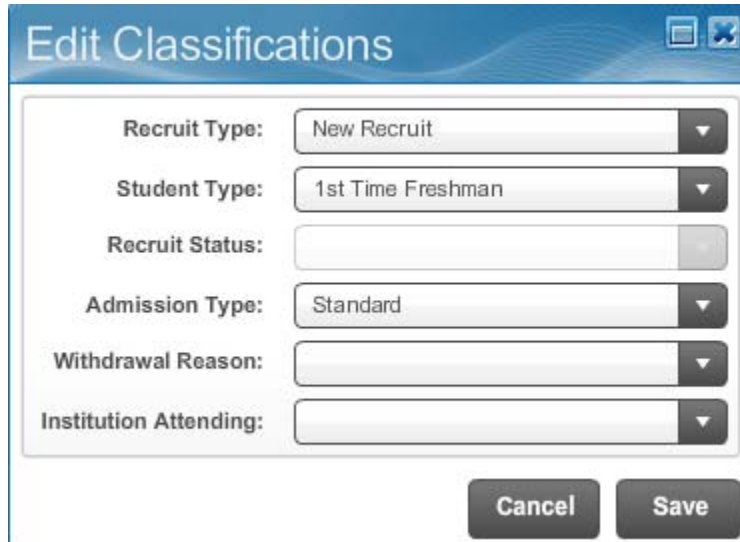
The screenshot displays a web application interface for managing prospects. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Joshua Lee" and features a "Status" tab. The "Classifications" section shows the following details:

Classification	Value
Recruit Type:	1st Time Freshman
Recruit Status:	Standard
Withdrawal Reason:	
Institution Attending:	

On the right side, the "Recruit Track" section shows a list of tracks, including "Fall 2010-1 UG Biology". The "Profile Summary" section provides contact information for Joshua S Lee, including a Banner ID, phone numbers, email, and address.

To add or edit classifications:

1. In the **Classifications** section of the page, click **Edit**  to open the Edit window.
2. Use the drop down menus to edit the appropriate field.



3. Click **Save** to save your changes. Click **Cancel** to return without saving.

Recruiter

A recruiter can be any one of a number of people who work in your Admissions Office. To distinguish the responsibilities of a particular person, each recruiter is also assigned a role. The recruiters and roles are set up in Banner Administrator assignments. Administrator assignment roles specific to the role of recruiter are designated in the Banner Integration Configuration Settings form (GORICCR). The Recruiting and Admissions Performance solution uses the recruiter roles designated in GORICCR for reports and analytics related to recruiter effectiveness.

The screenshot displays the Banner Relationship Management interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. Below this, a sidebar on the left contains a 'Search for Prospects' section and a list of categories: Prospect Overview, Biographical, Academic, Personal Outlook, Recruitment (highlighted with a blue arrow), Ratings, Admission, and Interaction. The main content area shows the profile of 'Joshua Lee' with tabs for Status and Recruiter. The Recruiter tab is active, displaying 'Assigned Recruiter' and 'Geo-Region' fields, each with a pencil icon for editing. Below these fields are 'Create Interaction' and 'Contact' buttons. On the right side, there is a 'Recruit Track' section showing 'Fall 2010-1 UG Biology' and a 'Profile Summary' section for 'Joshua S Lee' with details like Banner ID, phone numbers, email, and address.

One or more recruiters can be assigned to a prospect. A recruiter works with the prospect to build a relationship, increase the prospect's interest in the institution and to encourage them to submit an application. The recruiter continues to monitor and work with the individual and thereby move them along in the recruitment funnel. Each recruiter must be assigned a role. In the case of multiple recruit tracks, a recruiter can be assigned to a particular track.

Recruiters and roles are Administrator assignments in Banner. In the Prospects tab, you can assign a recruiter to a prospect or delete that assignment on the Assigned Recruiter window on the Recruitment tab. Administrator assignment roles specific to the role of recruiter are designated in the Banner Integration Configuration Settings form (GORICCR). This Banner form should be updated appropriately in order for Assigned Recruiter field to work correctly in Relationship Management.

Steps

1. To edit the recruiter information, click the **Edit** (✎) icon in the **Assigned Recruiter** area.

The screenshot shows a software window titled "Edit Assigned Recruiter". Inside the window, there is a section titled "Add Recruiter". This section contains two input fields: "Recruiter: *" with a dropdown arrow and "Role: *" with a text input field and a three-dot menu. Below these fields are "Cancel" and "Complete" buttons. At the bottom of the window, there is a table with two columns, "Recruiter" and "Role", and several empty rows. At the very bottom of the window are "Cancel", "Add Recruiter", and "Save" buttons.

2. Make the desired changes to the **Recruiter** and **Role** fields.
3. Click the **Complete** button in the Edit Recruiter window. The recruiter information will appear in the bottom half of the window to indicate that the change has been applied.
4. Click the **Save** button to retain the change, or **Cancel** to discard applied changes and exit.

Geo-Region

1. To edit the Geo-region information, click the **Edit** (✎) icon in the **Geo-Region** area.

Edit Geographic Regions

Add Geo-Region

Region: * Division: *
Address Type: *

Region	Division	Address Type	
Northeastern United States	Development Office	Mailing	<input type="button" value="X"/>

2. Make the desired changes to the **Region**, **Division** and **Address Type** fields.
3. Click the **Complete** button. The geographic region information will appear in the bottom half of the window to indicate that the change has been applied.
4. Click the **Save** button to retain the change, or **Cancel** to discard applied changes and exit.

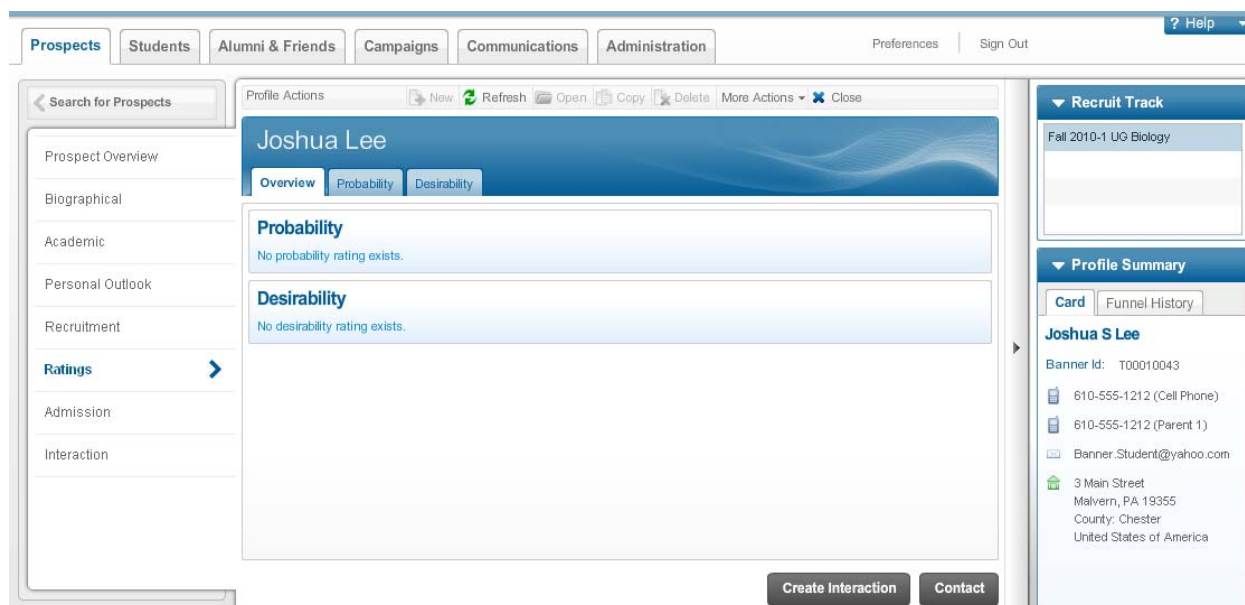
Ratings Information

Introduction

For Relationship Management, a rating is a way to assess a point value, or score, to an individual prospect based on how that prospect measures against institutionally defined factors.

Ratings are:

- used to quickly identify / assess candidate prospects that align with enrollment goals
- used to identify populations for targeted and specialized recruiting campaigns.



Ratings in Relationship Management:

Ratings are another implementation of the Lifecycle Management core components. Lifecycle Management components are also used by funnels. Like funnels, ratings are derived from model definitions and running instances.

The first ratings introduced are Probability and Desirability (P&D).

- We provide customizable P&D definitions

- We provide current scoring information for prospects
- We provide graphical representation of the prospect's score and its relationship to the pool of prospects within the same term and level.

Implementation of Ratings is optional.

What is Probability?

Probability represents the likelihood that a prospect will enroll in the institution.

What is Desirability?

Desirability represents how closely a prospect matches the enrollment goals and objectives of the institution.

Admission Information

Introduction

Admission information concerns an individual's application, such as any application decisions that the institution has made and a check list of required documents that the individual needs to complete. Admission Application information is display only in Enrollment Management Relationships.

The Admission Application is the official document that a person completes to be considered for admission to the institution. Multiple applications may be submitted, with various choices of programs. If a person applies to more than one term, level, program, field of study, or college, the applications will be numbered in the order in which they were received. If the person has multiple applications, they will have multiple Recruit tracks.

Application Decisions include the description of the current admission decision and the decision date.

Each institution determines which documents or other requirements are part of the Admission Check List. The items on the Check List must be submitted to the institution before the Admission Application is considered complete. Only the items that are marked as mandatory will affect the application status. The application status is maintained in Banner. The status is Incomplete until all mandatory Check List items are marked received. When all items are marked received the status is changed to Complete.

The screenshot displays the Banner CRM interface for a prospect named Joshua Lee. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The left sidebar shows a list of prospect information categories, with 'Admission' selected. The main content area is titled 'Joshua Lee' and contains several sections: 'Application' (Level: Undergraduate, College: College of Arts Sciences, Application #: 1, Degree: Bachelor of Arts, Program: BS in Biology, Field of Study: Biology, Application Pref #: , Student Type: 1st Time Freshman), 'Application Decisions', and 'Check List'. The 'Check List' section is a table with columns for Required, Received, and Description. The right sidebar shows the 'Recruit Track' (Fall 2010-1 UG Biology) and 'Profile Summary' (Joshua S Lee, Banner Id: T00010043, contact information, and address).

Required	Received	Description
Yes		SAT or ACT Scores
Yes	Jun 21, 2010	\$25 Application Fee

The **Admissions** page contains the following view-only fields:

- **Level** - Displays the level of study for this application.
- **Program** - Displays the program chosen by this individual.
- **College** - Displays the college in which this curriculum belongs.
- **Field of Study** - Displays the field of study chosen by this individual.
- **Application #** - If the individual has submitted multiple applications, displays the number for this application.
- **Application Pref #** - If the individual has submitted multiple applications, displays the preference number for this application.
- **Degree** - Displays the degree the student is seeking.
- **Application Decisions** - Displays the description and date the decision was entered into Banner.
- **Required** - Indicates whether a mandatory check list item is required to complete this application.
- **Received** - Indicates the date when a check list item was received.
- **Description** - Displays the documents or other requirements requested to complete this application.

Note: Use the scroll bar to view more information.

The **Check List Items** area contains all of the items that are required to be completed by the applicant before the Admissions Application is considered complete. When viewing the check list from the Prospect Overview, the check list will display with a Received Date associated with any item that is complete.

Interactions

Introduction

An Interaction is a communication, or event, that has taken place between the institution and the prospect. Some Interactions are added automatically if the communication is generated from within Relationship Management. Other Interactions may be manually added by a user with appropriate permissions.

Examples of Interactions include:

- an e-mail contact from a recruiter to a prospect sent from within Relationship Management
- a mass mailing generated from a campaign in Relationship Management
- a targeted announcement generated from within Relationship Management and displayed in the prospect's Prospective Student Portal account
- a manual entry by a recruiter concerning a telephone conversation with a prospect
- a manual entry by a recruiter indicating that a prospect has attended an event such as a Campus Tour
- a contact about attending a college night that was entered in Banner on the Recruit or Admissions form on the Contacts, Cohorts, Attributes Tab
- a Watch List that contains a list of prospects and interactions to be monitored. Watch Lists display in the upper right hand corner of the Interactions window.

Interaction Watch List

Watch List functionality is accessible from the Prospects tab by clicking Interactions in the navigation panel on the left of the screen.

The initial page allows for query on Interactions by Prospect.

- You can search based on the last name of a prospect.
- Advanced Search Criteria are also available for searching.

You also have the ability to set up a “Watch List”. This is a customized grouping of population lists for which the recruiter can monitor any interactions that occur for profiles in the lists within specified time frames. The recruiter can quickly and easily access and view the most recent interactions related to any profiles of interest, without having to drill down into each profile.

The full prospect profile is now available from the Interaction Watch List. When you query a Watch List or a list of interactions in the Prospects tab and highlights a specific interaction, a **View Profile** link is available in the **More Actions** toolbar. Selecting View Profile opens the profile overview

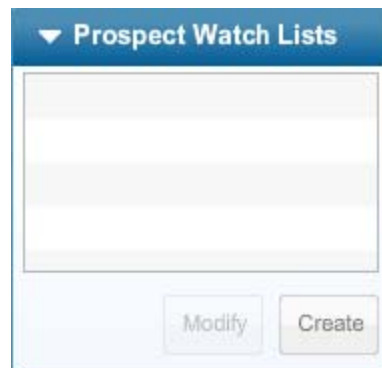
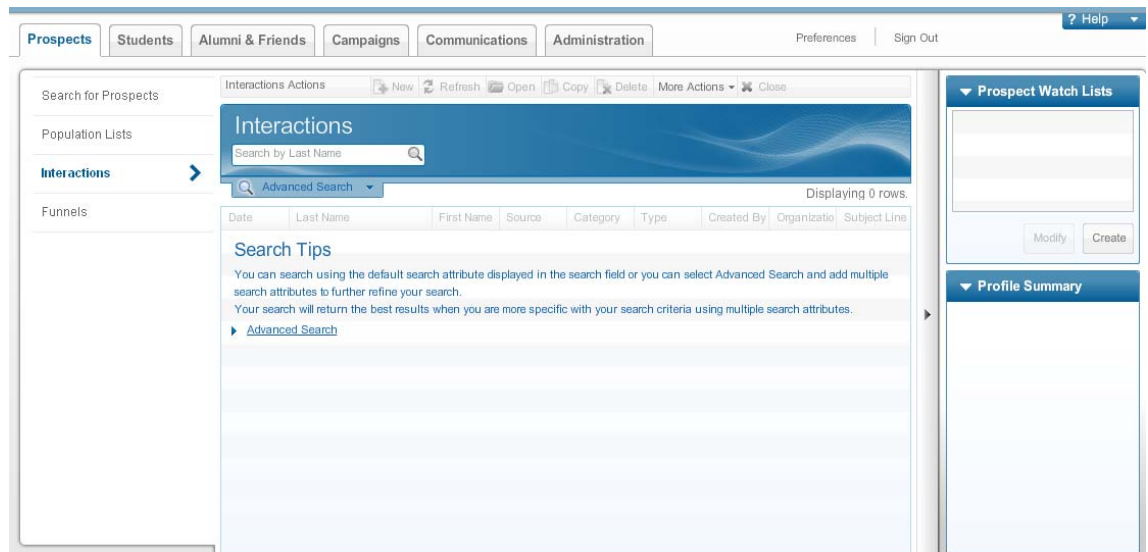
The Watch List Panel is at the upper right hand of the Interactions window. A Watch List can be created at any time while in Interactions.

Characteristics of a Watch List

- It is a personalized view for a specific user. Other users cannot view others' personal lists.
- One Watch List entry allows for one-to-many lists to be aggregated
- Users may have several Watch Lists
- Default search shows any interaction activity in the last 48 hours
- Searches can be modified to reflect changed date ranges.

Creating a Watch List


1. Click on Interactions on the Navigation Panel in the Prospects tab. The Prospect Watch List panel is visible in the upper right hand of the screen.

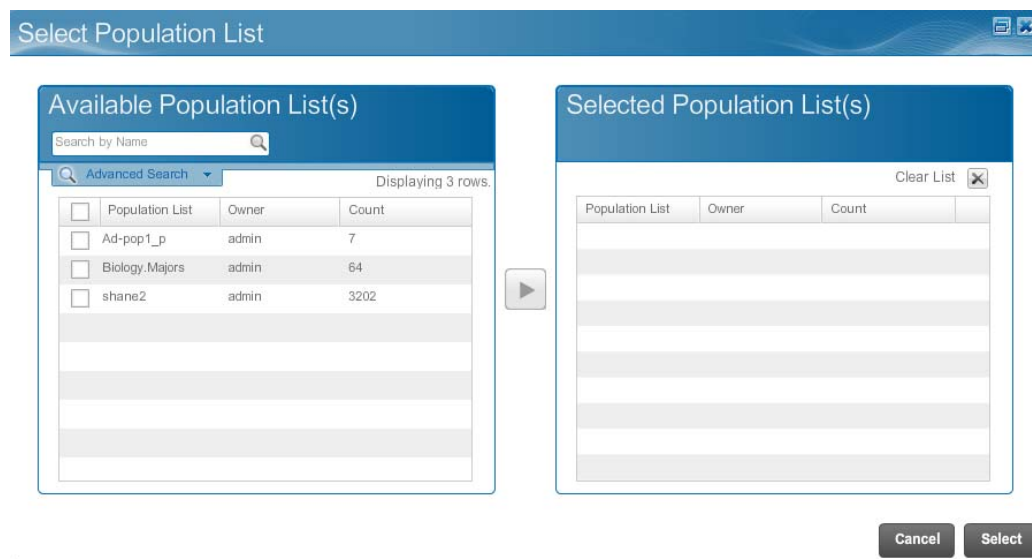


2. To create a Watch List, click on the **Create** button.



The 'Create Watch List' dialog box has a blue header with the title 'Create Watch List'. It contains two input fields: 'Name: *' with the text 'Biology Majors' and 'Population List: *' with the text 'Biology Majors'. To the right of the 'Population List' field is a small button with three dots. At the bottom right are 'Cancel' and 'Save' buttons.

3. Enter the name of the watch list in the **Name** field.
4. Click  to select a population list. The Select Population List window will display.
5. The Selected Population List (s) displays all available Population Lists.
6. You may search for a specific Population List by entering a name or using Advanced Search.
7. You may select one or more Population Lists to create your own watch list.



The 'Select Population List' dialog box has a blue header with the title 'Select Population List'. It is divided into two main panels. The left panel, titled 'Available Population List(s)', contains a search bar with 'Search by Name' and a magnifying glass icon, an 'Advanced Search' dropdown, and a table with 3 rows. The table has columns for 'Population List', 'Owner', and 'Count'. The right panel, titled 'Selected Population List(s)', has a 'Clear List' button with an 'X' icon and an empty table with the same columns. A right-pointing arrow button is between the two panels. At the bottom right are 'Cancel' and 'Select' buttons.

Population List	Owner	Count
Ad-pop1_p	admin	7
Biology.Majors	admin	64
shane2	admin	3202

8. Click the arrow between the panels to move the highlighted Population List to the Selected Population List(s) panel. You can also delete the list you created by clicking the "X" icon in the Population List panel.
9. Click **Select**, which will cause the Profiles to display in the List you just created.

Select Population List

Available Population List(s)

Search by Name

Advanced Search

Displaying 2 rows.

<input type="checkbox"/>	Population List	Owner	Count
<input type="checkbox"/>	Ad-pop1_p	admin	7
<input type="checkbox"/>	shane2	admin	3202
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Selected Population List(s)

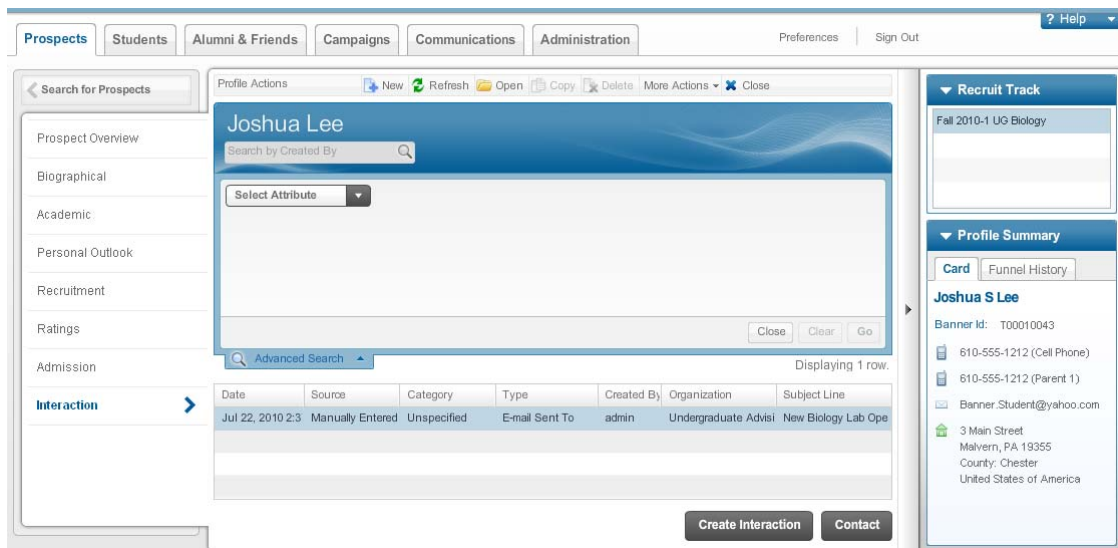
Clear List

Population List	Owner	Count	
Biology.Majors	admin	64	<input type="checkbox"/>

Cancel

Select


The history of all Interactions is stored and the most recent Interaction is displayed at the top of the listing in the Prospect Interaction window. You can search on a variety of attributes to locate or view an Interaction.




Search for an Interaction

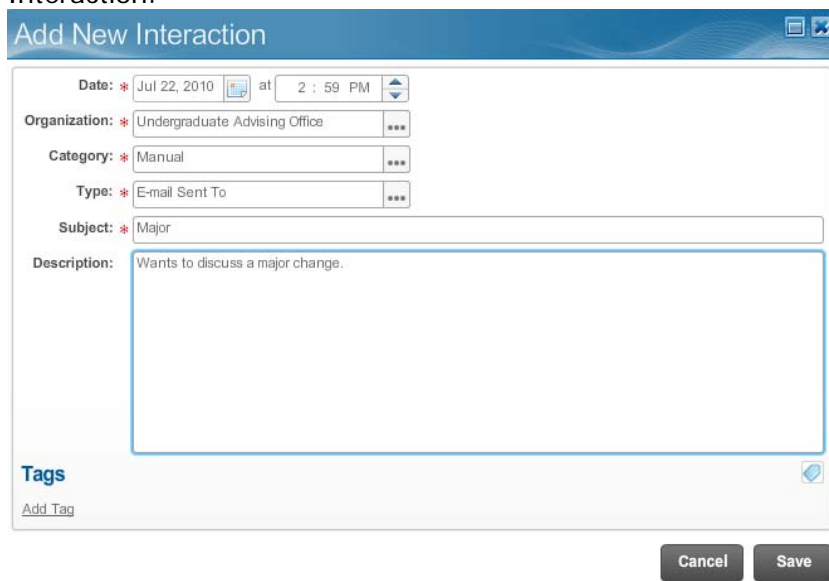
1. Enter your search criteria in the Search field using a basic or advanced search option.
2. Click **Go** to display the results of your search.

View an Interaction

1. Double click on the Interaction you wish to view or highlight and click the Open button  in the action toolbar. The text of the communication will be displayed.

Create an Interaction

1. Click the **Create Interaction** button. The **Add New Interaction** view will appear. Any fields marked with a red asterisk * are required fields.
2. Click the **Calendar** () icon in the **Date** field and select the date of the Interaction.



Add New Interaction

Date: * Jul 22, 2010 at 2 : 59 PM

Organization: * Undergraduate Advising Office ***

Category: * Manual ***

Type: * E-mail Sent To ***

Subject: * Major

Description: Wants to discuss a major change.

Tags

[Add Tag](#)

Cancel Save

3. Adjust the time of the Interaction as desired.
4. Click the arrow in the **Organization** field and select the organization of the Interaction.
5. Click the arrow in the **Category** field and select the category of the Interaction.
6. Click the arrow in the **Type** field and select the type of Interaction.
7. Enter a Subject line in the **Subject** field.
8. Enter a description of the Interaction in the **Description** field. (**Note:** it is possible to 'paste' information into the Description field; for example, the text of an email that a prospect has sent to a recruiter's email account can be copied and pasted here).
9. Click the **Save** button.

Contact a Prospect

Recruiters and admissions personnel can send an e-mail to a prospect directly from the Profile Overview.

The screenshot shows a web interface titled "Contact". It has two main sections: "Contact Information" and "Message".

Contact Information:


- From:** admin@sampleschool.edu
- To:** Banner.Student@yahoo.com
- Subject:** * [text input field]
- Interaction Category:** [dropdown menu]
- Sender Organization:** * [text input field]

Message:

Below the "Message" header is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, text color, background color), alignment, and other functions. Below the toolbar is a large text area for composing the message.

At the bottom right of the interface are three buttons: "Cancel", "Schedule", and "Send".

































Steps to send an e-mail to a prospect from the Prospect Overview:

1. Click the **Contact**  button. The Editor Toolbar opens.
2. You can choose to use a previously defined template by clicking **Use Template** in the upper right hand corner of the pane. The defined templates are created in the Communications workspace.
3. You can create the text of your communication using the Editor as directed in the Communications Workbook.
4. The Editor Toolbar lets you enter text with a variety of formatting, including embedding of links, pictures and other files as needed.

The Editor Toolbar utilizes the power of FCK Editor, which is a lightweight text editor used in web pages. Using this tool, a user can write text or copy it from Microsoft Word, format it, create tables, and so on.

The Editor Toolbar contains formatting tools that allow you to enhance and customize the appearance of your text as shown in the following table:

The following tools are available in the Editor Toolbar:

- | | |
|---|---|
|  - View/Hide HTML source |  - Change selected text format to underline |
|  - Select a formatting template |  - Change selected text format to strike through |
|  - Cut selected elements from the text |  - Insert/Remove a numbered list |
|  - Copy selected elements to the clipboard |  - Insert/Remove a bulleted list |
|  - Paste items from the clipboard into the text |  - Decrease paragraph indent |
|  - Paste text from the clipboard into the text |  - Increase paragraph indent |
|  - Paste Microsoft Word content from the clipboard into the text |  - Apply left justification to selected text |
|  - Spell check the text |  - Apply center justification to selected text |
|  - Undo changes to the text |  - Apply right justification to selected text |
|  - Redo changes to the text |  - Apply block justification to selected text |
|  - Search the text content |  - Insert an HTML link |
|  - Replace text content. |  - Remove an HTML link |
|  - Select all items in the text |  - Insert/Edit an HTML anchor |
|  - Remove all formatting from the selected item |  - Insert/Edit an image |
|  - Change selected text format to bold |  - Insert/Edit a table |
|  - Change selected text format to italic |  - Insert special characters |

More information regarding the FCK Editor functions can be found in the Communications Workbook.

5. Click **Send** to send immediately.
6. Click **Schedule** to schedule a future date and time for the e-mail contact to be sent.

Population Lists



Population Lists

Introduction

A Population List consists of a number of prospective students' profiles that share one or more common attributes or groups of attributes. You create a Population List to serve as the target of an enrollment campaign or communication.

Population lists are also used to create Interaction Watch Lists. A recruiting record must exist within the Banner database to be displayed in the Profile Manager workspace, and be included in a Population List.

To access a list of existing Population Lists, select **Population Lists** from the Profile Manager tab.

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 342) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled "Population Lists" and features a search bar, a table of existing lists, and a right-hand sidebar with "My Prospect Lists" and "Population Summary" sections.

Name	Description	Status	Access	Owner	Creation Date	List Count	Last Calculated
DMM.Poplist		Available	Personal	admin	Aug 02, 2010 8:	0	
zbttest		Available	Personal	admin	Aug 01, 2010 9:	0	
Advisors		Available	Personal	admin	Aug 01, 2010 9:	0	
Biology Majors	Prospects who	Available	Personal	admin	Aug 01, 2010 9:	22	Aug 01, 2010 2:

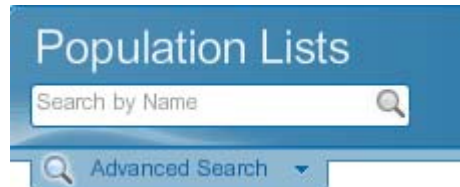
Population Lists which you have created are listed in the **My List** panel on the right side of the screen. A brief summary of a highlighted Population List appears in the **Population Summary** panel.

From this screen you can search for a Population List, create a new Population List, open a list and delete a list.

Search for a Population List


To search for a Population List, use the following procedure:

1. Enter your search criteria in the Search field or use the Advanced Search function.



2. Click the **Go** arrow.
3. The Population Lists that meet your search criteria display in the list below.

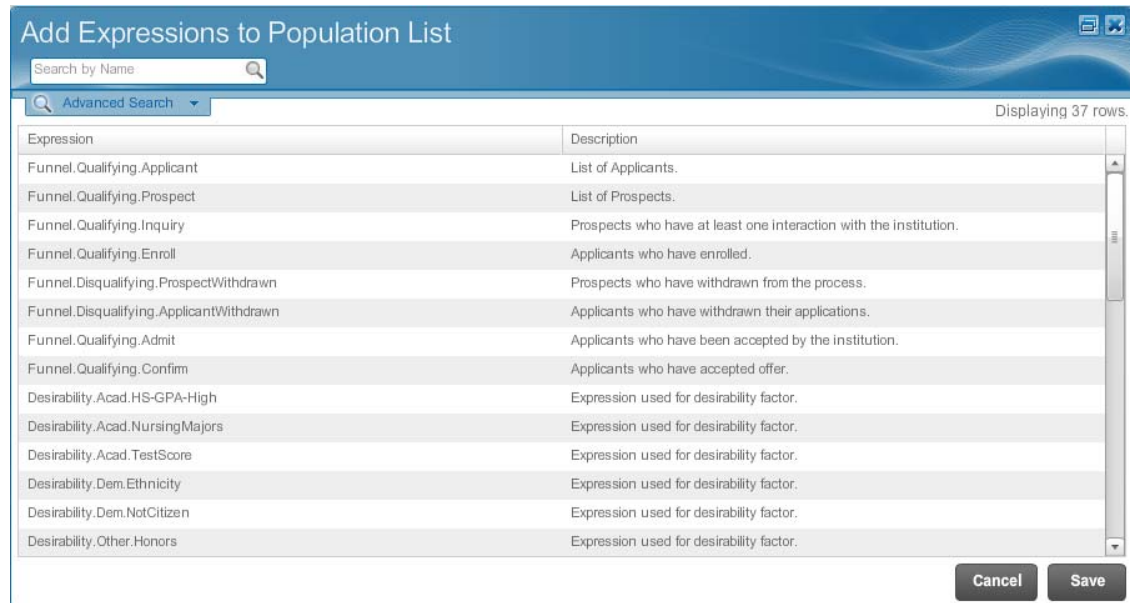
Create a Population List

1. From the **Populations List** window in Prospect tab click **New**  in the action toolbar.
2. Enter a name for the new Population List. This is a required field.

A screenshot of a "Create Population List" form. The form has a title bar with the text "Create Population List" and window control buttons. It contains two text input fields: "Name: *" (with a red asterisk indicating it is required) and "Description:". Below these fields is a section titled "Expression Options" with a dropdown arrow. This section contains a table with two columns: "Expression Name" and "Parameter". The table is currently empty. At the bottom of the form are three buttons: "Cancel", "Add Expression", and "Save".

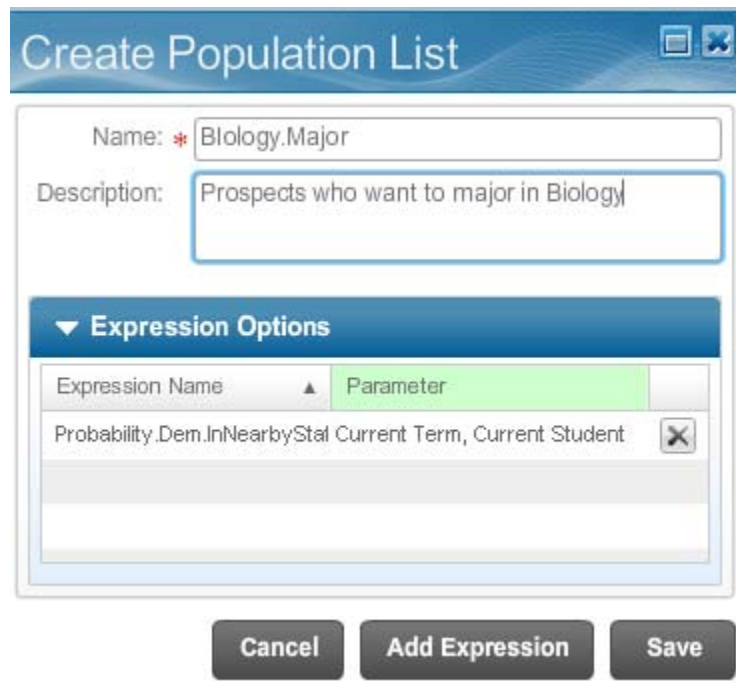
3. Provide a short description for the new Population List.

4. To add an Expression to the population list, click **Add Expression**. These Expressions have been created in the Administration workspace. To learn more about Expressions please refer to the Expressions Workbook.



Expression	Description
Funnel.Qualifying.Applicant	List of Applicants.
Funnel.Qualifying.Prospect	List of Prospects.
Funnel.Qualifying.Inquiry	Prospects who have at least one interaction with the institution.
Funnel.Qualifying.Enroll	Applicants who have enrolled.
Funnel.Disqualifying.ProspectWithdrawn	Prospects who have withdrawn from the process.
Funnel.Disqualifying.ApplicantWithdrawn	Applicants who have withdrawn their applications.
Funnel.Qualifying.Admit	Applicants who have been accepted by the institution.
Funnel.Qualifying.Confirm	Applicants who have accepted offer.
Desirability.Acad.HS-GPA-High	Expression used for desirability factor.
Desirability.Acad.NursingMajors	Expression used for desirability factor.
Desirability.Acad.TestScore	Expression used for desirability factor.
Desirability.Dem.Ethnicity	Expression used for desirability factor.
Desirability.Dem.NotCitizen	Expression used for desirability factor.
Desirability.Other.Honors	Expression used for desirability factor.

5. Select the Expression to add to the Population List.



Name: * Biology.Major

Description: Prospects who want to major in Biology

▼ Expression Options

Expression Name
Parameter
Probability.Dem.InNearbyStat Current Term, Current Student

6. If the Expression includes parameters, select the Expression name to expose the attributes and enter the values that you require.

Create Population List

Name: * Biology.Major

Description: Prospects who want to major in Biology

▼ Expression Options

Expression Name	Parameter
Probability.Dem.InNearbySta	Current Term, Current Student

Current Term: [Field] ...
Description: Selects the persons with the term specified, in either the Application or Recruit record.

Current Student Level: [Field] ...
Description: Selects the persons with the level specified, associated with either the Application or Recruit record.


Cancel Add Expression Save

7. Click **Save** to store any changes you have made.

The system automatically saved the new Population List as a **personal**. Only the list's creator can add or delete profiles from this list.

Delete a Population List

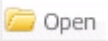
You may only delete a Population List for which you are the owner. To delete a Population List:

1. Select the list you want to delete.
2. Click **Delete**  on the Population List Actions toolbar.
3. **Confirm** the deletion.

Note: The Population List is now deleted.

Population List Overview

Overview

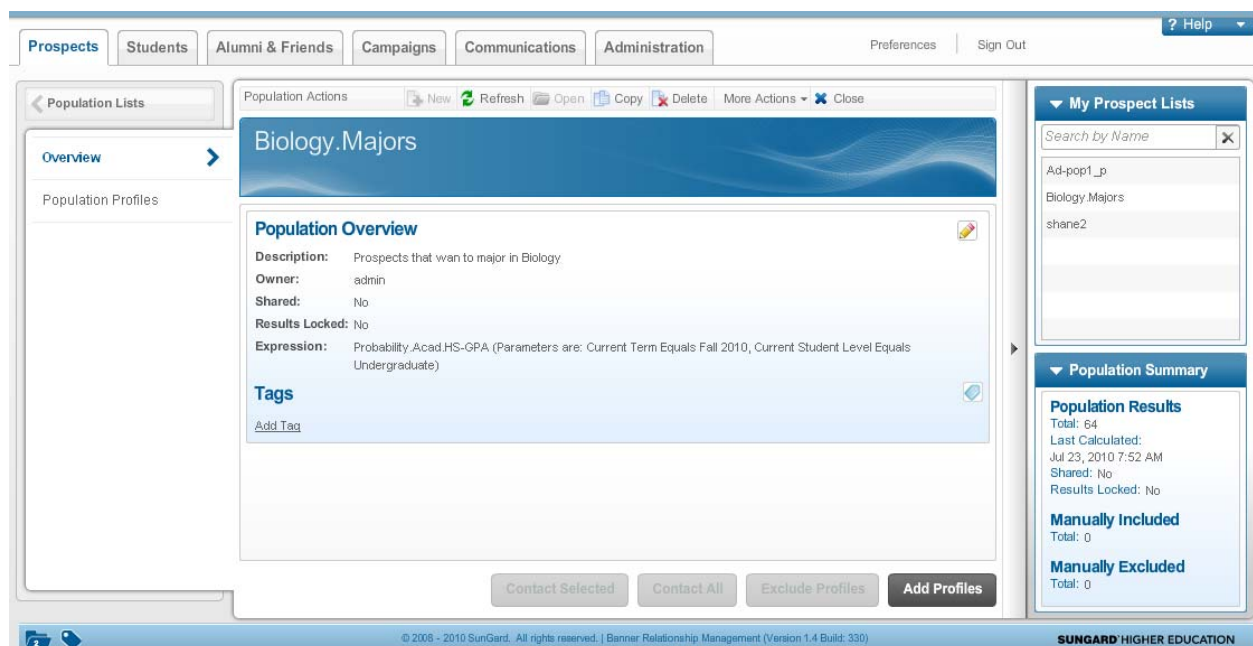
Select a Population List and click  from the toolbar or double click the entry name. This opens the Population List Overview window.

When you open an individual list from the Population Lists window, Relationship Management displays a summary or overview page containing all of the information about that particular list.

The Overview page displays the name of the list's creator, a brief description, the list's Lock status, and the Expressions and their parameters used to create the Population List.

The Population Summary in the lower sidebar displays the profiles that you added or excluded manually.

From the Overview page, you can edit all of the aspects of the list, and continue to refine the list by adding profiles. You can also send a contact to all prospects in the list using the Contact All function.



Your personal Population Lists will appear in the **My Prospect Lists** space in the top right panel but shared lists will not. The **Population Summary** panel gives an overview of the Population List.

It is important to note that certain menu items and button functions may or may not be available depending on the **Shared** status for the Population List.

- **Personal** - When you create a new Population List, the system automatically saves the list as a Personal list, which means that only you can add or delete profiles from it manually. Your personal lists will appear in your My Prospect Lists space. When you search for a Population List, the system displays all lists matching the search criteria. You can filter on "Owner" to see only your lists by using the Advanced Search function.

The system also saves the list with Results Unlocked. Anyone who can edit a list can lock or unlock it. Locking a list means it will not recalculate and you cannot manually add or exclude profiles from it. You can continue to edit the name and description of a locked list -- locking a list locks only the list results. You may choose to lock a list if you have ongoing activities with the list members, and you do not want the population to change.

Users can view other users' Personal lists, but cannot edit them. This means that they can view another user's Personal list name and description, and can open the list to see the prospects in the list, and can see which Expressions are used to create the list, as well as any manually included or excluded prospects for the list. They will not be able to edit any of that information in another user's Personal list, nor will they be able to manually add or exclude prospects.

- **Shared** - You can edit the new list to change it to a Shared list, giving all users access to the population list. Shared lists do not appear in your My Lists space. Once you share a list, it cannot be made personal again. Shared lists can be seen by all users, but modified only by users with specific roles/permissions.

All users can make a Personal copy of a Shared list for their own purposes.

Tags

You can associate a tag with an entity directly from the entity's Overview page. Add and Remove Tags capability is available on the Overview page for Populations, Campaigns, Templates, Profile Interactions, and Expressions. Each Overview detail page allows you to add and remove existing tags, and add additional tags.

Use the **Tag** icon to open and edit the existing list of tags associated with the entity. If no tags exist, the overview displays the **Add Tag** link. Click the link or the **Tag** icon to add any available tags to the item directly from its overview page.

You can create multiple tags at once; the system adds commas to separate them as you type them in. Click the link to view the list of available tags, begin typing, and the system auto-filters tags as you type.

The screenshot displays the SunGard Banner Relationship Management interface for managing prospect populations. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The left sidebar shows 'Population Lists' and 'Overview'. The main content area is titled 'Biology Majors' and contains a 'Population Overview' section with the following details:

- Description:** Prospects who want to major in Biology
- Owner:** admin
- Shared:** No
- Results Locked:** No
- Expression:** Biology Major (Parameters are: Field Of Study Equals Biology, Curriculum Term Equals Fall 2010)



Below the overview is a 'Tags' section with a text input field containing 'College of Arts and Science, Undergraduate Recruiting,' and a 'Close' button. An 'Available Tags' section lists various tags: Alumni, Athletic Recruiting, College of Arts and Science, College of Business Administration, College of Education, Current Students, Football, Friends, Law School, and Undergraduate Recruiting.

The right sidebar shows 'My Prospect Lists' with a search bar and a list of advisors. Below this is the 'Population Summary' section, which includes the following data:

- Population Results:** Total: 22, Last Calculated: Aug 01, 2010 2:10 PM, Shared: No, Results Locked: No
- Manually Included:** Total: 1
- Manually Excluded:** Total: 0

At the bottom of the main content area, there are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'. The footer of the interface shows the copyright information: © 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 342) and the SunGard Higher Education logo.

Edit a Population List

1. Select a Population List and click  **Open** from the toolbar or double click the entry name. This opens the Population List Overview page.
2. In the **Population Overview** section of the page, click **Edit** 

Population Overview

Description: Prospects who want to major in Biology

Owner: admin

Shared: No

Results Locked: No

Expression: Biology.Major (Parameters are: Field Of Study Equals Biology, Curriculum Term Equals Fall 2010)

Tags

[Add Tag](#)

This opens the Edit window.

Edit Population List


Name: * Biology.Majors

Description: Prospects that wan to major in Biology

Shared: ☐ Yes

Lock Results: ☐ Yes

▼ Expression Options

Expression Name	Parameter	
Probability.Acad.HS-GPA	Current Term, Current Student	

Cancel **Add Expression** **Save**


3. Edit the fields as needed:

- **Name** - Modify the name of the Population List. This is a required field.
- **Description** - Modify the description of the Population List.
- **Shared** - Select the Shared checkbox to allow this Population List to be shared.
- **Lock Results** - Select the Lock Results checkbox to freeze the Population List and prevent it from being updated.
- **Add Expression** - Click **Add Expression** to add an Expression to the Population List. If the Expression has parameters, select the parameters to display the attributes and enter the appropriate values. To remove an Expression click ☐ **Delete** next to the expression.

4. Click **Save** to store any changes you have made. Click **Cancel** to discard any changes you have made.

Add a profile to a list

You can add constituents to a list manually if they were not included in the initial Population List based on their attributes. When the manual additions become part of the list, they remain in the list even after it is rerun. If you want to later remove a prospect you added manually, you must remove that prospect manually as well. Manual additions are not removed as the result of the rerun of an Expression.

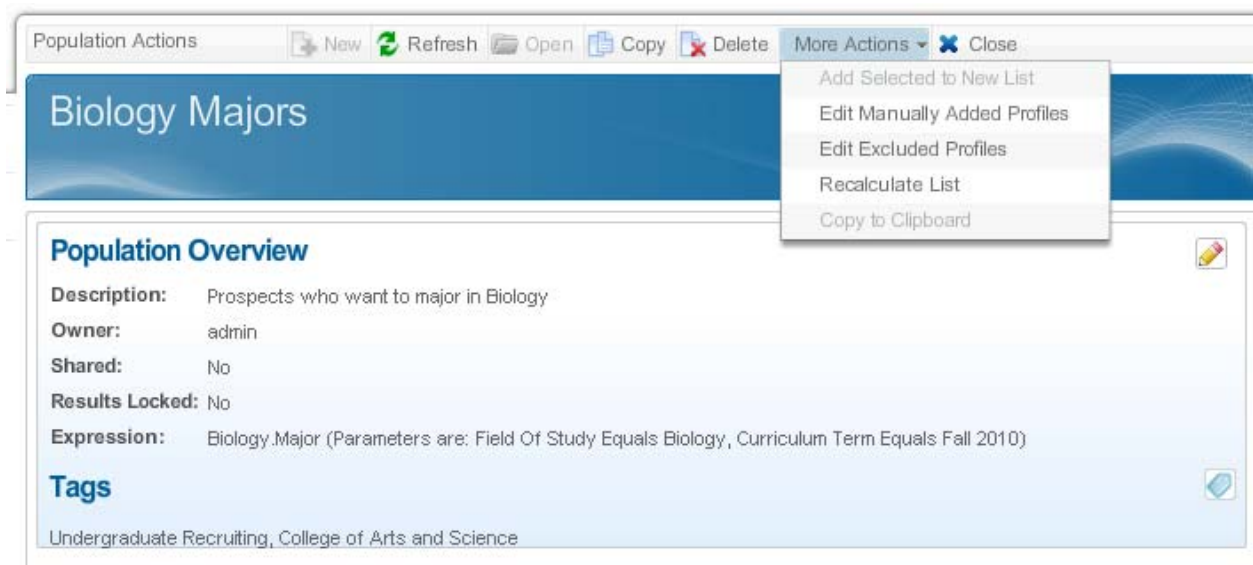
1. Click  **Add Profiles** to search for profiles to be added to the Population List.
2. Search for and select the profiles that you would like to add.
3. Click **Add**.

Contact all prospects in a Population List

1. In the Population Overview page, click the **Population** Profiles link.
2. Click Contact **All**  to send an e-mail message to all prospects in the list.
3. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this workbook.
4. Click **Schedule** to assign a specific date and time that this e-mail will be sent to the recipients or Click **Send** to immediately send the message.

More Actions

From the **More Actions** drop down list in the **Population** Actions bar, you can choose from several additional actions to perform on the current Population List. The menu options vary depending on if the Population List is shared.



Edit Manually Added Profiles

This function allows you to edit the profiles that were manually added to the current Population List. Select the profile you wish to remove from the list and click the **Remove** button.

Edit Manual Added Profiles: Ad-pop1_p

Search by Last Name

Advanced Search

Displaying 7 rows.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Term
Bingaman	Joie	Romelia	Aug 06, 1981	Humbird	Wisconsin	54746	Summer 199
Binford	Hunter	Harrison	Aug 30, 1991	Winnett		55412	Fall 2010
Bing	Julissa	Rosalie	Dec 09, 1981	Sardis	Tennessee	38371	Spring 2009
Bines	Isaac	Cruz	Sep 10, 1991	Bathgate	North Dakota	58216	Fall 1998
Binning	Lewis	Teodoro	May 11, 1991	Kalispell	Montana	59904	Spring 2005
Lee	Joshua	S	Jan 01, 1991	Malvern	Pennsylvania	19355	Fall 2010
Binns	Glennis	Stephane	Apr 24, 1981	Bremen	Indiana	46506	The End of

Cancel Remove

Edit Excluded Profiles

This function allows you to edit the profiles that were manually excluded from the current Population List. Click **Remove** to restore the excluded profile to the Population List.

Edit Manual Added Profiles: Ad-pop1_p

Search by Last Name

Advanced Search

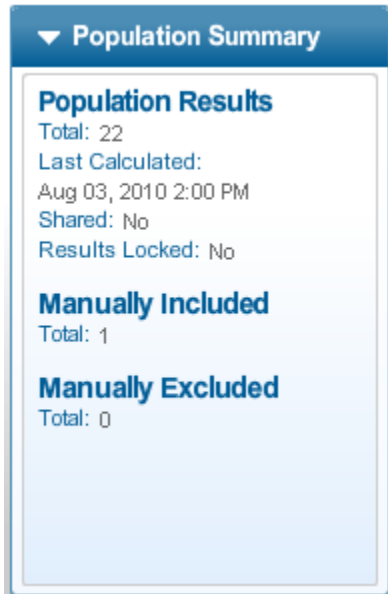
Displaying 7 rows.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Term
Bingaman	Joie	Romelia	Aug 06, 1981	Humbird	Wisconsin	54746	Summer 199
Binford	Hunter	Harrison	Aug 30, 1991	Winnett		55412	Fall 2010
Bing	Julissa	Rosalie	Dec 09, 1981	Sardis	Tennessee	38371	Spring 2009
Bines	Isaac	Cruz	Sep 10, 1991	Bathgate	North Dakota	58216	Fall 1998
Binning	Lewis	Teodoro	May 11, 1991	Kalispell	Montana	59904	Spring 2005
Lee	Joshua	S	Jan 01, 1991	Malvern	Pennsylvania	19355	Fall 2010
Binns	Glennis	Stephane	Apr 24, 1981	Bremen	Indiana	46506	The End of

Cancel Remove

Calculate List

This option is only available for **Shared** Population Lists. Once the **Recalculate** has been selected and performed, the Population summary panel **Population Results** total will change.



▼ Population Summary

Population Results
Total: 22
Last Calculated:
Aug 03, 2010 2:00 PM
Shared: No
Results Locked: No

Manually Included
Total: 1

Manually Excluded
Total: 0

Population Profiles

Population Profiles

The Population Profiles page summarizes the contents of a Population List, displaying the first 2500 individuals in the list along with their data.


From this page, access the More Actions button on the Population Actions toolbar to add or exclude profiles and recalculate the list. Using the Copy to Clipboard function, you can copy the displayed profiles and export the contents to a spreadsheet. You can also include a concatenated list of all the active telephone numbers for the prospect in addition to other copied profile information.

The screenshot displays the SunGard Higher Education Banner Relationship Management (Version 1.4 Build: 330) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area is titled 'Population Profiles' and shows a list of individuals for the 'Biology.Majors' population. The list includes columns for Last Name, First Name, Middle Name, Birth Date, City, State, Zip, Gender, and Term. The list is displaying 63 rows. On the right side, there is a 'My Prospect Lists' sidebar with a search bar and a list of prospect lists. Below the sidebar, there is a 'Population Summary' section showing 'Population Results' with a total of 63, last calculated on Jul 23, 2010 7:52 AM, and a 'Manually Included' section with a total of 0. At the bottom, there are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Gender	Term
Axford	Reggie	Byron	May 03, 1986	Hwassee	Virginia	24347	Male	Fall 2010
Bacote	Millie	Cassandra	Dec 08, 1987	Mobile	Alabama	36607	Female	Fall 2010
Bakker	Laurence	Joe	Feb 28, 1989	Decatur	Illinois	62521	Male	Fall 2010
Balbuena	Sueann	Lisa	May 29, 1988	Austin	Texas	78744	Female	Fall 2010
Beegle	Titus	Carmine	Feb 24, 1984	Donalds	South Carolir	29638	Male	Fall 2010
Bilbro	Jose	Yolanda	Jun 03, 1990	Erin	Tennessee	37061	Female	Fall 2010
Binford	Hunter	Harrison	Aug 30, 1990	Winnett		55412	Male	Fall 2010
Blea	Heath	Jerry	Dec 18, 1990	Statesville	North Carolin	28625	Male	Fall 2010
Brackney	Gregory	Augustus	Feb 07, 1987	Beaver	Ohio	45613	Male	Fall 2010
Brault	Deneen	Carley	Oct 11, 1987	California	Missouri	65018	Female	Fall 2010
Byrum	Demarcus	Earle	Dec 28, 1990	Snow	Oklahoma	74567	Male	Fall 2010
Chin	Matthew	S	Jan 01, 1992	Makern	Pennskani	19355	Male	Fall 2010


Add a profile to a list

You can add prospects to a list manually if they were not included in the Population List based on their attributes. When the manual additions become part of the list, they remain in the grouping even after it is rerun. If you want to later remove a constituent you added manually, you must remove that individual manually as well. Manual additions are not removed as the result of the rerun of an Expression.

1. Search for and select the Population List that you would like to edit.
2. Click  **Open**.
3. Click **Add Profiles** to search for profiles to be added to the Population List.
4. Search for and select the profiles that you would like to add.
5. Click **Add**.


Exclude a profile from a list

You may need to exclude some profiles from a Population List. Certain constituents, for example, may require special or personalized handling, or may have been reassigned to another recruiter, or may have simply lost interest in pursuing enrollment. Follow the steps below to remove or exclude constituents from a Population List:


1. Search for and select the Population List that you would like to edit.
2. Click  **Open**.
3. Select Population Profiles.
4. Select the profiles to exclude from the Population List.
5. Click **Exclude Profiles** to exclude unwanted profiles from the list.
6. If you are excluding profiles that were manually added to the Population List, you are asked to confirm that you want to remove the profiles.
7. Click **OK**.

Contact profiles in a population list

To contact all profiles in a Population List, follow these steps:

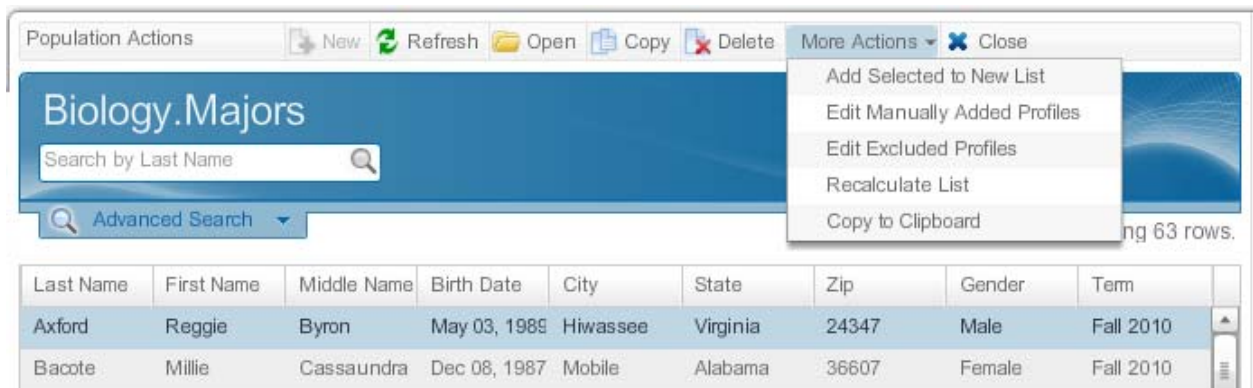
1. Search for and select the Population List that you would like to edit.
2. Click  **Open**.
3. Click **Contact All** to send an e-mail message to all prospects in the list.
4. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this Workbook.
5. Click **Schedule** to assign a specific date and time that this e-mail will be sent to the recipient or Click **Send** to immediately send the message.

Follow these steps to contact selected profiles in a Population List.

1. Search for and select the Population List that you would like to edit.
2. Click  **Open**.
3. Select Population Profiles.
4. Select the profiles to contact from the Population List. To select more than one profile in the list use the shift key or the control key.
5. Click **Contact Selected** to send an e-mail message to specific profiles in a Population List.
6. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this workbook.
7. Click **Schedule** to assign a specific date and time that this e-mail will be sent to the recipient or Click **Send** to immediately send the message

More Actions

From the **More Actions** drop down list in the **Population** Actions bar, you can choose from several additional actions to perform on the current Population List.



Add Selected to New List

This function allows you to add selected members of the current Population List to a new list by creating a new Population List. See the **Create a New Population List** section for more details.

The screenshot shows the 'Create Population List' dialog box. It has a title bar with the text 'Create Population List'. Inside the dialog, there is a 'Name: *' label followed by a text input field. Below this is a 'Description:' label followed by a larger text input field. At the bottom of the dialog, there is a blue button labeled 'Expression Options'. Below the 'Expression Options' button are three buttons: 'Cancel', 'Add Expression', and 'Save'.

Edit Manually Added Profiles

This function allows you to edit the profiles that were manually added to the current Population List. Select the profile you wish to remove from the list and click the **Remove** button.

Search by Last Name

Advanced Search

Displaying 1 row.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Term
Lee	Joshua	S	Jan 01, 199	Malvern	Pennsylvan	19355	Fall 2010

Cancel Remove

Edit Excluded Profiles

This function allows you to edit the profiles that were manually excluded from the current Population List. Click **Restore Profile** to restore the excluded profile to the Population List.

Search by Last Name

Advanced Search

Displaying 1 row.

Last Name	First Name	Middle Name	Birth Date	City	State	Zip	Term
Balas	Charlin	Heather	May 22, 1988	Jeffersonville	Indiana	47133	Fall 2010

Cancel Restore Profile

Calculate List

If you click on Calculate List when an Expression has been defined for your list, it will refresh the list with any new prospects which meet the criteria of the Expression. If the list is manual with no Expression, then no recalculation will occur.

Copy to Clipboard

The Copy to Clipboard feature is one of several options that are available when working with Population Lists. Copy to Clipboard creates a .csv file of the students that can be opened in Microsoft Excel or other software program. Relationship Management will only display 2500 rows of a Population List even if the list is greater than 2500 rows. In addition, only those 2500 rows that display will be copied to the Clipboard.

To copy a list to Clipboard, use the following procedure:

1. Select Population Lists.
2. Select a Population List that is shared, or one that you created.
3. Select Population Profiles to display the Population List.
4. Select **Copy to Clipboard** from **More Actions** on the toolbar.
5. Copy the results to a spreadsheet.

Funnel Status



Funnel Status

Introduction

The Funnel Status is a graphical indicator that shows you at a glance where each prospect is in his or her progress toward becoming an applicant, an admitted, or an enrolled student. Funnel Status indicators have been implemented according to your own institution's definitions, and customized with the rules that determine when and under what circumstances a prospect progresses from one stage to the next. The Funnel Status tracks major milestones and when a prospect has achieved each one.

Funnel Instance

A Funnel Instance is an implementation of a Funnel Model for a particular term and student academic level, used to track the progress of that group of constituents toward enrollment. You can select and view an instance of an active Funnel Model.

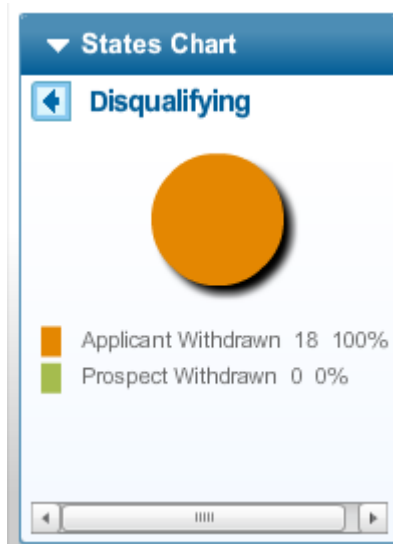
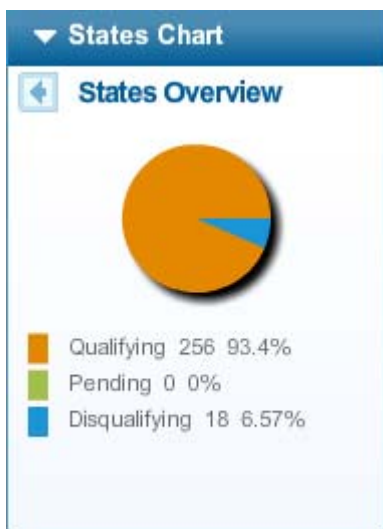
To view a Funnel Instance, click **Funnels** in the Prospects tab navigation panel. This lists all the Funnel Instances in Relationship Management.


Select a Funnel Instance from the list to view the **Instance Summary** information about the particular instance, including its name and description, its status when last executed, and the date of execution.

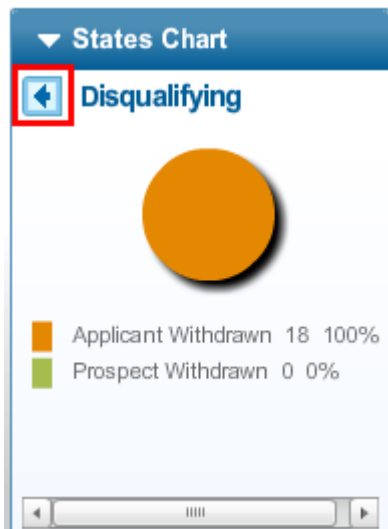
The Funnel Instance has states, and the **States Overview** displays the associated state data -- qualifying, pending, and disqualifying.

Click on the various parts of the pie chart to view more details regarding that particular state.

For example, click on **Disqualifying** or on the blue section of the pie chart. The view changes to:



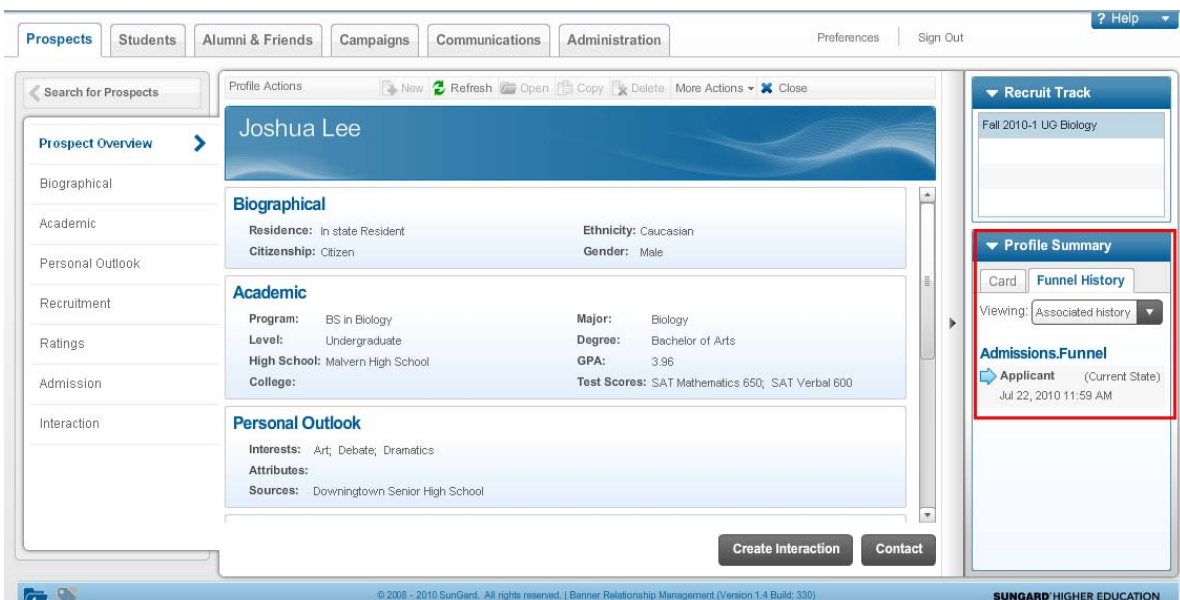
Click on the  arrow to return to the previous view:



Setting up Funnel Models, Funnel States and Funnel Instances is covered in more detail in the Funnels Workbook.

Funnel History

An individual's status in the Funnel is available for viewing in the **Profile Summary** panel under **Funnel History** tab as shown below:



The screenshot shows the SunGard Relationship Management interface. The main panel displays the profile of Joshua Lee, categorized into Biographical, Academic, and Personal Outlook sections. The Biographical section includes Residence (In state Resident), Citizenship (Citizen), Ethnicity (Caucasian), and Gender (Male). The Academic section includes Program (BS in Biology), Level (Undergraduate), High School (Malvern High School), College, Major (Biology), Degree (Bachelor of Arts), GPA (3.96), and Test Scores (SAT Mathematics 650, SAT Verbal 600). The Personal Outlook section includes Interests (Art, Debate, Dramatics), Attributes, and Sources (Downtown Senior High School). The right sidebar contains the Recruit Track and Profile Summary panels. The Profile Summary panel has tabs for Card and Funnel History, with the Funnel History tab selected. Below the tabs, it shows 'Viewing: Associated history' and a section titled 'Admissions.Funnel' with a blue arrow icon, 'Applicant' status, '(Current State)', and a timestamp 'Jul 22, 2010 11:59 AM'. The bottom of the interface shows the SunGard logo and copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 330)'.

Appendix A – Tags



Using Tags

Description

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

Taggable items

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

- Expressions
- Populations
- Templates
- Campaigns
- Interactions

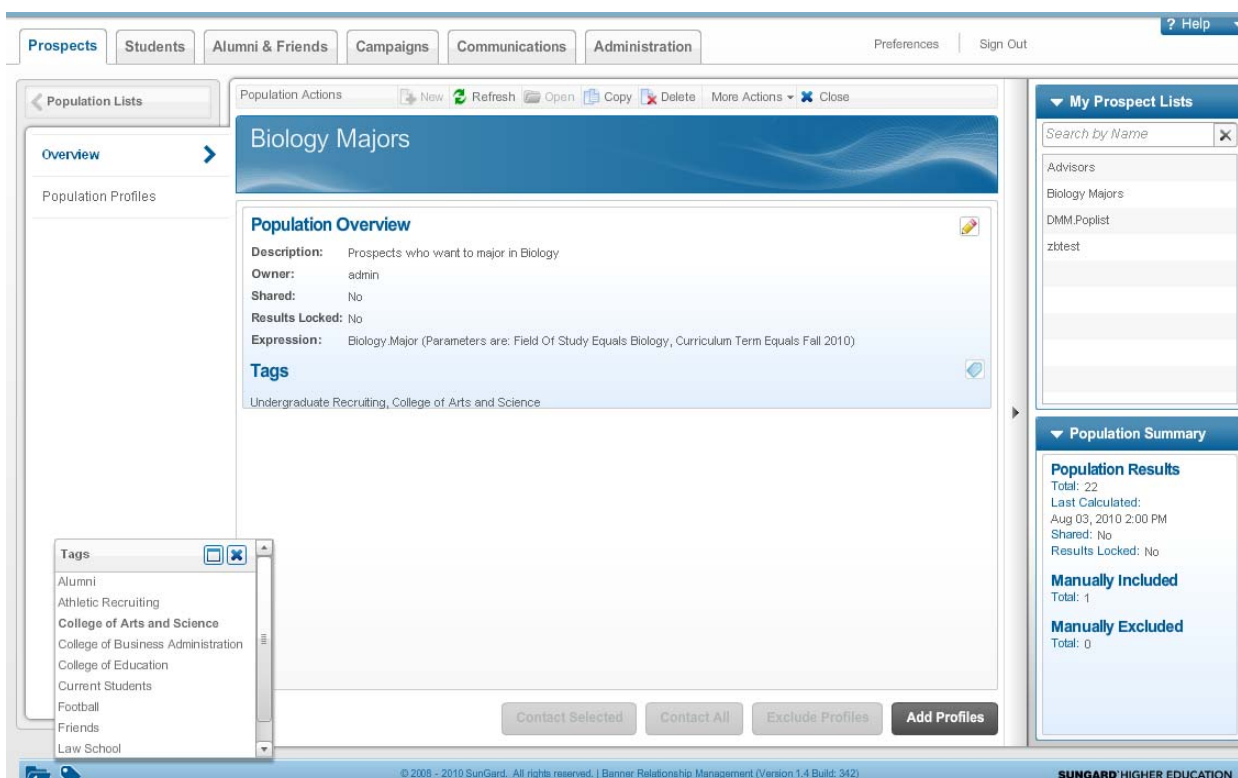
When working with expressions, tags can be incorporated into expression query criteria.

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

Applying a Tag to an Item

Introduction

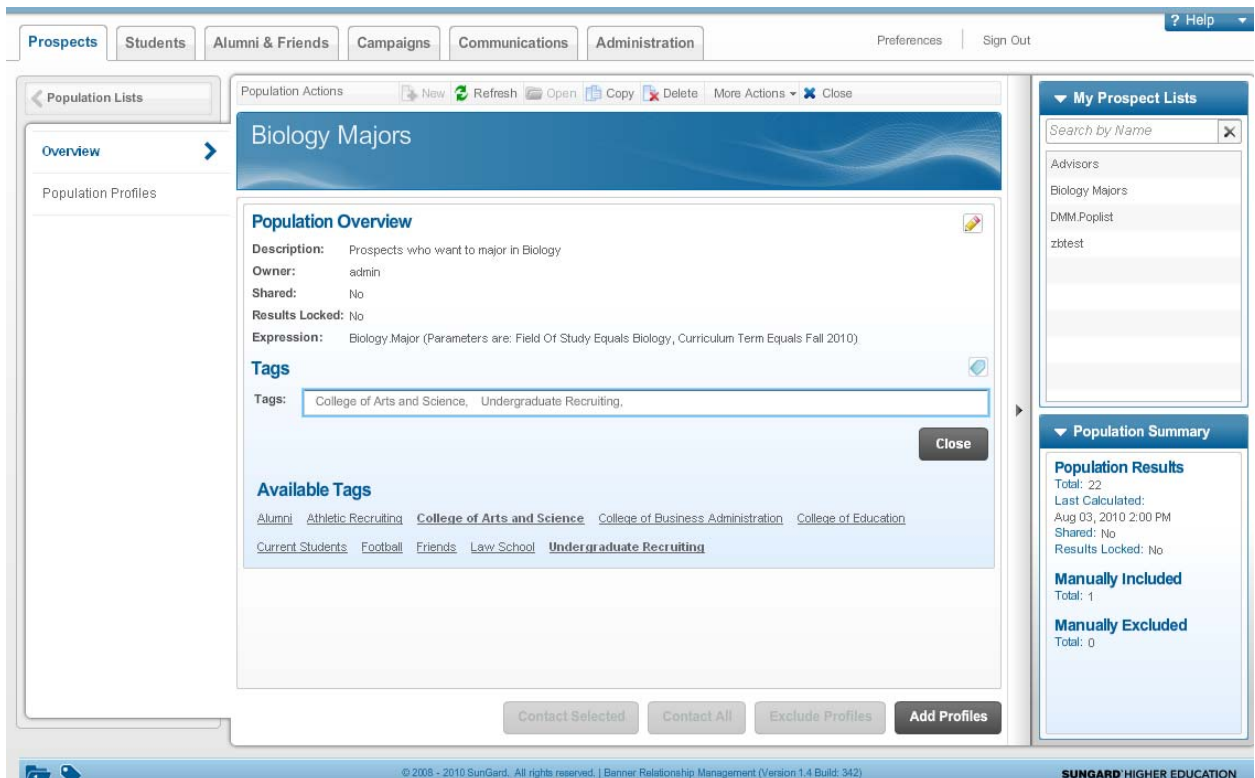
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (🏷️) icon or by clicking the **Add Tags** link on an overview page.



If tags cannot be applied on the current screen, this icon will be grayed out (🏷️).

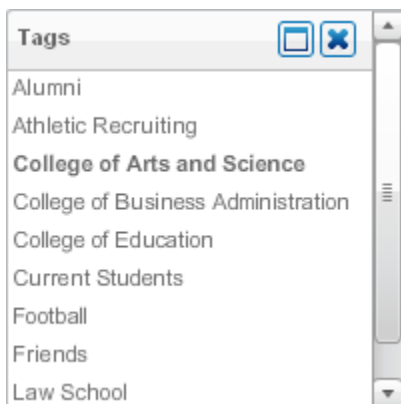
Applying tags from the Tags Display Interface

Double-click a tag to apply it to the current item. Applied tags will be displayed in that item's summary and will appear in the Tags Display in bold, such as **Biology Majors** in the example below. Multiple tags can be applied to an item.



Unapplying tags

To unapply a tag, double-click it. It should change from being bolded to normal case, and it will be removed from the item's summary.



Applying tags using the Available Tags link

You can also apply a tag using the **Add Tags** link on the User Interface. Use the **Tag** icon to open and edit the existing list of tags associated with the entity. If no tags exist, the overview displays the **Add Tag** link. Click the link or the **Tag** icon to add any available tags to the item directly from its overview page.

You can create multiple tags at once; the system adds commas to separate them as you type them in. Click the link to view the list of available tags, begin typing, and the system auto-filters tags as you type.

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 342) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area shows the 'Population Overview' for 'Biology Majors'. The overview includes a description, owner, shared status, results locked status, and expression. Below this is a 'Tags' section with a text input field containing 'College of Arts and Science, Undergraduate Recruiting,' and a 'Close' button. An 'Available Tags' section lists various tags, with 'College of Arts and Science' and 'Undergraduate Recruiting' highlighted. The right sidebar shows 'My Prospect Lists' and 'Population Summary'.

Unapplying tags

To unapply a tag, click on it in the Available Tags list. It should change from being bolded to normal case, and it will be removed from the item's summary.

View Items With A Specific Tag

Introduction

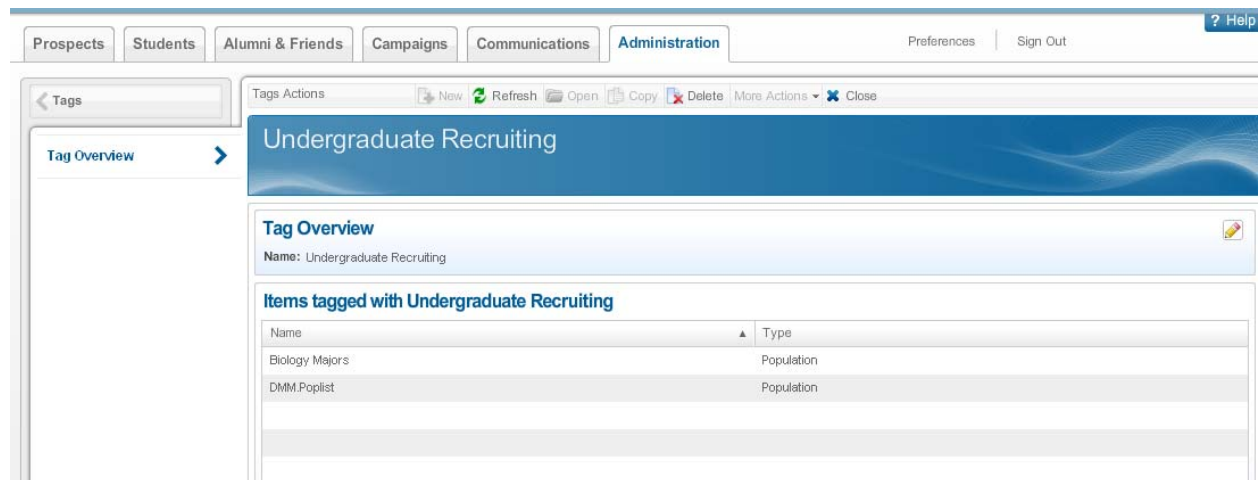
Once a tag has been applied to items in the Relationship Management system, you can use the Tags menu on the Administration tab to view all items to which that tag has been applied.


The screenshot shows the SunGard Relationship Management Administration interface. The 'Administration' tab is selected, and the 'Tags' menu item is highlighted in the left sidebar. The main content area displays a table of tags with columns for Name, Added By, Added Date, and Count of Associations. The table lists various tags such as Alumni, Athletic Recruiting, College of Arts and Science, College of Business Administration, College of Education, Current Students, Football, Friends, Law School, and Undergraduate Recruiting. The 'Undergraduate Recruiting' tag is highlighted in blue. The footer of the interface shows the copyright information: © 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 342) and the SunGard Higher Education logo.

Name	Added By	Added Date	Count of Associations*
Alumni	admin	Aug 03, 2010 1:54 PM	0
Athletic Recruiting	admin	Aug 02, 2010 8:56 AM	0
College of Arts and Science	admin	Aug 03, 2010 1:54 PM	1
College of Business Administration	admin	Aug 03, 2010 1:54 PM	0
College of Education	admin	Aug 03, 2010 1:54 PM	0
Current Students	admin	Aug 03, 2010 1:54 PM	0
Football	admin	Aug 03, 2010 1:54 PM	0
Friends	admin	Aug 03, 2010 1:54 PM	0
Law School	admin	Aug 03, 2010 1:54 PM	0
Undergraduate Recruiting	admin	Aug 02, 2010 8:56 AM	2

Steps

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



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

Search for Tagged Items

Introduction

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

Steps

1. Access a menu that contains searchable items that can be tagged. For this example, click the **Prospects** tab.
2. Click the **Population Lists** link.

The screenshot shows the Relationship Management system interface. At the top, there are tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Prospects tab is selected. Below the tabs, there is a search bar labeled 'Search for Prospects' and a sidebar with links for Population Lists, Interactions, and Funnels. The Population Lists link is highlighted. The main content area displays the 'Population Lists' section with a search bar and a table of lists.

Name	Description	Status	Access	Owner	Creation Date	List Count	Last Calculated
DMM.Poplist		Available	Personal	admin	Aug 02, 2010 8:	0	
zbttest		Available	Personal	admin	Aug 01, 2010 9:	0	
Advisors		Available	Personal	admin	Aug 01, 2010 9:	0	
Biology Majors	Prospects who	Available	Personal	admin	Aug 01, 2010 9:	22	Aug 01, 2010 2:

3. Click **Advanced Search** to call up the advanced search functionality.
4. Select **Tags** from the criteria list.

Population Lists

Search by Name

Select Attribute

- Description
- Name
- Owner
- Shared Access
- Tags

Close Clear Go

Advanced Search

Displaying 4 rows.

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

Select Tags for Search

Available Tags

Search by Name

Advanced Search

Displaying 9 rows.

<input type="checkbox"/>	Name	Added Date	Added By	Tag Count
<input type="checkbox"/>	College of Bu...	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	Friends	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	College of Ed...	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	Current Stud...	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	Football	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	Law School	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	Athletic Recr...	Aug 02, 2010 8	admin	0
<input type="checkbox"/>	Alumni	Aug 03, 2010 1	admin	0
<input type="checkbox"/>	College of Art...	Aug 03, 2010 1	admin	1

Selected Tags

Clear List

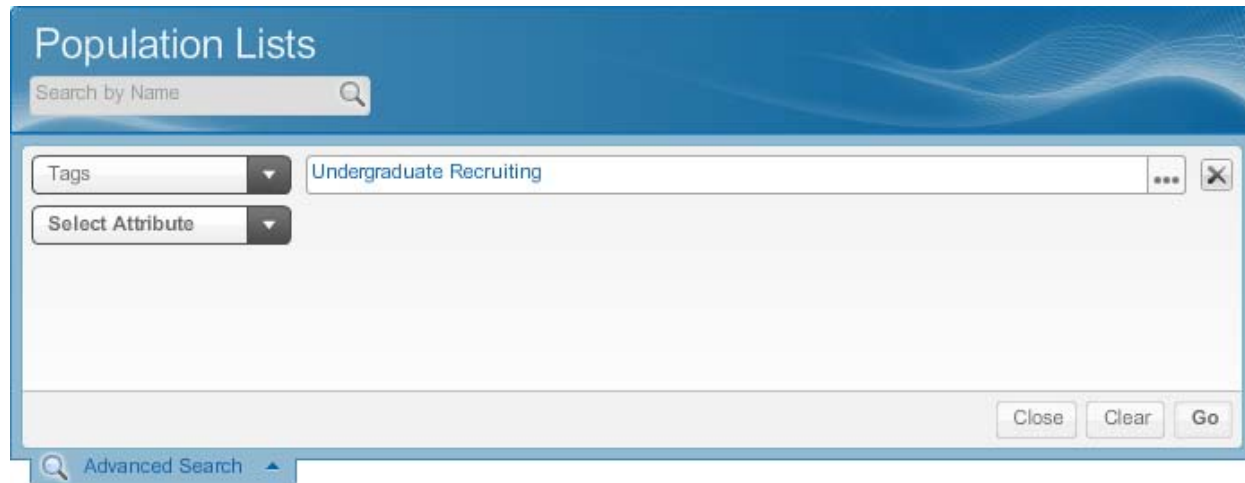
Name	Added Date	Added By	Tag Count
Undergraduate	Aug 02, 2010 8	admin	2

Cancel Select

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

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

The items that contain your criteria will be displayed.



The screenshot shows a web application window titled "Population Lists". At the top, there is a search bar labeled "Search by Name" with a magnifying glass icon. Below this, there are two main sections. The first section has a "Tags" dropdown menu and a text input field containing "Undergraduate Recruiting". The second section has a "Select Attribute" dropdown menu. At the bottom right of the main content area, there are three buttons: "Close", "Clear", and "Go". Below the main content area, there is a link labeled "Advanced Search" with a magnifying glass icon and an upward-pointing arrow.

Appendix B – Population List Settings – More Actions



Population List Settings – More Actions

Population List rules

The success of various functions will depend on a number of factors:

- whether the owner or a user is performing the function
- whether the list is shared
- whether the list is locked

Use the following tables to determine what functions may be performed under varying combinations of these criteria.

Owner performing the function

	Not Shared, Not Locked	Not Shared, Locked	Shared, Not Locked	Shared, Locked
Add selected to new list	Y	Y	Y	Y
Edit manually added profiles	Y	Y	Y	Y
Edit excluded profiles	Y	Y	Y	Y
Recalculate list	Y	N	Y	N
Copy to clipboard	Y	Y	Y	Y

The owner is permitted to lock or unlock a Population List.

User performing the function

	Not Shared, Not Locked	Not Shared, Locked	Shared, Not Locked	Shared, Locked
Add selected to new list	N	N	N	Y
Edit manually added profiles	N	N	N	Y
Edit excluded profiles	N	N	N	Y
Recalculate list	Y	N	Y	N
Copy to clipboard	Y	Y	Y	Y

A User who is not the owner of a Population List may not unlock the list.