

Banner Enrollment Management Suite Relationship Management Campaign Management Training Workbook Level I

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SunGard Higher Education
4 Country View Road
Malvern, Pennsylvania 19355
United States of America
(800) 522 - 4827

Customer Support Center website
<http://connect.sungardhe.com>

Distribution Services e-mail address
distserv@sungardhe.com

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09/02/2008	Revised to support Relationship Management 1.1.
4/3/2009	Revised to support Relationship Management 1.2.
10/9/2009	Revised to support Relationship Management 1.3 (new name and features).
08/13/2010	Revised to support Relationship Management 1.4 (updated screenshots).

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Campaigns



Course goal

Enable recruiting and admissions professionals to understand and successfully use the Campaigns Workspace to define, build, and execute basic campaigns.

Course objectives

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

- describe how Relationship Management supports campaign efforts
- explain the functionality of the Campaigns workspace
- create a campaign definition
- define a campaign model
- build a campaign model and define associated activities
- validate a campaign model
- select a population list
- save a campaign
- start a campaign manually
- schedule a campaign for a future launch date
- view campaign instance status
- monitor campaign effectiveness.

Introduction

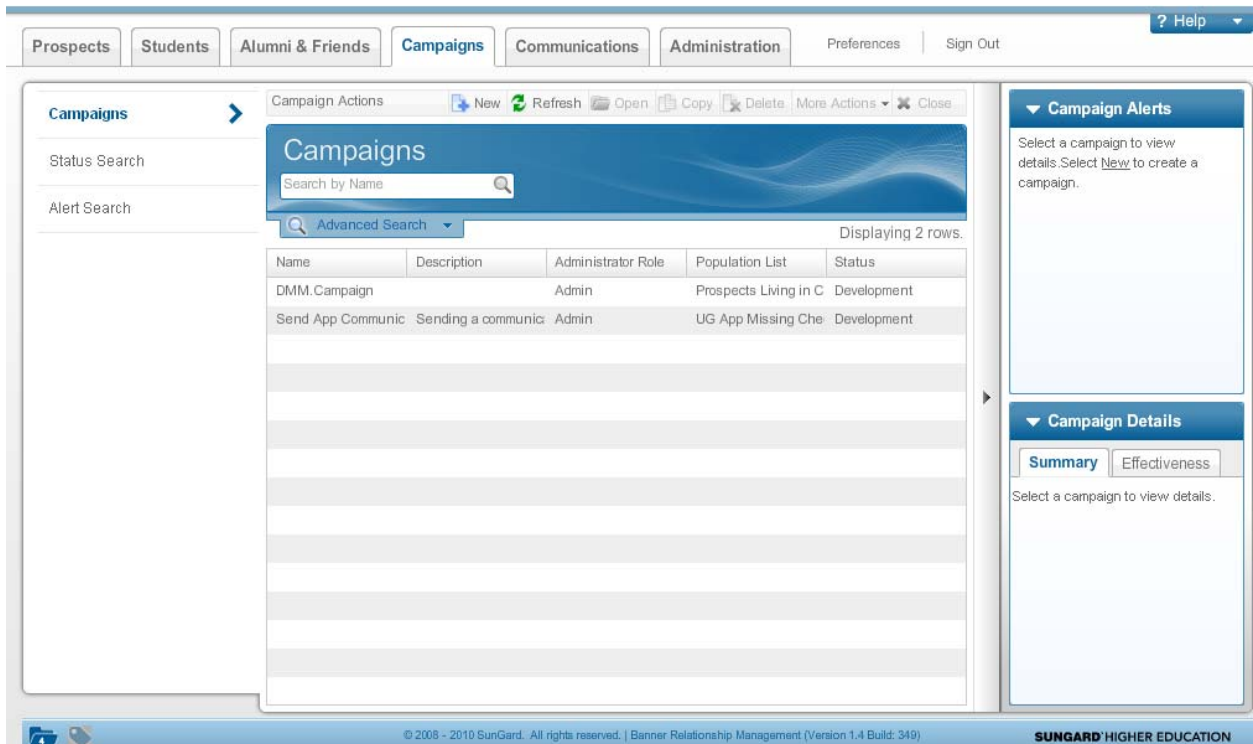
Overview of the Campaigns Workspace

The Campaigns workspace provides powerful targeted support of an institution's communication efforts. An institution can

- design recruiting campaigns based on specific departmental or institutional objectives
- associate pre-defined population lists to each campaign
- manage tasks, alerts, and notifications associated with each campaign
- monitor progress toward completion of campaign activities and track results.

The Campaigns workspace is where an institution can design and execute a chain of communications – usually based on a communication plan - targeted towards a specified population for a specific goal. These communications may be scheduled for distribution over a period of time.

To access the Relationship Management Campaigns workspace, click on the **Campaigns** tab.



The links on the Campaigns workspace make it easy to perform a variety of tasks.

- **Campaigns** – Use this link to create, edit, search for, copy, or delete a campaign (including the campaign definition and the campaign model). Activate a campaign and start or schedule a campaign to launch using this link.
- **Status Search** – Use this link to view the status of a campaign instance, including run time information on the campaign model, activity details, and progress toward completion of the campaign.
- **Alert Search** – Use this link to monitor the progress of a campaign instance, detect any errors in the execution of the activities, and take action to address any alerts.
- **Campaigns Alerts panel** – This panel is available in the right hand sidebar and displays the reason the campaign raised an alert, as well as details on the activity that caused the alert, a description of the alert and potential solutions to resolve the alert.
- **Campaign Details panel** – This panel is available in the right hand sidebar and contains summary information about the campaign, as well as information on the effectiveness of the campaign.

Campaign Defined

A campaign is comprised of individual activities that, when performed, are designed to accomplish a specific goal.

Every campaign contains the following:

- **Campaign Overview:** overview information that identifies the name and purpose of the campaign, the 'owner' of the campaign (campaign administrator), targets of the campaign (population list), and the campaign's effective dates.
- **Campaign Model:** displays the model of the selected campaign. Every campaign requires a campaign model that is created using the campaign modeler. Each campaign model is comprised of various activities that run in a specified order.
- **Population List:** a number of prospective students, or 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. The profiles you add to the list are extracted from the Banner database that is associated with the Relationship Management system.

Note: Once a campaign starts it has a life of its own. Removing a prospect from a population will not terminate the campaign instance.

The screenshot displays the SunGard Banner Relationship Management interface for creating a campaign. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, Administration, Preferences, and Sign Out. A left sidebar shows 'Campaigns' and 'Overview' (selected). The main content area is titled 'Send App Communication' and contains a 'Campaign Overview' section with fields for Description, Status, Administrator Role, Population List, and Campaign Goal. Below this are sections for 'Tags' and 'Recurring Schedule'. At the bottom are 'Activate' and 'Start Campaign' buttons. A right sidebar shows 'Campaign Details' with 'Summary' and 'Effectiveness' tabs, displaying list information and a 'Recalculate List On Launch' checkbox. The footer includes copyright information and the SunGard Higher Education logo.

The right hand screen panel lists the **Campaign Details** which contains summary information about the campaign, as well as information on the effectiveness of the campaign.

A campaign can have one of two possible states:

- **Development** - A campaign is still in the development stage and can be modified.
- **Active** - An active campaign has been validated and can be started. Once a campaign is Active it cannot be modified.

Campaign Composition

Definition + Model + Population = CAMPAIGN

Understanding the Basics



Campaign Overview

Components

Before creating a campaign in Relationship Management, it is important to understand the components to create and execute a successful campaign. The following section will give a description of each section of the campaign.

Campaign Overview Information Screen

The Campaign overview is the foundation of the campaign.

It contains overview information that identifies the name and purpose of the campaign and identifies the campaign administrator, targets of the campaign (population list), and the campaign's effective dates.

Below is an example of the overview information for **INQ 1st Time UG Fall 2008** campaign.

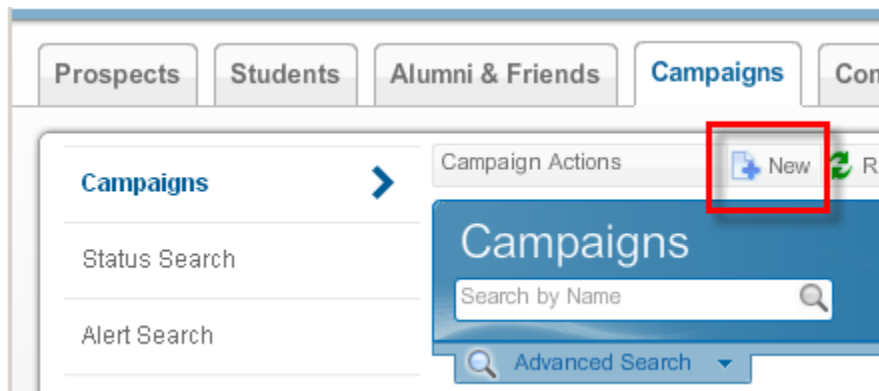
The screenshot displays the 'Campaign Overview' screen within the Banner Relationship Management system. The interface includes a top navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. A 'Campaign Actions' toolbar at the top of the main content area contains buttons for New, Refresh, Open, Copy, Delete, More Actions, and Close. The main content area is titled 'Send App Communication' and features a 'Campaign Overview' section with the following details: Description (Sending a communication to those that applied and a reminder to those that have not), Status (Development), Administrator Role (Admin), Population List (UG App Missing Checklist Item (Prospect)), and Campaign Goal (prospects to apply). Below this are sections for 'Tags' and 'Recurring Schedule' with an 'Add Schedule' link. On the right, the 'Campaign Details' sidebar shows the 'Summary' tab with a list of items, including 'UG App Missing Checklist Item (Prospect)', an initial list count of 50, and a status of Development. A checkbox for 'Recalculate List On Launch' is also present. At the bottom of the main content area are 'Activate' and 'Start Campaign' buttons. The footer of the screen displays the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the 'SUNGARD HIGHER EDUCATION' logo.

A Campaign Overview must be created before a campaign model can be developed and/or executed.

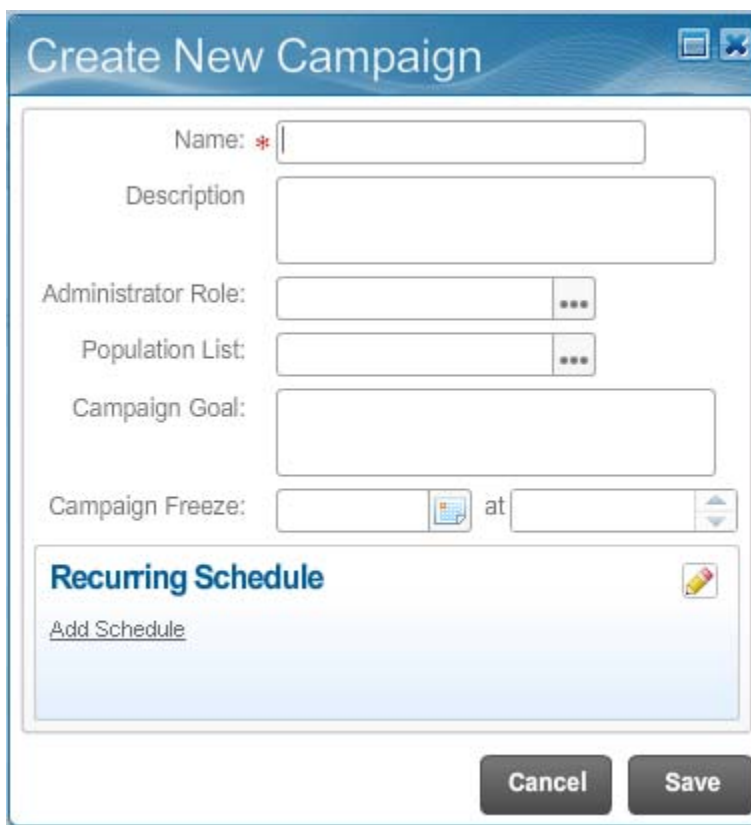
Create and Edit a Campaign

Create a New Campaign

To create a new campaign, click **New** in the Campaigns toolbar.




The **Create New Campaign** window opens.

A screenshot of a 'Create New Campaign' window. The window has a title bar with the text 'Create New Campaign' and standard window controls. Inside the window, there are several input fields: 'Name: *' with a red asterisk indicating a required field, 'Description', 'Administrator Role:' with a dropdown menu, 'Population List:' with a dropdown menu, 'Campaign Goal:', and 'Campaign Freeze:' with a date picker. Below these fields is a section titled 'Recurring Schedule' with a sub-link 'Add Schedule'. At the bottom of the window are two buttons: 'Cancel' and 'Save'.


To create a campaign definition, you only need to complete the **Name** field, but it is recommended that you complete additional information if possible, as this information will assist with the management of campaigns within Relationship Management.

The following are available options:

- Name of the campaign. This field is required and can include spaces. A standardized naming convention should be established and enforced in order to make the system easier to use. See Appendix for more detail.
- Campaign description. This is not required, but it is strongly suggested that it is used to provide additional information about the campaign.
- Administrator role. This is not required to create the campaign, but is required to activate a campaign. The Administrator role is used to grant or deny editing access to a campaign. Click on the 'look up' icon  to open the Role Search dialog box. Click on the appropriate role.

Note: Only the role specified in this field will be able to take action on alert notifications related to this campaign.

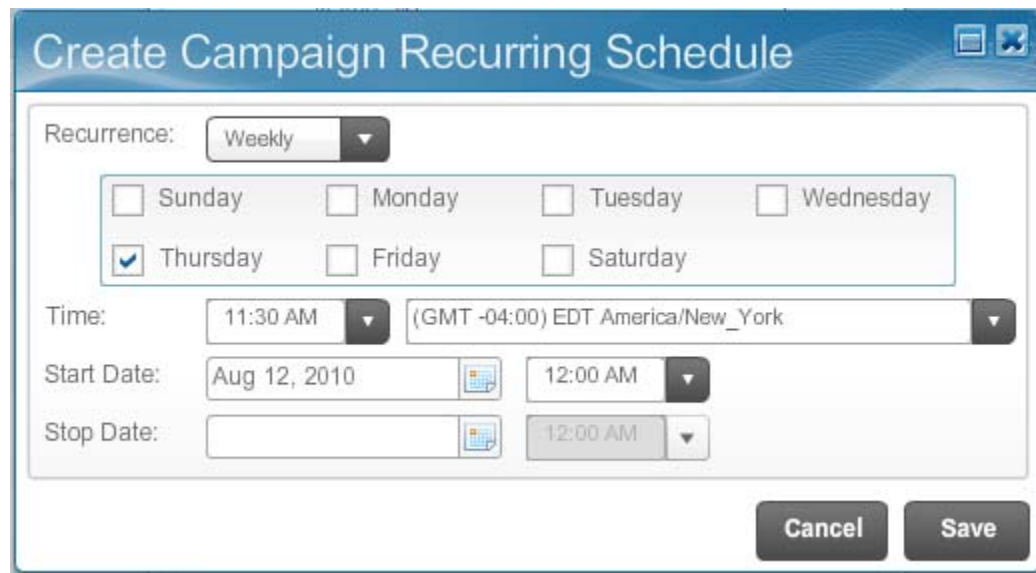
- Population list. Select a population list to serve as the target of a campaign. This is not required at this time, but is required once the campaign status is changed to *Active*. The population list can be associated with the campaign and/or modified up until that time.

Click the 'look up'  to open the Population Lookup dialog box. Click on the appropriate population list.

Note: You may only select a population list from the Campaigns Workspace. If you need to create an expression and save as a population list, refer to the Administration workspace. If you need to view or modify a list, do so via the Profile Management workspace.

- Campaign Goal. The desired result of the campaign. This is not required but will assist with management of all campaigns and for measuring whether a campaign has achieved its objectives.
- Campaign Freeze. This is only used when you wish to suspend the adding of prospects to your campaign. You would only freeze a campaign if you had defined a schedule for it.
 - Entering a date places a temporary suspend on the campaign so that no prospects will be added to the campaign as of the freeze date.
 - Deleting the freeze date removes the freeze.

- Recurring Schedule. This is an option. You do not have to set up a schedule for a campaign that is a “once only” campaign. Click the box next to the statement “This campaign has a recurring schedule”. This will open the box where you will define the schedule.
 - When you click “Daily”, the days of the week are disabled.
 - When you click “Weekly” the days of the week are enabled so that you can choose which days of the week you choose to recalculate and add new prospects to the campaign.
 - Enter the appropriate information in the remaining fields.



The image shows a dialog box titled "Create Campaign Recurring Schedule". It contains the following fields and controls:


- Recurrence:** A dropdown menu set to "Weekly".
- Days of the Week:** A grid of checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Thursday is checked.
- Time:** A dropdown menu set to "11:30 AM" and a text field showing "(GMT -04:00) EDT America/New_York".
- Start Date:** A text field set to "Aug 12, 2010" with a calendar icon.
- Stop Date:** A text field that is empty with a calendar icon.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Click the **Save** button. You have successfully created a new Campaign overview.

Edit an Existing Campaign

Perform the following steps to edit an existing campaign that has a status of Development .

Note: You cannot edit a campaign with an Active status. An exception to this is adding a schedule to a running campaign.

1. Search for and open the campaign that you would like to edit.
2. Click Edit  to modify the campaign details.
3. Edit the information using the same steps as creating a new campaign.
4. Click Save to store any changes.

Adding Prospects to a Running Campaign

Recruiting & Admissions Relationships now provides the ability to add selected prospects to a running campaign dynamically. You can schedule a recurring time for expressions and populations to be re-evaluated, and add at that time all new qualifying prospects to running campaigns. You can also add a specific individual prospect individually by adding him or her to the population list attached to the campaign.

You can make changes regardless of what state the campaign is in at the time -- schedule and end dates are decoupled from the state of the campaign.

- Campaigns can be set up with a recurring schedule to fire and gather all new prospects that qualify under the population list expression.
- Campaigns can also be manually refreshed to poll for new prospects to be added to the population list
- Campaigns can be “frozen”
 - Places a temporary suspend on the campaign so that no prospects will be added to the campaign as of the freeze date
 - Deleting the freeze date removes the freeze

Note: If you create a new campaign by selecting **New** on the Actions toolbar, the system creates a new campaign with the Recurring Schedule option closed. If you copy a selected campaign, the copy will contain the same specifications as the original campaign, with all its attributes including all the recurring schedule data, the schedule value and campaign end date.

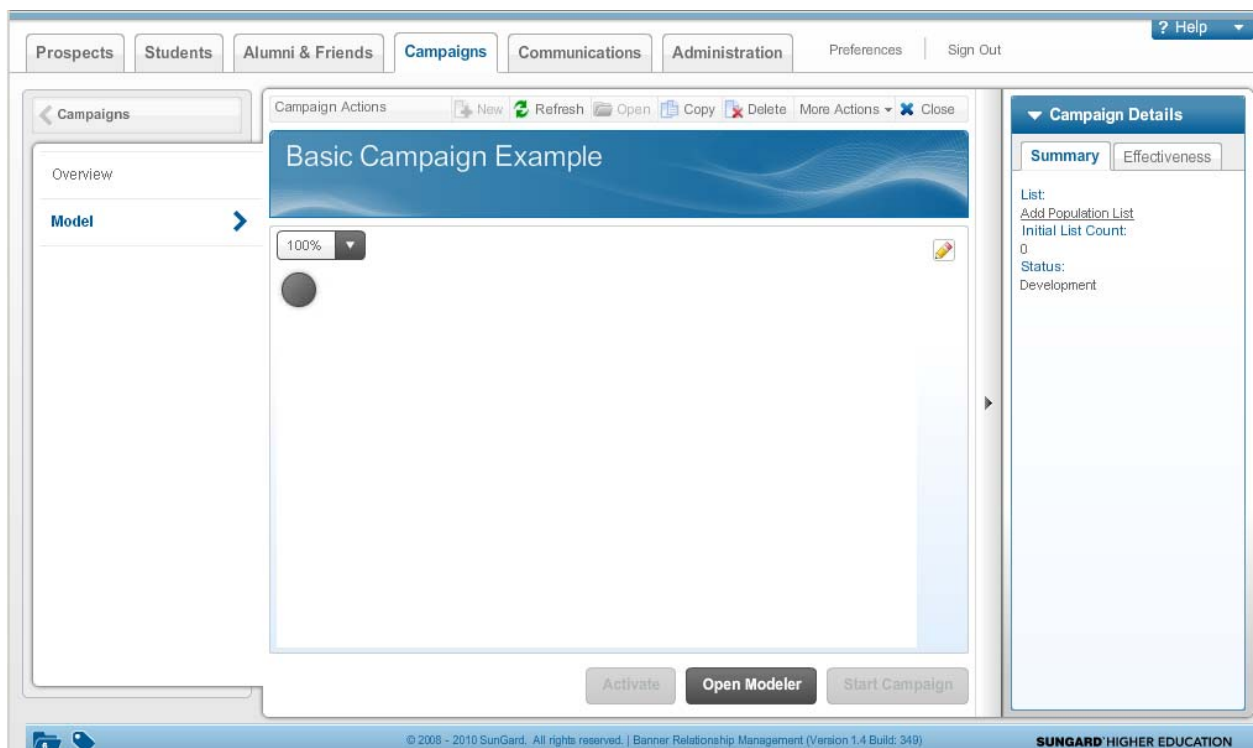
Campaign Modeler

Campaign Model Overview

Once a campaign definition has been created, a blank campaign model automatically associates to the saved campaign definition.

The Campaign Model is a graphic representing the flow of activities in a campaign.

The view below shows a completely blank campaign model.



Every campaign must be associated with a campaign model.

Each campaign model can be comprised of various activities that run in a specified order. A model is created using the **Campaign Modeler tool**.

Campaign Modeler

The model for a campaign is created using the campaign modeler, which will help you graphically design and automate campaign processes based on specific departmental or institutional objectives.

This workbook focuses on simple campaign models. (For information regarding complex models please refer to the Level II workbook).

Open the modeler

To open the modeler tool, click the *Open Modeler* button at the bottom of the Campaign Model screen.

The modeler uses Java™ software which must start before the modeler will open. This is indicated by a temporary popup window.



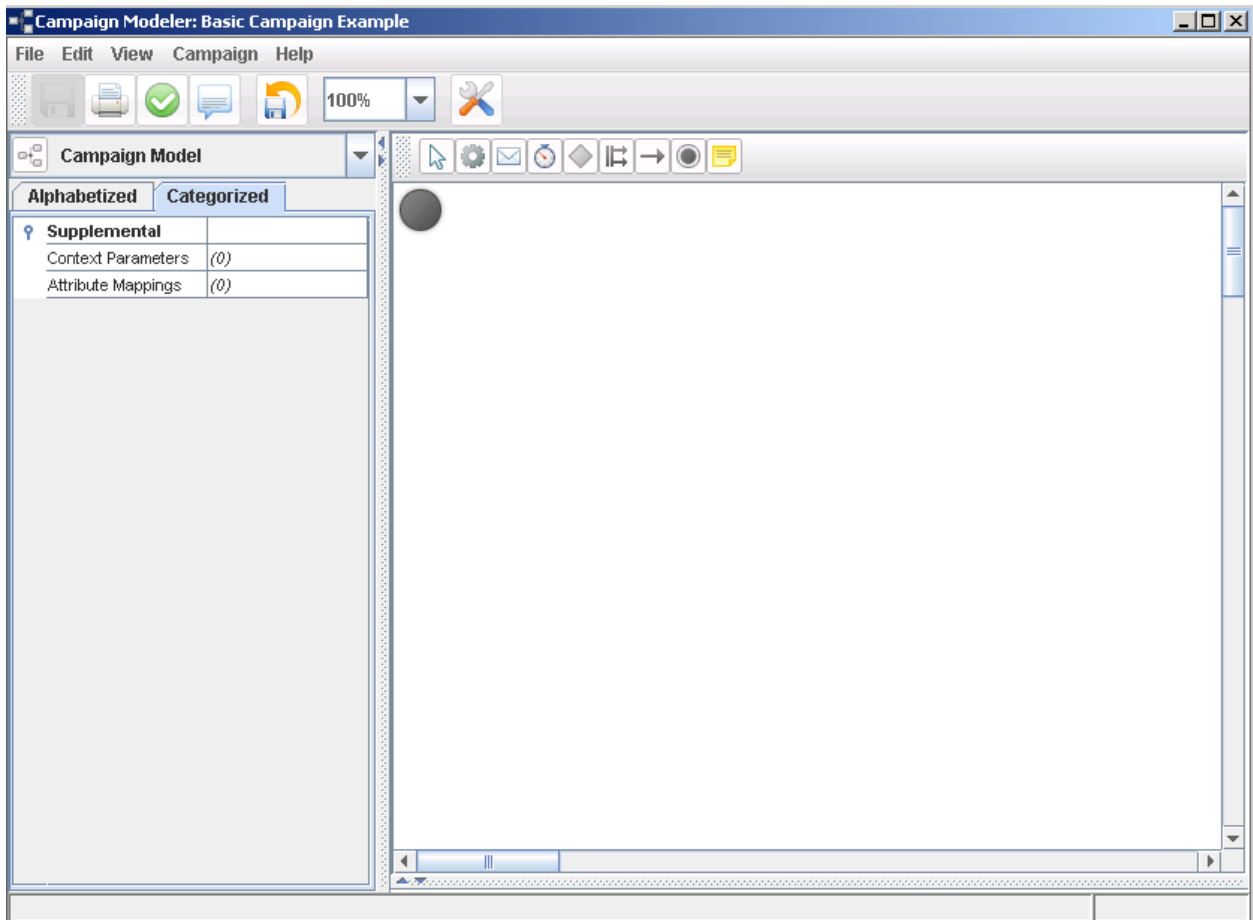
The popup window you see may vary slightly depending on the version of Java you have installed.

The modeler tool opens in a separate window from the Relationship Management Workspace window. This may take a few moments, please be patient.

If the modeler does not appear in front of the Relationship Management workspace, look at the Windows toolbar and click on the window tab **Campaign Modeler** to enlarge the screen.



The following is a view of a blank Campaign Modeler for the campaign called **Basic Campaign Example**:



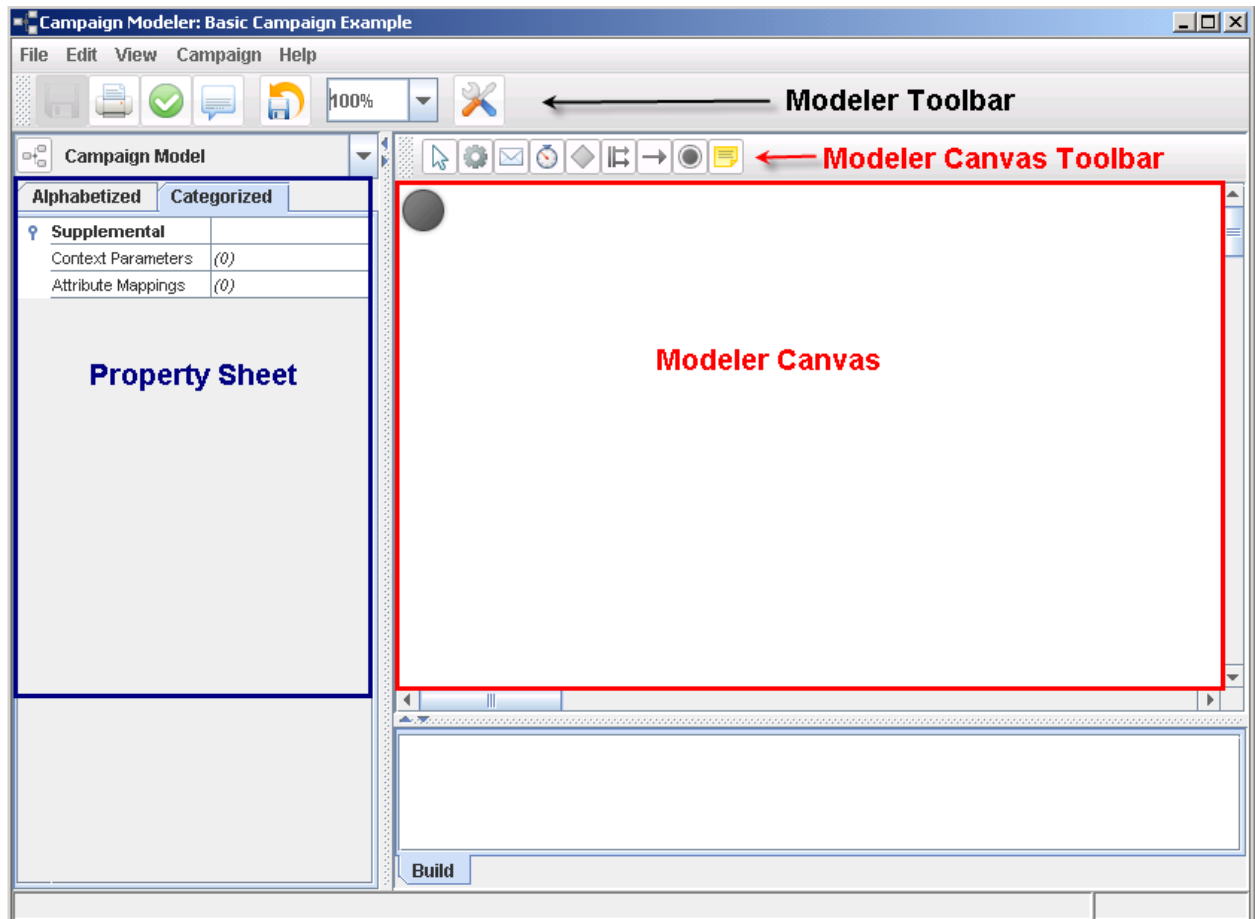
We will begin by looking at the various components of the Campaign Modeler.

Campaign Modeler Basics

The basic components of the Campaign Modeler are as follows:

- **Modeler canvas** – The modeler canvas is the *drawing* area where you build your campaigns.
- **Property sheets** – The property sheet allows you to set specific information about the campaign and campaign objects, using parameters.

Both components are required for a campaign. This workbook will begin by introducing the visual side of the campaign. Then we will explore how to create the rules and parameters for a campaign using the property sheet.



Modeler Toolbar – toolbar contains commands for the entire modeler. The Campaign Modeler Toolbar contains the following tools that are used to manipulate campaign models.



Save – Saves the campaign model.



Print – Prints the campaign model to a printer or save the model as a PDF file.



Validate - Checks the syntax of a campaign model.



View/Hide Messages - Display or hide the message window at the bottom of the Campaign Modeler



Revert - Revert to the last saved version of the campaign model. Any changes to the model since the last time it was saved will be lost.



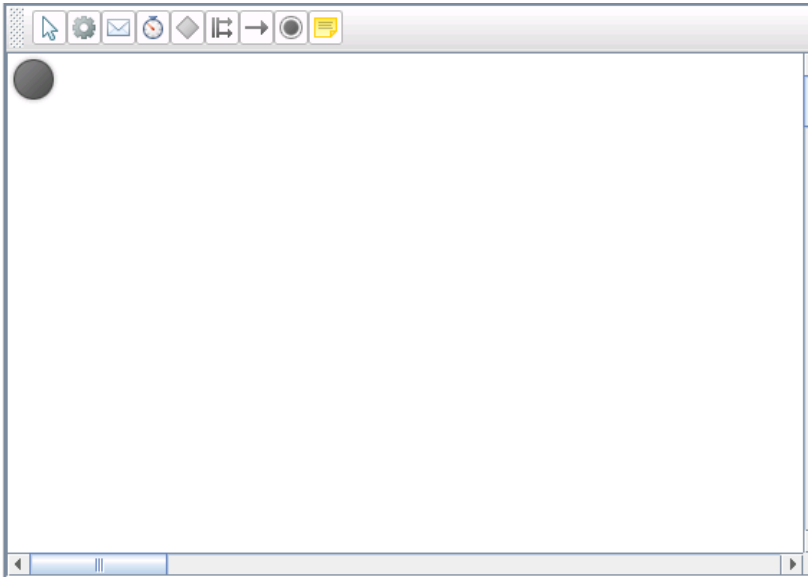
Zoom - Shrink or expand the view of the campaign model.



Context Parameters - Open the Context Parameter window. Campaign context parameters are a set of parameters that apply throughout a campaign. They establish the context within which the campaign will run.











Campaign Modeler canvas

One of the first steps in creating a campaign model is to draw the process flow. Basically, you “draw” campaign models on the drawing canvas using the objects from the Modeler Canvas toolbar.




Campaign Modeler Canvas Toolbar

The Campaign Modeler Canvas Toolbar contains the following objects that are used to develop campaign models:



 Start - Indicate the beginning of a campaign process. Note: The Start icon appears automatically when Campaign Modeler is launched.	 Selector - Select objects on the drawing canvas.
 Rule Activity - Place a rule activity in the drawing area. A rule activity allows for selection of a rule via a URI component and uses the returned value to determine process direction (based on guard conditions).	 Multi-channel communication (MCC) Activity - Place a MCC activity in the drawing area. MCC activities communicate with a prospect via emails, letters, or targeted announcements. MCC activities are associated with Templates built in the Communications module.
 Timer Activity - Place a timer activity in the drawing area. Timer activities are used to set pre-defined dates/times into campaigns.	 Decisions - Place a decision box in the drawing area. Decisions are used to show choices along a path of action.
 Parallel activity - Place parallels, which are used to create parallel paths, between activities. Activities within the parallel paths can occur simultaneously and independently of each other.	 Transition - Place transitions in the drawing area. Transitions represent the flow of work. All objects in the model must be connected.
 Stop - Place a stop object in the drawing area. Each campaign must have at least one stop to indicate the work is complete. Processes can have more than one stop.	 Notes - Place comments about an object in the drawing area. Notes are viewable by everyone.


Activity Types

A campaign may contain the following activity types:

-  **Multi-channel communication (MCC) Activity** – The MCC activities use communication templates to send a large number of similarly formatted communications to a group of individuals. MCC activities associate with communication templates created in the Communications workspace. Ideally, you will create your communication template prior to creating your campaign model. Then, when you draw your campaign model, you can associate the correct communication template to the MCC activity.

When the campaign status is changed to Active, the activation will validate that the communication template is public and published; however it will NOT validate the effective dates and active flag for the chosen template.

-  **Timer Activity** - The timer activity allows a campaign designer to pause the campaign for a specific duration of hours, days, and minutes, or to pause the campaign until a specified date and time has occurred.
-  **Rule Activity** –The rule can be used in transitions to determine which path should be followed in the campaign. Rule Activity will be covered in greater detail in Campaigns Level II workbook.

These activities are “drawn” into the campaigns using the methods described below and connected using transitions .


Transitions

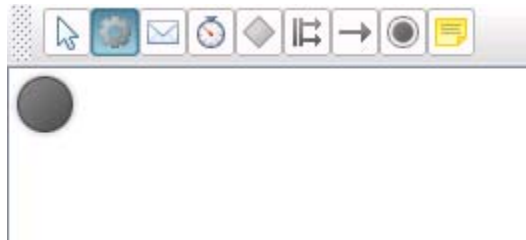
A transition is a line that connects activities, decisions, parallels, as well as the start and stop objects. Transitions show the process flow for the campaign.

Working in the Campaign Modeler Canvas

Add an object to the canvas

To add an activity to the canvas:

1. Click the appropriate activity icon in the Campaign Modeler Canvas Toolbar. In this example, we selected the Rule Activity  icon.




2. Click on the white space in the Modeler Canvas to place the activity.

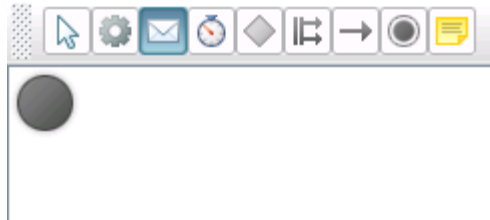


You have successfully added an activity to the modeler canvas.

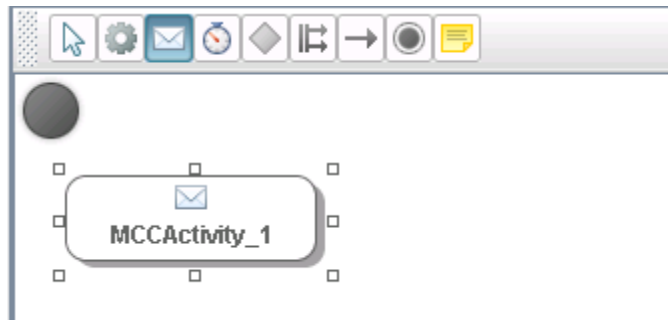
Add multiple objects to the modeler canvas

To add multiple activities of the same type to the canvas:

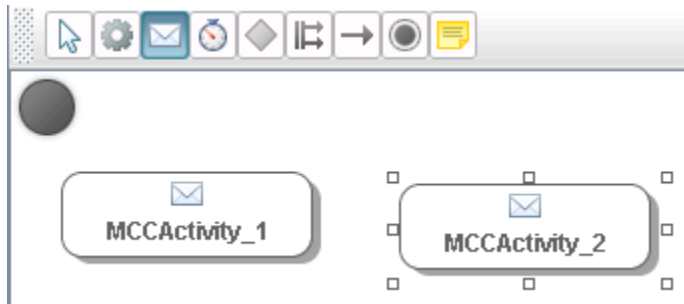
1. Double-click the appropriate activity icon in the Campaign Modeler Canvas Toolbar. In this example we selected the MCC Activity  icon.



2. Click on the desired location on the Modeler Canvas to place the activity.




3. Click on the desired location on the Modeler Canvas to place additional activities of the same type on the canvas.

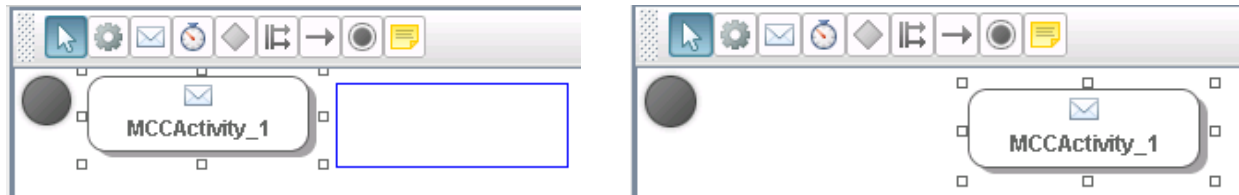


4. When finished, select the Selector tool  to turn off the add activities feature.

You have successfully added multiple activities to the modeler canvas.


Arrange objects

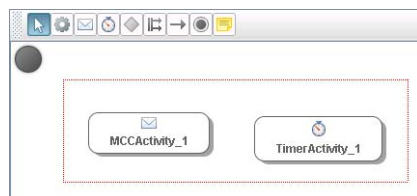
To move an object on the screen, select the Selector tool , then select the object on the canvas and drag to the new location.



Copy or cut objects on the modeler canvas

To copy or cut objects on the modeler canvas:

1. Select the Selector tool .
2. Click a blank area of the modeler canvas, hold the mouse button down, and select the objects on the canvas that you wish to copy or cut (this action will draw a red box around the objects that you select).



or

Hold down the Shift key and use the selector tool to click each canvas object you would like to copy.

Note: Transitions will not be automatically selected when copying or cutting canvas objects. To copy transitions, hold down the Shift key and select each transition you would like to copy or cut.

3. To copy the selected canvas objects, select Edit → Copy from the window menu bar or press CTRL-C on the keyboard.
4. To cut the select canvas objects, select Edit → Cut from the window menu bar or press CTRL-X on the keyboard.


You can also right click on your mouse and select copy or cut from the drop

down menu.

The canvas objects you copy or cut will be stored on the Clipboard until another copy or cut is performed.

Paste objects to the modeler canvas

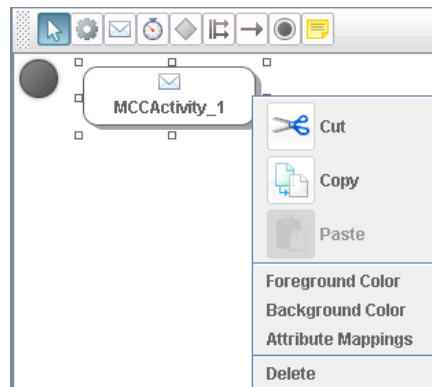
To paste objects to the modeler canvas:

1. To paste objects from the clipboard, select Edit>Paste from the window menu bar or press CTRL-V on the keyboard. You can also right click on your mouse and select paste from the drop down menu.
2. Select the Selector tool .
3. To ensure that your campaign model is easy to read and understand, place all pasted objects in the appropriate location by moving those objects into the proper place to create a logical process flow.

Assign a color to an Object

To assign a background or foreground color to an activity:

1. Select the object and right-click on the mouse.
2. Select Background Color or Foreground Color.



3. You have three options for selecting a color for an activity:
 - Swatches - select an existing color from the grid of color swatches.
 - HSB - enter a value from (0 to 359) for Hue, (0 to 100) for Saturation and (0 to 100) for Brightness. Hue refers to color, Saturation refers to the intensity of the color, and Brightness determines how bright or dull a color is displayed.
 - RGB - enter a value from (0 to 255) for Red, (0 to 255) for Green and (0 to 255) for Blue. By combining the three primary colors, you can create a specific color shade for an activity.



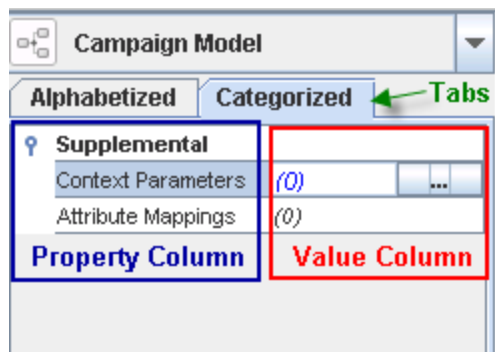
4. Click OK.

You can also select a background or foreground color by selecting an object on the canvas, then choosing a color in the property sheet menu – in the areas noted as Background Color and Foreground Color.

Property Sheets

Property Sheets

A property sheet is where you set specific information about the campaign and objects within a campaign, using parameters. The property sheet is, in essence, the “brain” for the campaign model.



Property sheets contain two columns:

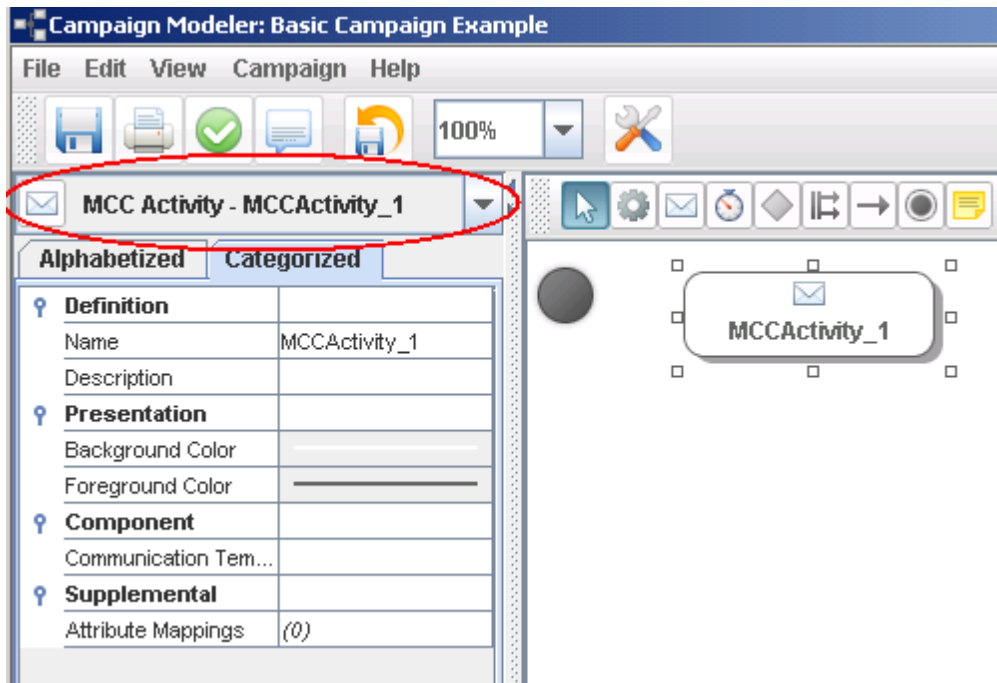
- **Property column** – Displays the name of the fields. This information can not be changed.
- **Value column** – Displays either the default value or the specific values that should be used for the campaign model and activities. This information can be edited by the user.

Property sheets can be displayed either by category or alphabetically.

- **Categorized tab** – By default, with the Categorized tab selected, the property sheet will display properties that are organized into specific categories, allowing related properties to be displayed together.
- **Alphabetized tab** – This tab will display all properties in alphabetical order regardless of the category that the individual property belongs to.

Each object in a canvas has an individual property sheet, as does the campaign model itself. For the purposes of this basic campaigns workbook, we will only look at the MCC and Timer Activities. The more complex property sheet functionalities are covered in Campaigns Workbook Level II.

To view the properties for another area of the campaign, either click on the object in the canvas, or you can select from the list above the Property Sheet. Below is the view of **MCCActivity_1**.



MCC Activity Property Sheet

The MCC activity section includes property fields for the following Components:

Name – The activity name is required and can be edited. The name **cannot** include spaces.

Description - The description is optional and can be edited. The description can include spaces.

Background and Foreground Colors – Colors are not required for activities but can be edited if desired.

Communication Template - This field is used to search for and select a Communication Template from the Communication Workspace in Relationship Management.

Attribute Mappings - Campaign attribute mappings can be used to map campaign specific data to a context parameter that can be used throughout the campaign.

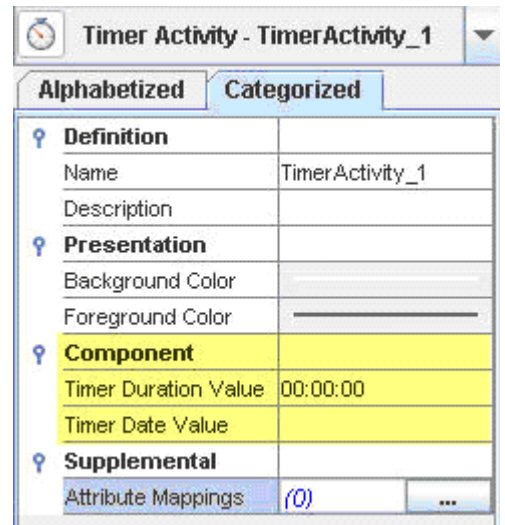
The screenshot shows the 'MCC Activity - MCCActivity_1' property sheet. The 'Alphabetized' tab is active, showing a table with sections: Definition (Name: MCCActivity_1, Description:), Presentation (Background Color, Foreground Color), Component (Communication Tem...), and Supplemental (Attribute Mappings: (0)). The 'Communication Tem...' field has a dropdown menu and a search button.

Timer Activity Property Sheet

The **Timer Activity** menu is similar to the MCC Activity menu except for the Components section which includes:

Timer Duration Value - This field is used to set the Estimated Time window. You can enter the number of days, hours, and minutes to hold the campaign.

Timer Date Value – This field opens a calendar window to select a specific date and time, and the campaign will be held until that date and time is reached.

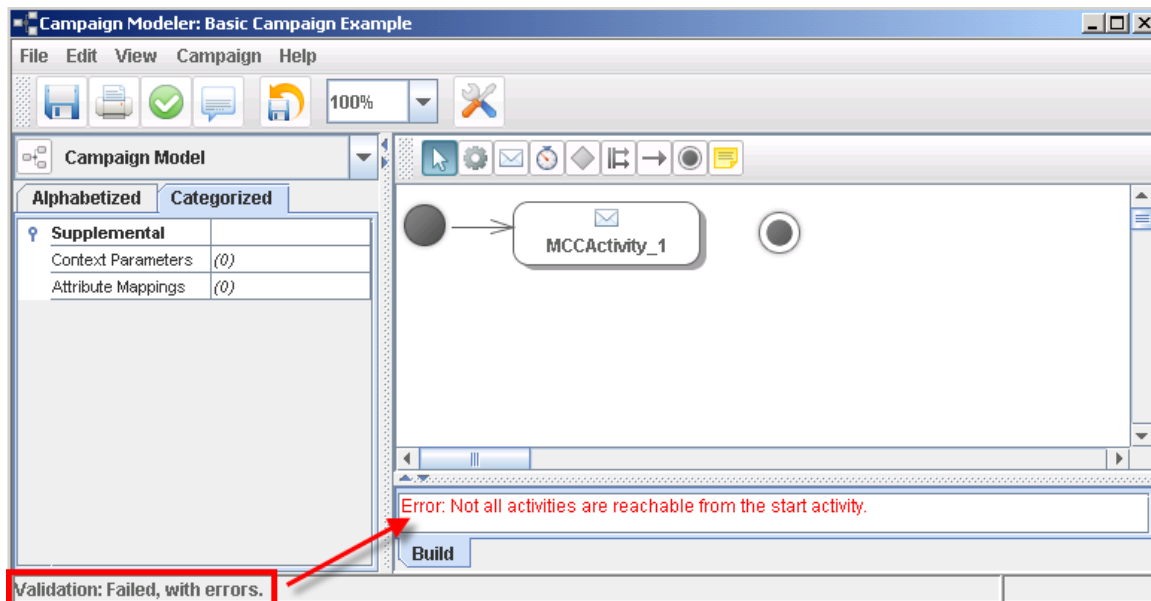


Timer Activity - TimerActivity_1	
Alphabetized Categorized	
Definition	
Name	TimerActivity_1
Description	
Presentation	
Background Color	
Foreground Color	
Component	
Timer Duration Value	00:00:00
Timer Date Value	
Supplemental	
Attribute Mappings	(0) ...

Validate a Campaign

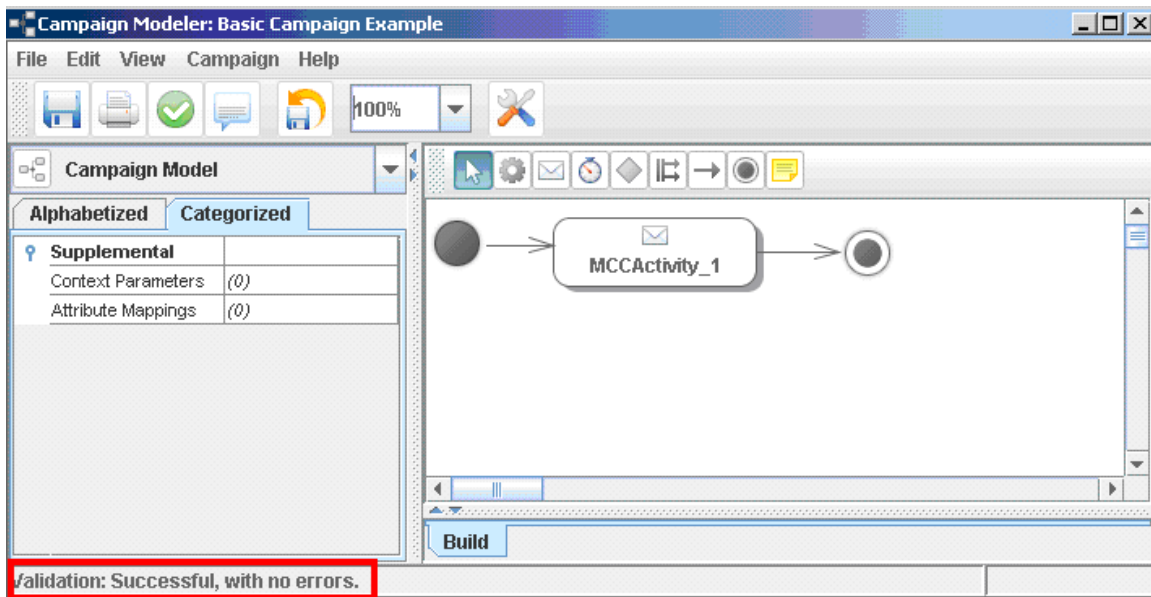
Once the campaign model is built and the model and all activities are defined, you can validate your campaign model to ensure your process syntax is correct.

If the validation is not successful and errors are found in the structure of the campaign model, the Build tab will open below the drawing canvas. A message for each error found in the model is displayed in the tab.



You must correct these errors, and then validate the campaign again before you can activate and use the campaign. Double-click on the error message to highlight the specific activity or transition that contains the error.

If the validation is successful and no errors are found in the structure of the campaign model, you will see the following confirmation message: Validation: Successful, with no errors.



Putting It All Together



Build a Basic Campaign Model

Introduction




Now that the various pieces of the Campaign Modeler tool have been defined, we will look at a demonstration of how the pieces fit together to form a **basic** campaign model.

The example will show how to create a campaign model that includes the following communications:

- The email invitation, **INQ Portal Invite EML**, which invites a Prospect defined as an 'inquiry' to create an account in the Prospective Student Portal.
- A targeted announcement, **INQ Plan Campus Visit TA**, asking the inquiry to plan a visit to the campus.

The targeted announcement will be sent two weeks after the email invitation.

The following objects will need to be included in the campaign model:

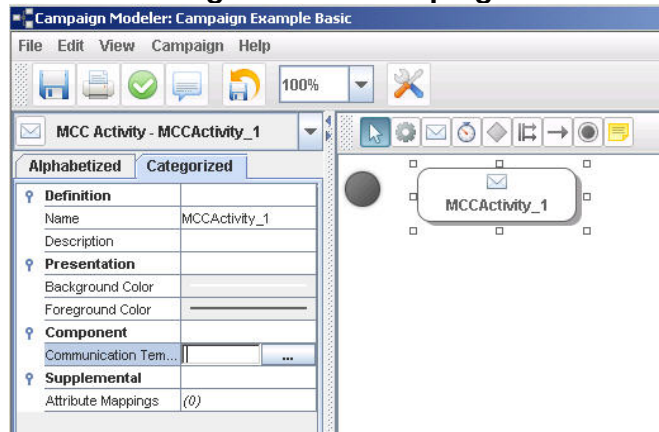
-  MCC Activity for the template **INQ Portal Invite EML**
-  Timer Activity for two week waiting period
-  MCC Activity for **INQ Plan Campus Visit TA**


The Campaign name is **Campaign Example Basic**.

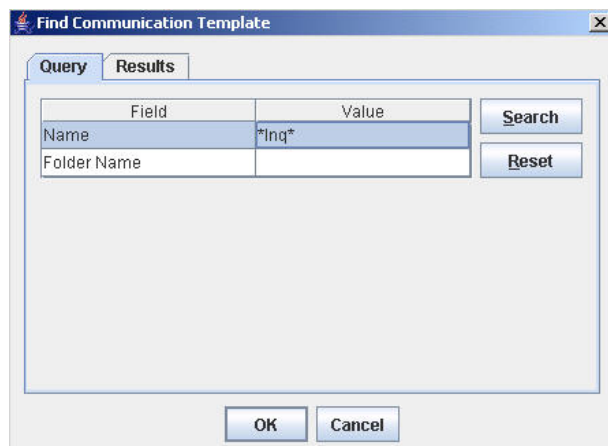
Note: Appendix A includes recommended planning activities which are of more assistance during complex campaign design.

MCC Activity

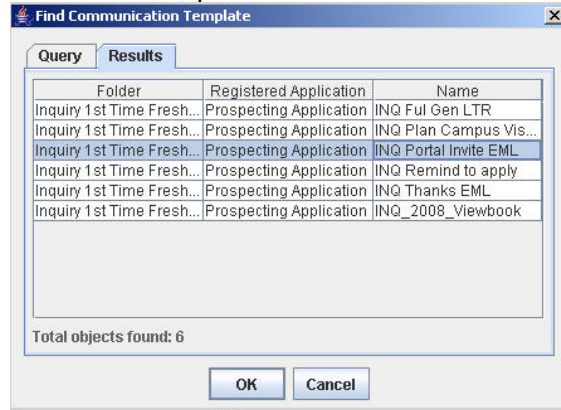
1. Add an MCC Activity object to the canvas. (Instructions can be found in the section **Working with the Campaign Modeler Canvas**).



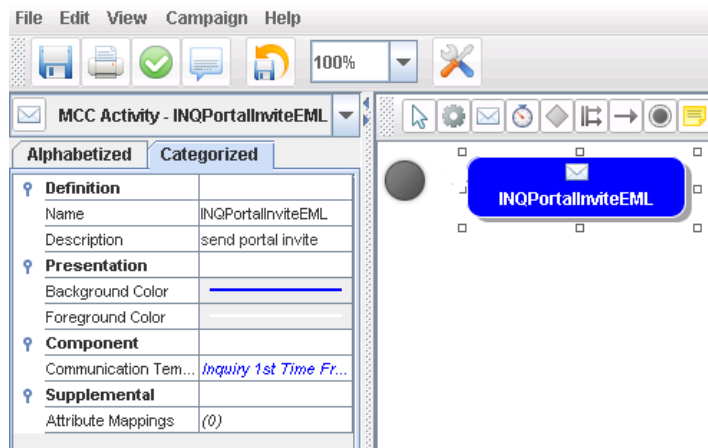
2. The **Name**, add a **Description** and alter the **Background Color** and **Foreground Color** should be edited. It is often helpful to name the MCC Activity the same name as the Communication Template it refers to.
3. Next, associate the template **INQ Portal Invite EML** to the MCCActivity by clicking the search icon  to locate the **Communication Template**.
4. The **Find Communication Template** window opens. Either type information into the search fields and click search, or just click the search button to retrieve a list of all the templates. This example uses wildcards to search for any communication with the letter combination "inq".



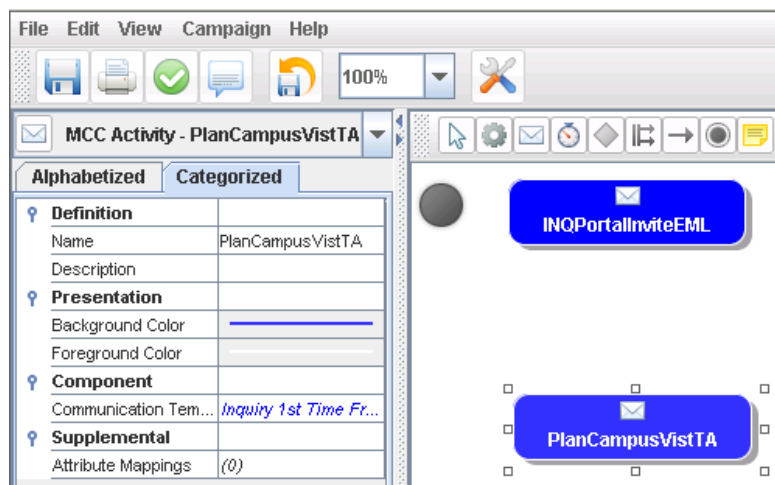
5. Select the template from the list and click OK.



6. The first MCCActivity has been successfully completed and the Communications template is tied to the activity.




7. The process is duplicated for the second MCCActivity:

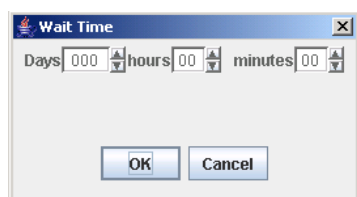


The MCCActivities have been successfully added to the campaign.


Timer Activity

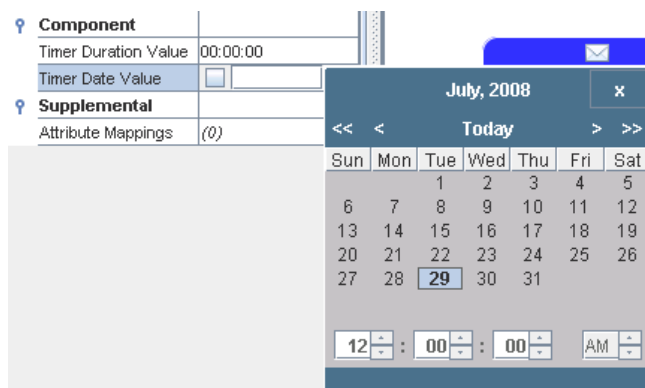
To add a timer activity to a campaign:

1. Add a Timer Activity to the canvas. (Instructions can be found in the section **Working with the Campaign Modeler Canvas**).
2. The **Name**, add a **Description** and alter the **Background Color** and **Foreground Color** can be edited if desired.
3. Click on the search icon  to open the Estimated Time window.

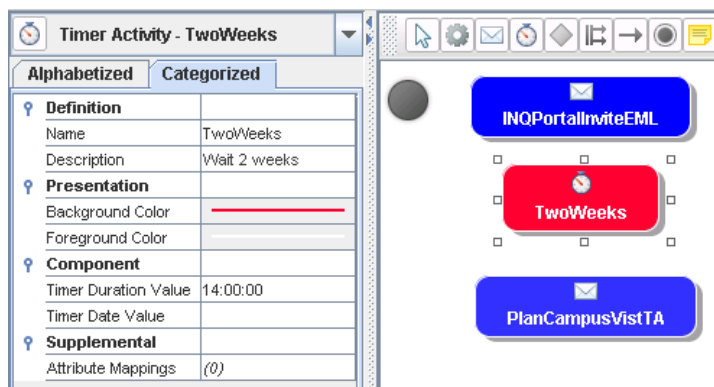


Or

Click on the calendar icon  on the right side of the Timer Date Value field to open the Calendar window. Select a specific date and time and the campaign will be held until that date and time is reached.




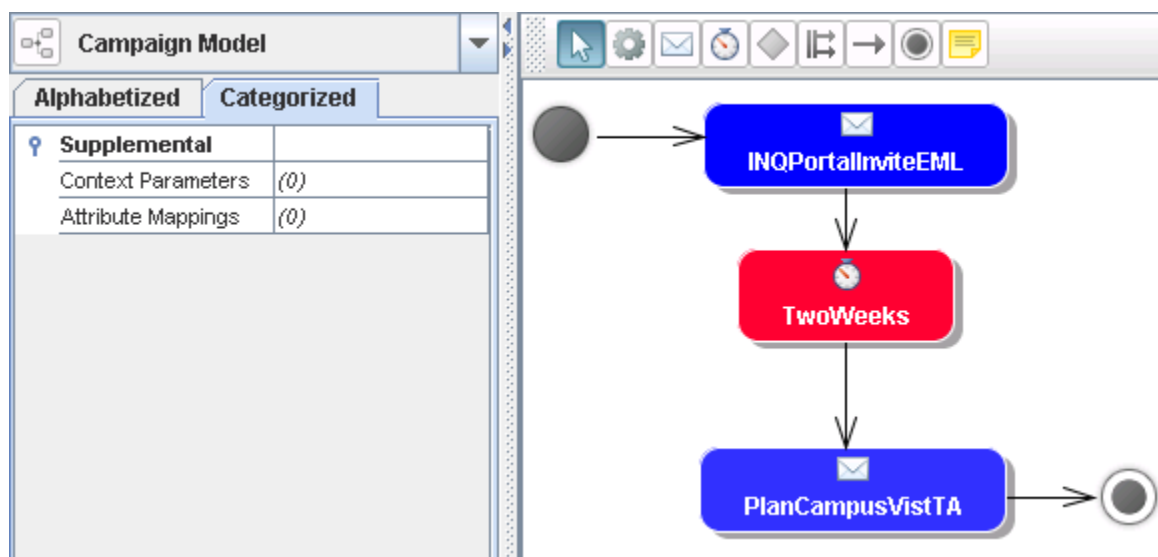
4. The timer transaction has been successfully added to the campaign.




Design the Campaign Flow

The required objects have now been successfully set up. Now indicate where the campaign starts, the direction the campaign progresses, and where it will stop.

1. The **Start** icon  indicates the beginning of the campaign process.
2. Insert a **Stop** icon at the end of the campaign process.
3. Draw **Transitions** between the various objects to create the process flow. To draw a transition, click on the transition button in the menu, then click on the starting point (object) for the transition. Hold the mouse button down while you drag the line to the next object. When the line turns from red to blue, you have connected the two points successfully and you may release the mouse.




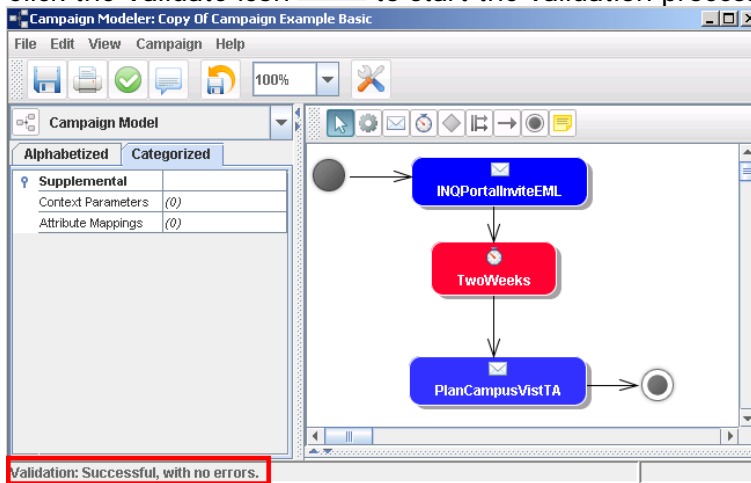
The process flow has been successfully completed for the campaign.


Click the  **Save** icon to save the campaign.

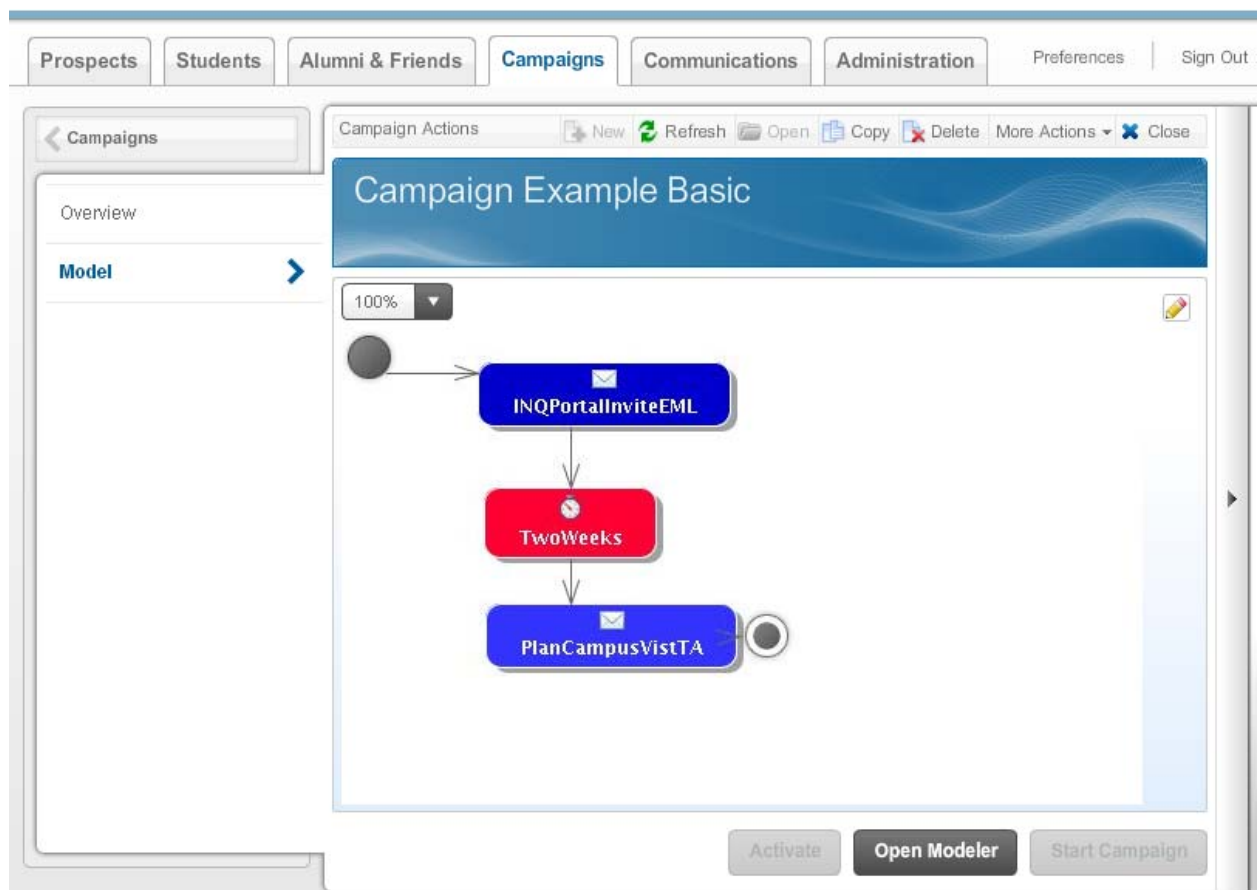
Validate and Save the Campaign

After the campaign has been completed, the campaign should be validated to check the syntax of the model.

Click the Validate icon  to start the validation process.



The validation process was successful. Click the  **Save** icon to save the entire campaign model and then exit out of the modeler. You can exit by going to File then Exit in the drop down menu, or by simply clicking the "X" in the top right hand corner of the modeler window. The new model appears in the Campaigns workspace. Click the **Refresh** icon if the model does not show immediately.



Population List

Introduction

A campaign is developed to target a specific audience. The target audience is defined within the campaign through a population list.


A population list must be associated to a campaign before the campaign can be activated. Population lists can be modified up until the time that the campaign status is changed to **Active**.

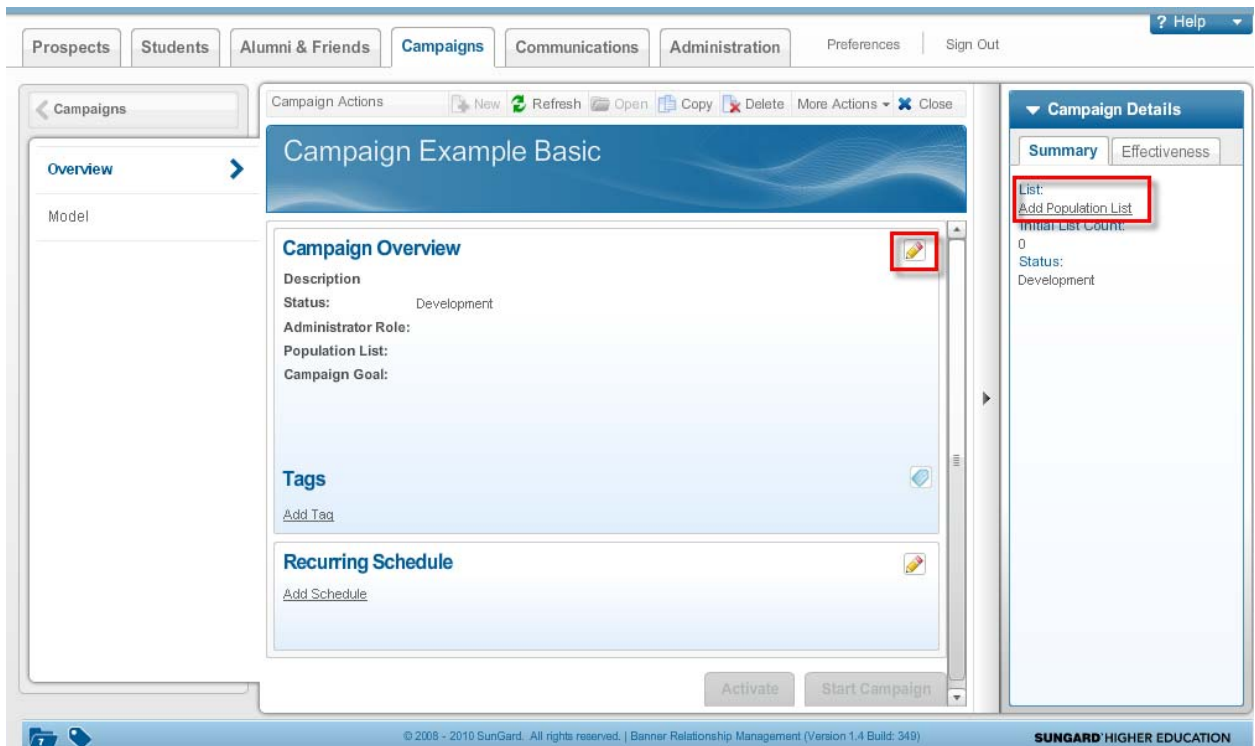
Once a campaign is started, you CANNOT add individuals to the campaign. When the campaign initiates, a campaign instance will start for each person on the target list.

Population lists are created via Expressions in the Administration Workspace and can be viewed and modified via the Profile Workspace. Refer to the Expressions Workbook for more information on Expressions and the Profile Training Workbook for more information on Profile search and Population Lists.

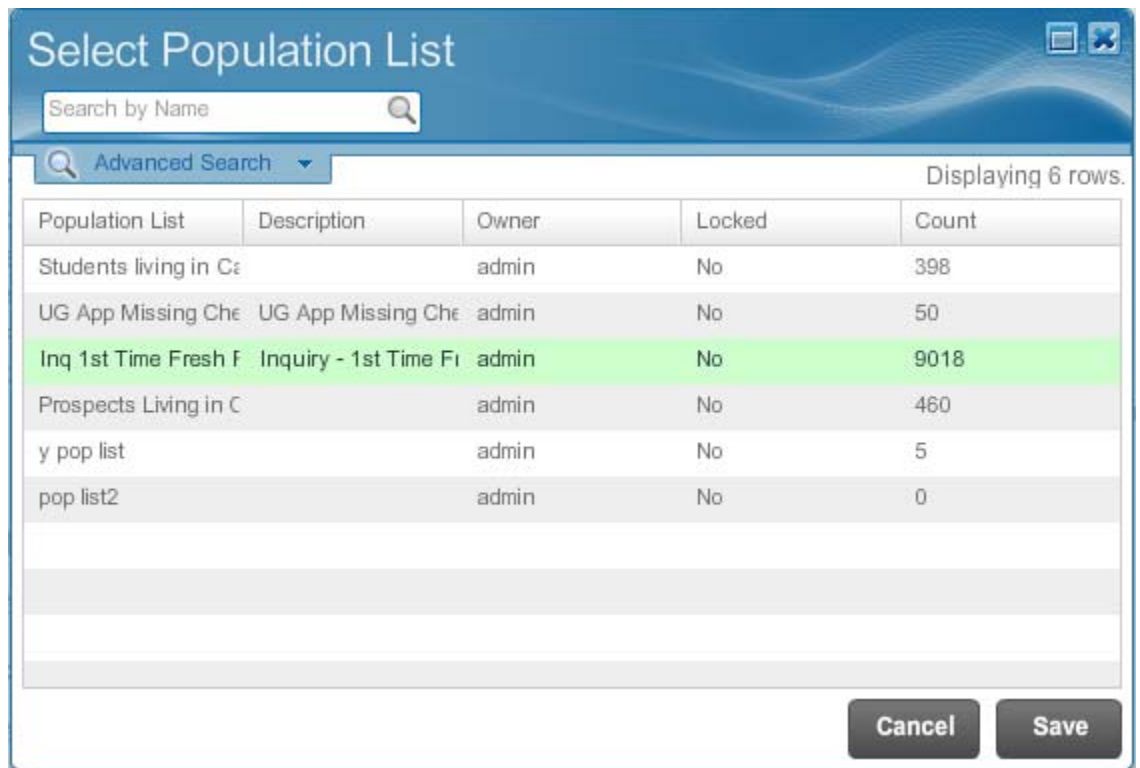
Add or Edit a Population List

A population list can be added or edited in two different places:

- Campaign Overview - Click the  icon to open the Campaign Overview window.
- Campaign Details – Click the link [Add Population List](#).



1. Select the appropriate list from the Population Lookup dialog box.

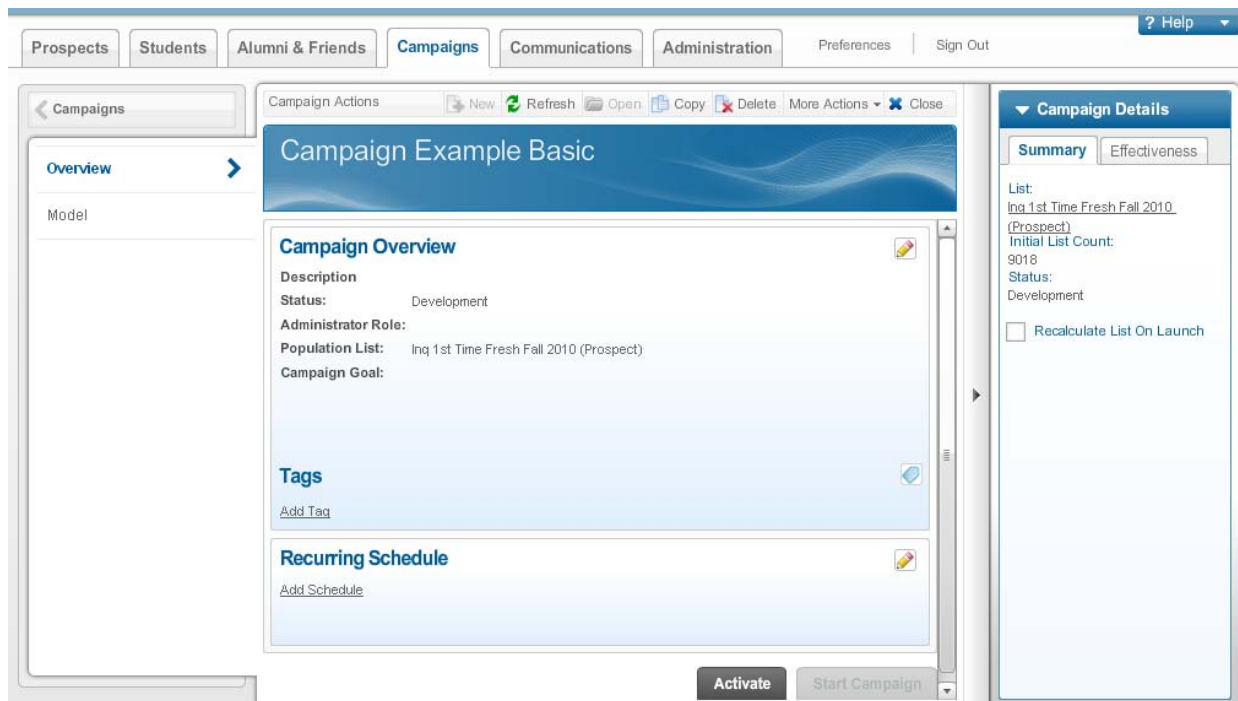


The 'Select Population List' dialog box features a search bar at the top with the placeholder text 'Search by Name'. Below the search bar is an 'Advanced Search' button. The main area contains a table with the following data:

Population List	Description	Owner	Locked	Count
Students living in C		admin	No	398
UG App Missing Che	UG App Missing Che	admin	No	50
Inq 1st Time Fresh F	Inquiry - 1st Time F	admin	No	9018
Prospects Living in C		admin	No	460
y pop list		admin	No	5
pop list2		admin	No	0

At the bottom right of the dialog are 'Cancel' and 'Save' buttons. The text 'Displaying 6 rows.' is located in the top right corner of the table area.

2. Click **Save**. The screen image indicates that the list is being generated. When generated, the selected list name will display.



The screenshot shows the 'Campaign Management' interface. The top navigation bar includes tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns' (selected), 'Communications', 'Administration', 'Preferences', and 'Sign Out'. The main content area is titled 'Campaign Example Basic' and contains a 'Campaign Overview' section with the following details:

- Description
- Status: Development
- Administrator Role:
- Population List: Inq 1st Time Fresh Fall 2010 (Prospect)
- Campaign Goal:

Below the overview are sections for 'Tags' (with an 'Add Tag' link) and 'Recurring Schedule' (with an 'Add Schedule' link). At the bottom right of the main area are 'Activate' and 'Start Campaign' buttons. On the right side, the 'Campaign Details' sidebar shows a 'Summary' tab with the following information:

- List: Inq 1st Time Fresh Fall 2010 (Prospect)
- Initial List Count: 9018
- Status: Development
- ☐ Recalculate List On Launch

Recalculate List

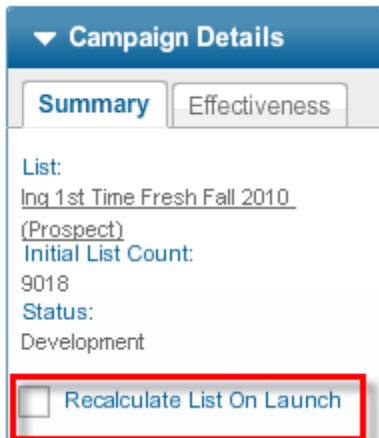
As prospects are added into the system, they can meet pre-established campaign criteria defined in the expression used to create the population list and be added to the list. You can ensure that “new” names are included in your campaign by choosing to recalculate the list prior to launch. Updating a list can be done manually or automatically (by clicking the **Recalculate List on Launch** checkbox on the Campaign Details tab.

To manually recalculate a list (at any time prior to activating the campaign):

- Click the **Recalculate List** button.

To automatically recalculate a list upon launch:

- Click the **Recalculate List on Launch** checkbox (located in the Campaign Details Summary tab) to generate a new list prior to running the campaign.



The screenshot shows the 'Campaign Details' window with the 'Summary' tab selected. The window displays the following information: List: Inq 1st Time Fresh Fall 2010 (Prospect), Initial List Count: 9018, Status: Development. At the bottom, there is a checkbox labeled 'Recalculate List On Launch' which is currently unchecked. A red rectangular box highlights this checkbox.

Activate a Campaign

Introduction

A validated campaign cannot be started and used until it has been activated. Activating a campaign marks that development for the campaign is complete.

After a campaign has been activated, the campaign cannot be modified.

The campaign can be copied and saved under a new name but the population list will not copy, and a new population list will need to be attached.

The screenshot displays the 'Campaign Management' interface. At the top, there is a navigation bar with tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns' (selected), 'Communications', and 'Administration'. To the right of these tabs are links for 'Preferences' and 'Sign Out', and a 'Help' button. Below the navigation bar, the main content area is titled 'Campaign Example Basic'. On the left, there is a sidebar with 'Overview' and 'Model' tabs. The 'Overview' tab is active, showing a 'Campaign Overview' section with the following details: Description, Status: Development, Administrator Role: Recruiter, Population List: Inq 1st Time Fresh Fall 2010 (Prospect), and Campaign Goal. Below this, there are sections for 'Tags' (with an 'Add Tag' link) and 'Recurring Schedule' (with an 'Add Schedule' link). At the bottom of the main content area, there are two buttons: 'Activate' and 'Start Campaign'. On the right side, there is a 'Campaign Details' panel with two tabs: 'Summary' (selected) and 'Effectiveness'. The 'Summary' tab shows the following information: List: Inq 1st Time Fresh Fall 2010 (Prospect), Initial List Count: 9018, Status: Development, and a checkbox for 'Recalculate List On Launch' which is currently unchecked.

To activate the campaign, click **Activate** at the bottom of either the **Overview** screen or **Model**. Once selected, the **Activate** button becomes inactive and the **Start Campaign** button becomes active.

The screenshot displays the SunGard Banner Relationship Management interface. At the top, a navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration, along with a Help icon and a Sign Out link. The left sidebar shows the 'Campaigns' section with 'Overview' and 'Model' tabs. The main content area is titled 'Campaign Example Basic' and contains the following information:

- Campaign Overview**
 - Description:
 - Status: Active
 - Administrator Role: Recruiter
 - Population List: Inq 1st Time Fresh Fall 2010 (Prospect)
 - Campaign Goal:
- Tags**
 - Add Tag
- Recurring Schedule**
 - Add Schedule

At the bottom right of the main content area, there is a 'Start Campaign' button. The right sidebar shows 'Campaign Details' with a 'Summary' tab and a list of prospects:

- List: Inq 1st Time Fresh Fall 2010 (Prospect)
- Initial List Count: 9018
- Status: Active
- ☐ Recalculate List On Launch

The footer of the interface includes the copyright notice '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 349)' and the SunGard Higher Education logo.

Starting a Campaign

Introduction

The final step in a campaign is to start the campaign process.

There are two options available:

Launch Now – Starting a campaign immediately will initiate a campaign instance for each individual on the associated population list.

Schedule Date & Time – Starts the campaign at a specific time in the future.

Once the campaign starts, the **Start Campaign** button will become inactive.

To begin the process, click the  button. The **Start Campaign** window opens.

The image shows a 'Start Campaign' dialog box. It has a title bar with the text 'Start Campaign' and standard window controls. Inside, there are two radio buttons: 'Launch Now' (which is selected) and 'Schedule Date and Time'. Below these, there is a 'Time Zone' dropdown menu currently set to 'America/New_York'. There are also fields for 'Start Date' (showing 'Aug 12, 2010') and 'Time' (showing '12 : 00 : 00 AM'). At the bottom right, there are 'Cancel' and 'OK' buttons.

A campaign that has been launched immediately cannot be scheduled for launch at a future date, or be deleted if there are campaign instances associated with it.

A campaign that has been scheduled for a future date and time can be rescheduled or unscheduled, provided that the currently scheduled date and time has not occurred. If you choose to unschedule it, you can determine whether you want to reschedule it to launch at a future date or launch immediately.

In the current release of Relationship Management, a campaign can only be started once. To capture new prospects and launch them into a similar campaign, you will need to copy and rename the campaign, and associate with a new population list accordingly.

Campaign Details Panel

Information about the campaign will become available on the **Campaign Details** panel on the right side of the screen.

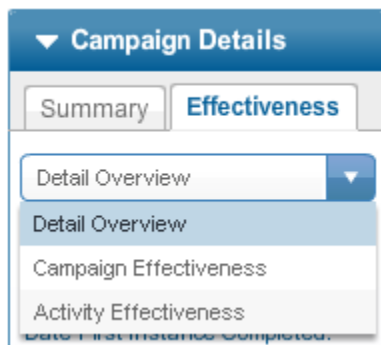
The **Summary tab** will display the population list, the status of the campaign, and the start date.



The screenshot shows a web interface for 'Campaign Details'. At the top is a blue header with a dropdown arrow and the text 'Campaign Details'. Below this is a tabbed interface with two tabs: 'Summary' (which is active and highlighted in blue) and 'Effectiveness'. The 'Summary' tab displays the following information: 'List: Inq 1st Time Fresh Fall 2010 (Prospect)', 'Initial List Count: 9018', 'Status: Active', and 'Start Date: Aug 12, 2010 12:42 PM'. At the bottom of the tab is a checkbox labeled 'Recalculate List On Launch' which is currently unchecked.

Field	Value
List:	Inq 1st Time Fresh Fall 2010 (Prospect)
Initial List Count:	9018
Status:	Active
Start Date:	Aug 12, 2010 12:42 PM
Recalculate List On Launch	<input type="checkbox"/>

The **Effectiveness** tab will display information regarding the aggregate performance of a campaign. There are three views on this tab. Use the drop down arrow to move to a different view.



Detail Overview – Includes date started, date first instance completed, starting target pool, and average duration of a campaign instance.

Campaign Effectiveness – Includes how many instances are running, completed, stopped, and stalled.

Activity Effectiveness – Includes activity-level statistics which tell a user how much of the population touched each activity at least once. Repeats are NOT counted. Extra care needs to be taken in reading the Activity Statistics when your model iterates back to an earlier steps.

Only active, running, campaigns will have an Effectiveness tab in the Campaign Details panel.

Status Search

The Status Search link enables you to see campaign instance progress.

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

- Campaigns
- Status Search**
- Alert Search

Status Actions New Refresh Open Copy Delete More Actions Close

Status Search

🔍

🔍 Advanced Search ▾
Displaying 0 rows.

Target Name	Campaign Name	Status	Start Date	End Date	Alert
-------------	---------------	--------	------------	----------	-------

▼ Campaign Alerts

▼ Status Details

Campaign

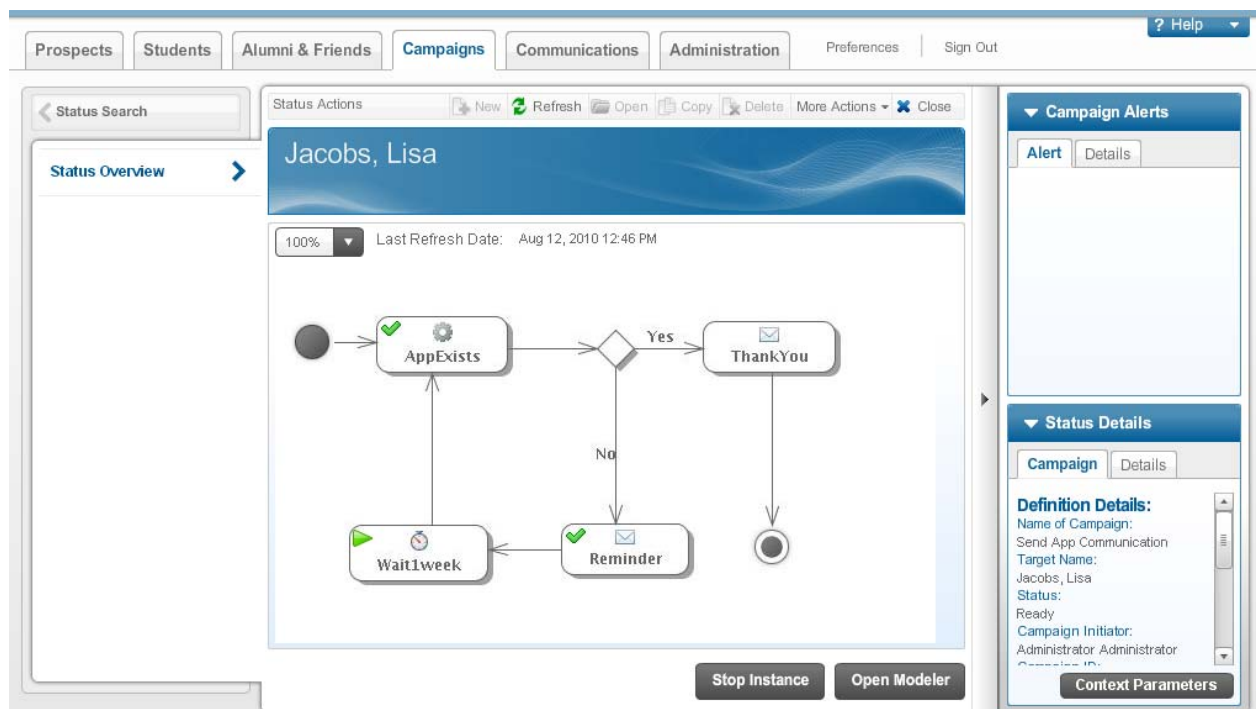
You can search Last Name alone or with one or more additional attributes - Target Last Name, Campaign Name, Administrator Role, Start Date, End Date, and Status. Click Refresh to see a list of all campaign instances. Please note that the list could be extensive!

The screenshot displays the 'Campaigns' section of a software interface. The 'Status Search' tab is active, showing a search bar with the text 'Search by Target Last Name' and a search button. Below the search bar, a 'Search Descriptions' box contains the text 'Target Last Name = J*'. An 'Advanced Search' dropdown is visible. The main area displays a table of campaign instances, with a 'Displaying 106 rows.' indicator. The table has columns for Target Name, Campaign Name, Status, Start Date, End Date, and Alert. The right sidebar contains 'Campaign Alerts' and 'Status Details' sections.

Target Name	Campaign Name	Status	Start Date	End Date	Alert
Jacobs, Lisa	Send App Comm	Ready	Aug 12, 2010 11		
Jankovic, Justin	Send App Comm	Ready	Aug 12, 2010 11		
Jay, Nick	Send App Comm	Ready	Aug 12, 2010 11		
Johnson, Michal	Send App Comm	Ready	Aug 12, 2010 11		
Johnson, Madisc	Send App Comm	Ready	Aug 12, 2010 11		
Justesen, Josh	Campaign Exam	Ready	Aug 12, 2010 12		!
Junk, Trinh	Campaign Exam	Ready	Aug 12, 2010 12		
Joseph, Tory	Campaign Exam	Ready	Aug 12, 2010 12		
Jobst, Lavon	Campaign Exam	Ready	Aug 12, 2010 12		
Jones, David	Campaign Exam	Ready	Aug 12, 2010 12		
Jett, Joan	Campaign Exam	Ready	Aug 12, 2010 12		
Johnson, Rudolp	Campaign Exam	Ready	Aug 12, 2010 12		

All users can view the status of a campaign instance; however, if an alert is present, only the user assigned the Administrator Role can address, or fix, the alert.

Open a target name to view the status overview for that target.



Status Overview

The **Status Overview** shows details about each campaign instance. You can see a graphical representation of the campaign instance, as well as view any alerts/errors associated with it. You can also view more specific detail regarding the campaign instance including:

- progress of the campaign model
- status of campaign activities
- transition details such as sources, rules, and labels

In the **Status Detail** right hand sidebar, information about the campaign and campaign instance details is displayed.

Double-click on an object to view the activity status, activity id, and start and complete dates for that activity in the **Activity Details** tab.

Prospects, Students, Alumni & Friends Workspaces

Once a communication has been sent via the campaign, the person's interaction history is updated in the Prospects, Students or Alumni & Friends workspace in the Interactions section depending on the classification of the person. To view details of an interaction record, you may double click on the record line to open, or click on the interaction record line and then choose open in the menu bar. This will open the interaction record and show details of the individual interaction.

The screenshot displays the SunGard Campaign Management software interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. A search bar is located on the left side of the navigation bar. The main content area is divided into three sections. The left section contains a sidebar with a search bar and a list of categories: Prospect Overview, Biographical (selected), Academic, Personal Outlook, Recruitment, Ratings, Admission, and Interaction. The middle section displays the profile of Lisa Jacobs, with tabs for Bio Data and Contact Information. The Bio Data tab is active, showing details such as Preferred Name, Date of Birth, Marital Status, Legacy, Ethnicity, New Ethnicity, Gender, Age, Religion, Citizenship, and Race. The right section contains two panels: Recruit Track and Profile Summary. The Recruit Track panel lists several records, and the Profile Summary panel shows the Card and Funnel History tabs, with the Card tab selected.

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

Search for Prospects

Prospect Overview

Biographical

Academic

Personal Outlook

Recruitment

Ratings

Admission

Interaction

Lisa Jacobs

Bio Data | **Contact Information**

Details

Preferred Name: Gender: Not Available

Date of Birth: Age: 0

Marital Status: Religion:

Legacy: Citizenship: Other

Ethnicity: Race:

New Ethnicity:

Ethnicity and Race not confirmed

Recruit Track

performacne2-1 UG Accounting

performacne2-2 UG Undeclared

performacne2-3 UG Undeclared

Fall 2010-1 CR Accounting

Profile Summary

Card | **Funnel History**

Lisa Jacobs

Banner Id: T00010006

Holds Exist

Create Interaction | Contact

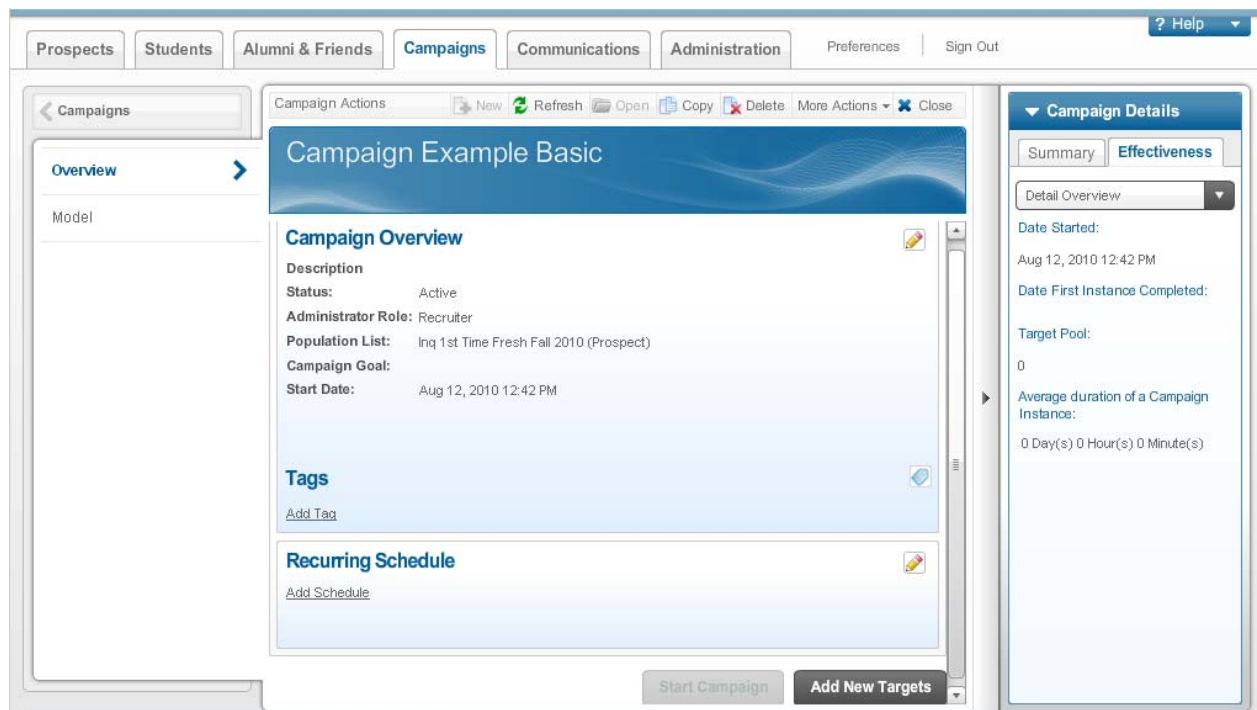
Delete a Campaign

Steps

A campaign may only be deleted if it is not yet active and associated with any instances. In the simplest terms, if you still have a campaign in the development stage and you realize it is not needed, you can delete it. Once it has been 'used' to send communication to a population list, you can no longer delete a campaign.

To delete a campaign:

1. Open the campaign you wish to delete.

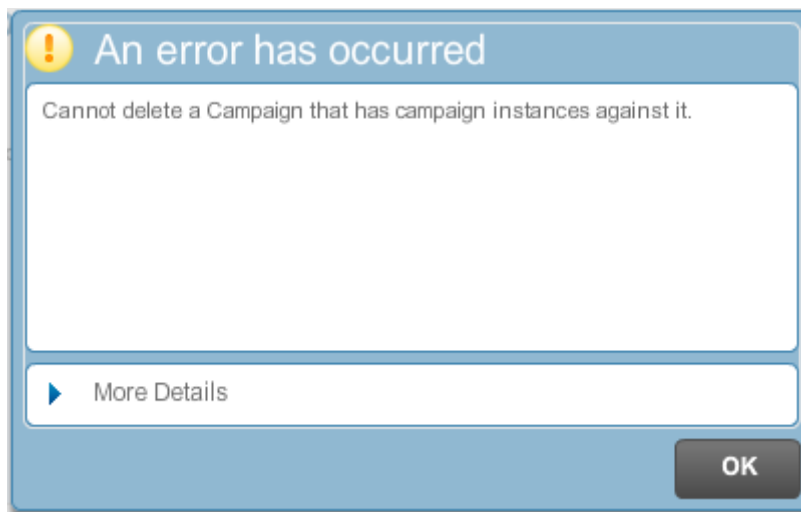


2. Click the delete icon  in the Campaign Actions bar.

3. Click yes when prompted.



4. If the Campaign is active and has any instances associated with it, the campaign cannot be deleted. The following error message will appear:




Duplicating a Campaign

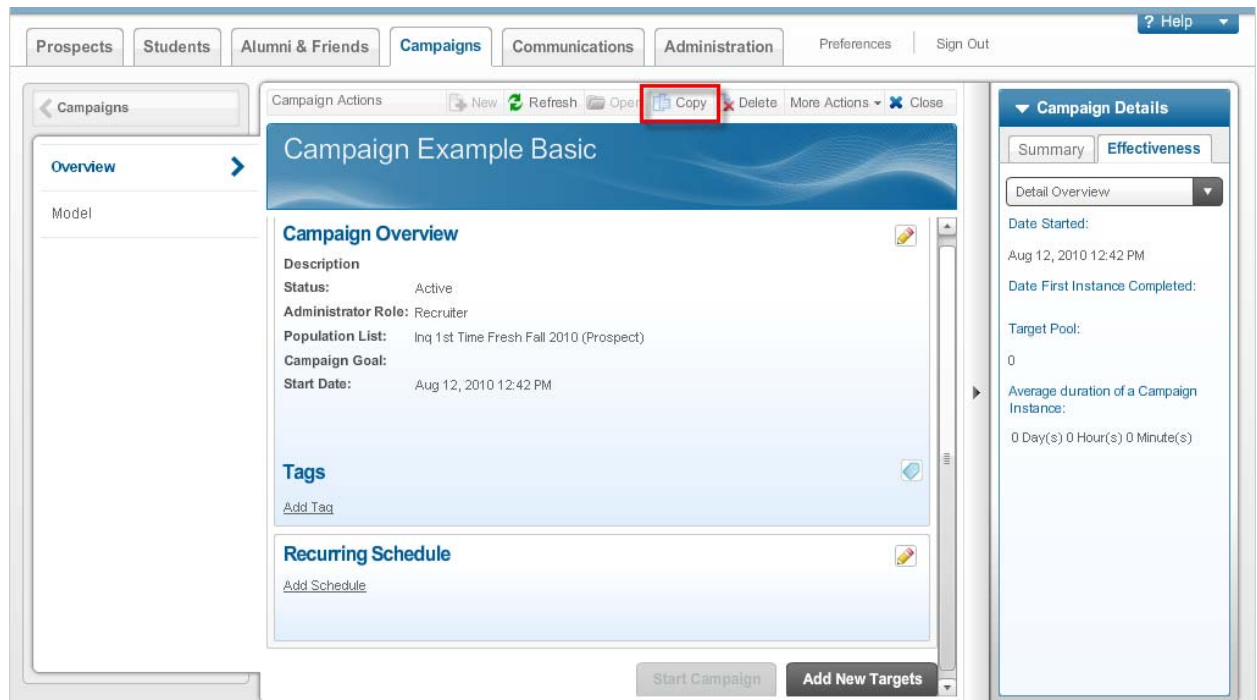
The current release of Relationship Management only allows for a campaign to run a single time associated to one population list, yet there may be campaigns that an institution will want to run on a frequent basis.

This can be accomplished by copying and renaming an established campaign, and scheduling the campaign to run at a future date. The copy feature is similar to the **Save As...** function in word processing.

We will use the example from before, **Campaign Example Basic** to demonstrate how to copy a campaign.

Copy a Campaign

1. Open the campaign called Campaign Example Basic.
2. Click  Copy icon in the Campaign Actions bar.



3. The **Copy** window opens with the default name **Copy of Campaign Example Basic**. This can be edited before saving so it has been edited to **Campaign Example Basic version 1.2**.



4. Click **Save**.

The screenshot shows a web application interface for campaign management. At the top, there is a navigation bar with tabs: Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. To the right of the tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is titled 'Campaign Example Basic Version 1.2'. It contains a 'Campaign Overview' section with fields for Description, Status (Development), Administrator Role (Recruiter), Population List, and Campaign Goal. There are also sections for Tags and Recurring Schedule, each with an 'Add' button. On the right side, there is a 'Campaign Details' sidebar with tabs for Summary and Effectiveness. The Summary tab is active, showing fields for List, Add Population List, Initial List Count, Status, and Development. At the bottom of the main content area, there are buttons for Activate and Start Campaign.

The campaign overview and model have been copied.

A new population list will need to be added to the campaign using the same steps as outlined earlier in the workbook.

The campaign model can also be edited at this point if needed.

Once the population list has been added and any changes completed, validated and saved, the campaign can be activated as described earlier in the workbook.

- Click the **Start Campaign** button. In the popup window select the **Schedule Date and Time** radio button and complete all of the fields.

The screenshot shows a 'Start Campaign' dialog box. It has two radio buttons: 'Launch Now' and 'Schedule Date and Time'. The 'Schedule Date and Time' radio button is selected. Below the radio buttons, there are fields for 'Time Zone' (set to 'America/New_York'), 'Start Date' (set to 'Aug 12, 2010'), and 'Time' (set to '12 : 00 : 00 AM'). At the bottom of the dialog box, there are 'Cancel' and 'OK' buttons.

- Click **OK**.

It is usually recommended to have large campaigns run in the evening or early morning hours to avoid a slow down in software performance during peak working hours.

The Campaign has now been scheduled to begin August 21, 2010. The campaign can be rescheduled or unscheduled as long as there have been no instances run against the campaign.

The screenshot displays the 'Campaigns' section of a software interface. The top navigation bar includes tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns' (selected), 'Communications', and 'Administration'. A 'Help' button is visible in the top right corner. The main content area is titled 'Campaign Example Basic Version 1.2'. It features a 'Campaign Overview' section with the following details: Status: Active, Administrator Role: Recruiter, Population List: Inq 1st Time Fresh Fall 2010 (Prospect), and Campaign Goal: (blank). The 'Scheduled Date' is set for Aug 21, 2010 12:00 AM. Below this are sections for 'Tags' and 'Recurring Schedule', each with an 'Add' button. On the right side, the 'Campaign Details' panel shows the 'Summary' tab with a list of prospects, including 'Inq 1st Time Fresh Fall 2010 (Prospect)', and an 'Initial List Count' of 9018. The status is 'Active'. At the bottom of the main content area, there are 'Reschedule' and 'Unschedule' buttons.

Campaign Overview	
Description	
Status:	Active
Administrator Role:	Recruiter
Population List:	Inq 1st Time Fresh Fall 2010 (Prospect)
Campaign Goal:	
Scheduled Date:	Aug 21, 2010 12:00 AM
Tags	Add Tag
Recurring Schedule	Add Schedule

[Reschedule](#) [Unschedule](#)

Appendix A: Tags



Tags

Description

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

Taggable items

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

- Expressions
- Populations
- Templates
- Campaigns
- Interactions

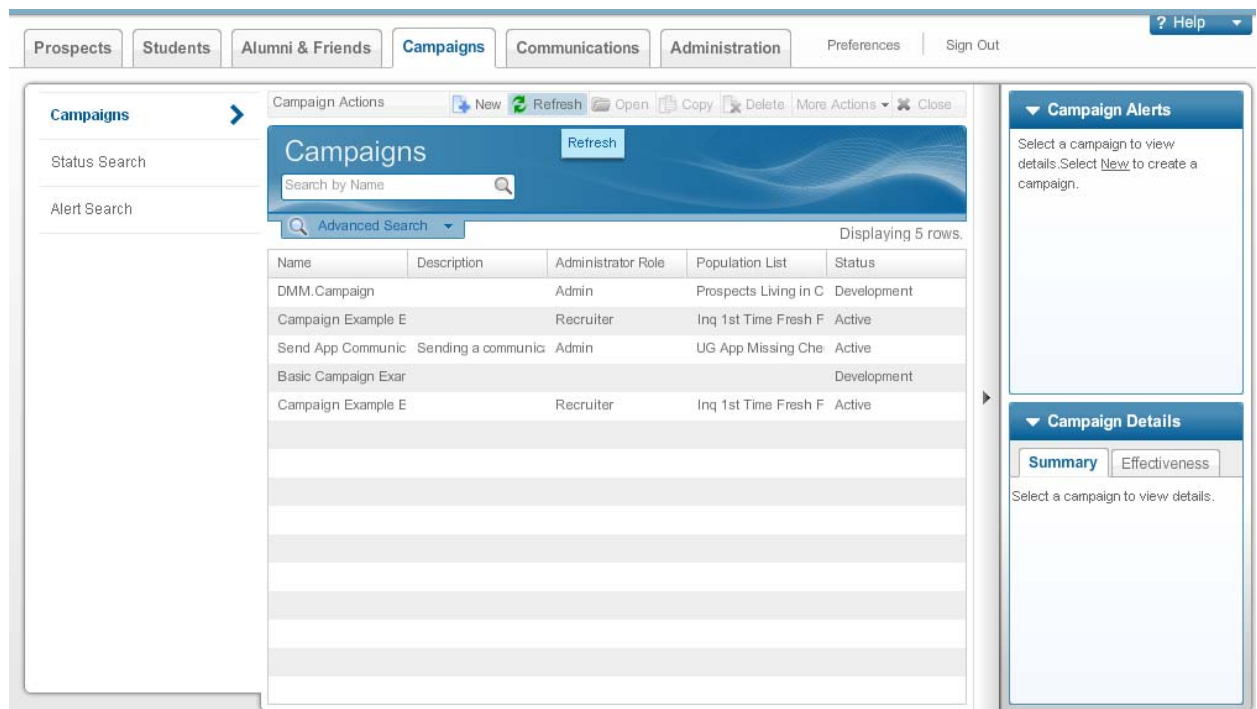
When working with expressions, tags can be incorporated into expression query criteria.

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

Applying a Tag to an Item

Steps

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




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

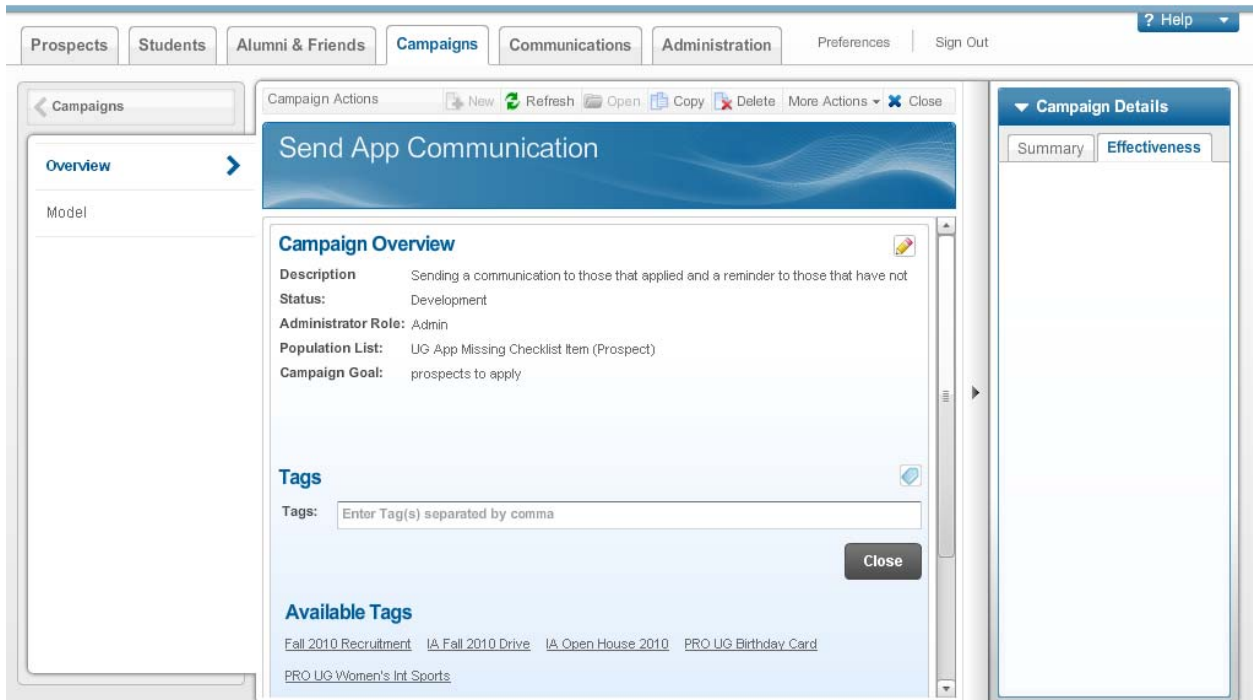
3. The campaign will be displayed.

The screenshot displays the SunGard Campaign Management web application. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. A 'Help' dropdown is visible on the right. Below the navigation bar, the 'Campaigns' section is active, showing a list of campaigns on the left and a detailed view of a selected campaign on the right. The selected campaign is titled 'Send App Communication'. The main content area is divided into three sections: 'Campaign Overview', 'Tags', and 'Recurring Schedule'. The 'Campaign Overview' section contains the following details:

- Description:** Sending a communication to those that applied and a reminder to those that have not
- Status:** Development
- Administrator Role:** Admin
- Population List:** UG App Missing Checklist Item (Prospect)
- Campaign Goal:** prospects to apply

The 'Tags' section has an 'Add Tag' link. The 'Recurring Schedule' section has an 'Add Schedule' link. At the bottom of the campaign details, there are 'Activate' and 'Start Campaign' buttons. On the right side, the 'Campaign Details' panel is visible, showing tabs for 'Summary' and 'Effectiveness'.

4. Click the Tag Display () icon to open the Tag Display interface.



The screenshot shows a web application interface for campaign management. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns (selected), Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar, the main content area is divided into three sections. On the left is a sidebar with a 'Campaigns' header and an 'Overview' tab. The central section is titled 'Send App Communication' and contains a 'Campaign Overview' box with fields for Description, Status, Administrator Role, Population List, and Campaign Goal. Below this is a 'Tags' section with a text input field and a 'Close' button. At the bottom of the central section is an 'Available Tags' list. On the right is a 'Campaign Details' sidebar with tabs for Summary and Effectiveness.

Navigation Bar: Prospects | Students | Alumni & Friends | **Campaigns** | Communications | Administration | Preferences | Sign Out | ? Help

Left Sidebar: Campaigns | Overview | Model

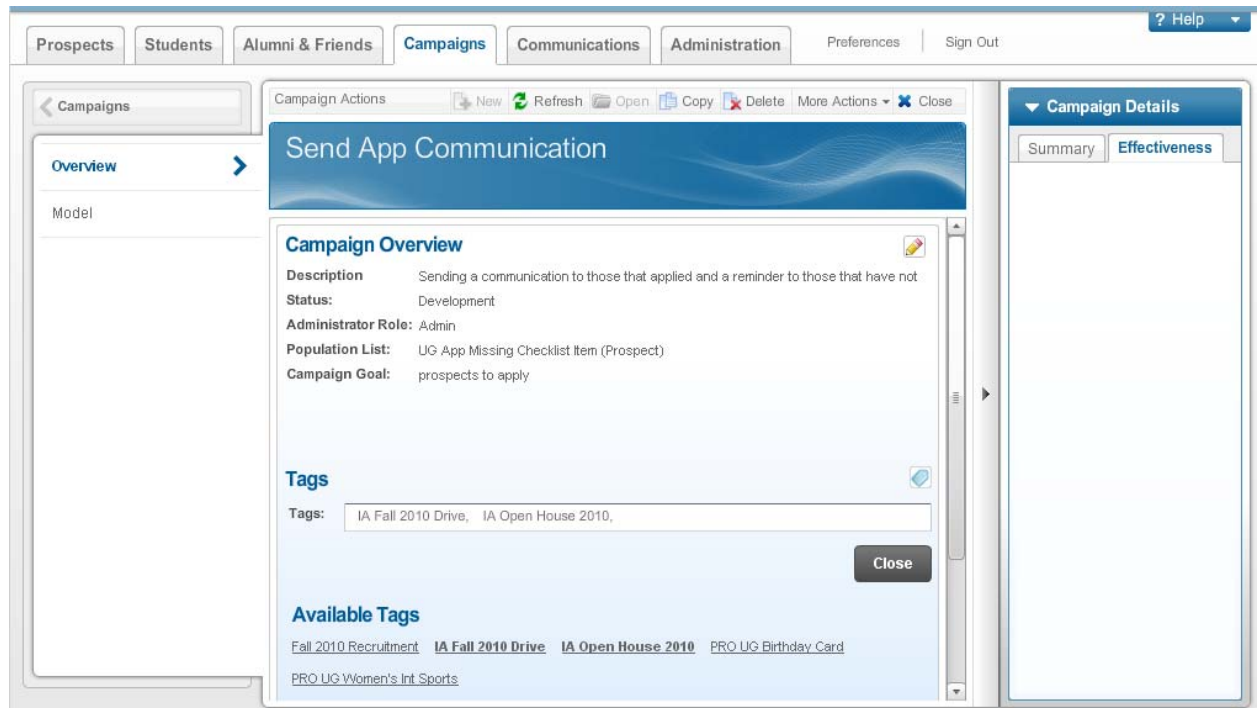
Central Content:

- Campaign Actions:** New, Refresh, Open, Copy, Delete, More Actions, Close
- Send App Communication**
- Campaign Overview:**
 - Description: Sending a communication to those that applied and a reminder to those that have not
 - Status: Development
 - Administrator Role: Admin
 - Population List: UG App Missing Checklist Item (Prospect)
 - Campaign Goal: prospects to apply
- Tags:**
 - Tags: Enter Tag(s) separated by comma
 - Close
- Available Tags:**
 - Fall 2010 Recruitment
 - IA Fall 2010 Drive
 - IA Open House 2010
 - PRO UG Birthday Card
 - PRO UG Women's Int Sports

Right Sidebar: Campaign Details | Summary | Effectiveness

5. Click a tag in the **Available Tags** interface to apply it to the campaign.

Notice that the tag now appears in bold in the interface.



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

View Items With A Specific Tag

Introduction

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

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

Tags Actions New Refresh Open Copy Delete More Actions Close

Tags

Search by Name

Advanced Search

Displaying 0 rows.

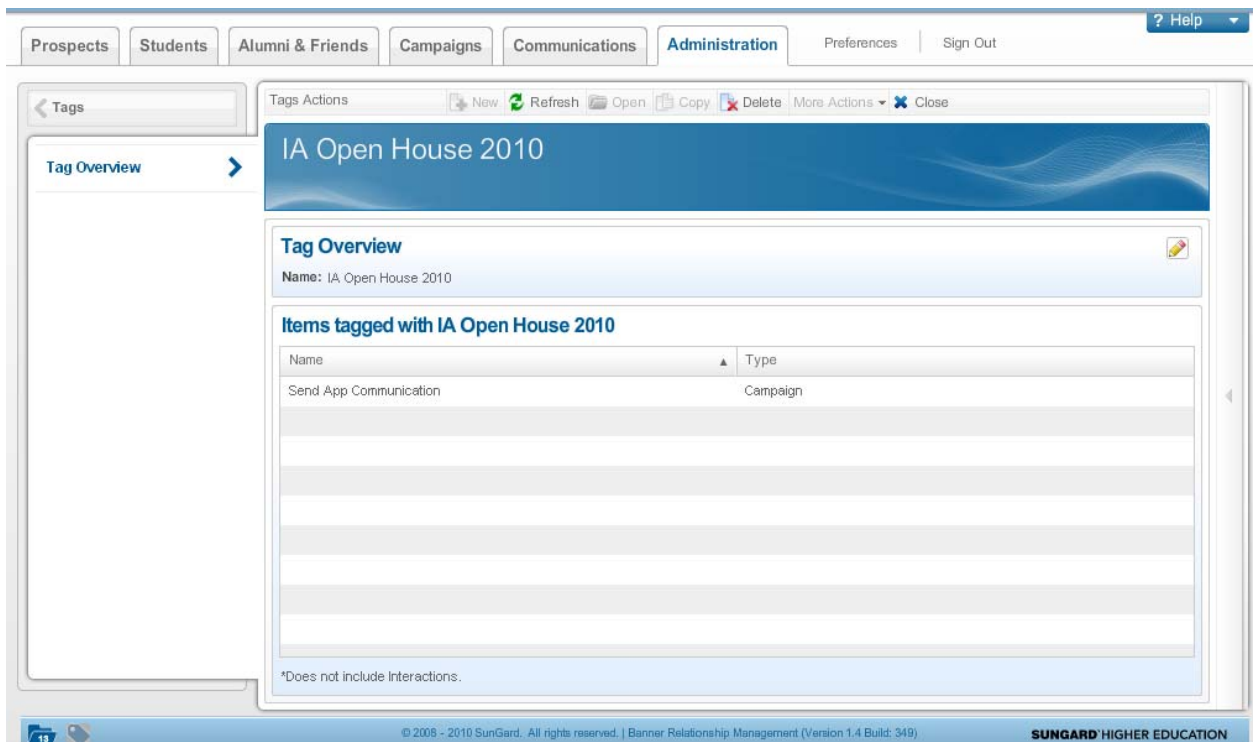
Name	Added By	Added Date	Count of Associ
Fall 2010 Recruitment	admin	Aug 12, 2010 1:00	0
IA Fall 2010 Drive	admin	Aug 12, 2010 1:00	0
IA Open House 2010	admin	Aug 12, 2010 1:00	0
PRO UG Birthday Card	admin	Aug 12, 2010 1:00	0
PRO UG Women's Int Sports	admin	Aug 12, 2010 1:00	0


*Does not include Interactions.

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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 **Campaigns** tab.

The screenshot shows the 'Campaigns' tab selected in the navigation bar. The main content area displays a table of campaigns. The table has columns: Name, Description, Administrator Role, Population List, and Status. The table shows 5 rows of data, with the third row highlighted.

Name	Description	Administrator Role	Population List	Status
DMM.Campaign		Admin	Prospects Living in C	Development
Campaign Example E		Recruiter	Inq 1st Time Fresh F	Active
Send App Communic	Sending a communic	Admin	UG App Missing Che	Active
Basic Campaign Exar				Development
Campaign Example E		Recruiter	Inq 1st Time Fresh F	Active

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

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

The screenshot shows the 'Campaigns' section of a software interface. At the top, there are tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns' (selected), 'Communications', and 'Administration'. Below these are links for 'Status Search' and 'Alert Search'. The main area is titled 'Campaigns' and contains a search bar 'Search by Name'. A dropdown menu 'Select Attribute' is open, showing a list of attributes: 'Description', 'Name', 'Population List', 'Status', and 'Tags'. The 'Tags' attribute is currently selected. Below the dropdown, there are buttons for 'Close', 'Clear', and 'Go'. At the bottom, there is an 'Advanced Search' link and a table header with columns: 'Name', 'Description', 'Administrator Role', 'Population List', and 'Status'. The table is currently empty, with a note 'Displaying 5 rows.'

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

The screenshot shows a 'Select Tags for Search' dialog box. It has two main sections: 'Available Tags' and 'Selected Tags'. The 'Available Tags' section contains a search bar 'Search by Name' and an 'Advanced Search' dropdown. Below this is a table with the following data:

	Name	Added Date	Added By	Tag Count
<input type="checkbox"/>	IA Open Hou...	Aug 12, 2010	admin	1
<input type="checkbox"/>	IA Fall 2010 ...	Aug 12, 2010	admin	1
<input type="checkbox"/>	PRO UG Birt...	Aug 12, 2010	admin	0
<input type="checkbox"/>	PRO UG Wo...	Aug 12, 2010	admin	0
<input type="checkbox"/>	Fall 2010 Rec...	Aug 12, 2010	admin	0

A 'Look Up' icon (⋮) is located between the two panels. The 'Selected Tags' panel is empty and has a 'Clear List' button. At the bottom right, there are 'Cancel' and 'Select' buttons.

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

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

The items that contain your criteria will be displayed.

The screenshot shows the 'Campaigns' section of a software interface. At the top, there are tabs for 'Prospects', 'Students', 'Alumni & Friends', 'Campaigns' (selected), 'Communications', and 'Administration'. Below these are links for 'Preferences' and 'Sign Out'. The 'Campaigns' section has a left sidebar with 'Status Search' and 'Alert Search'. The main area has a 'Campaign Actions' bar with buttons for 'New', 'Refresh', 'Open', 'Copy', 'Delete', 'More Actions', and 'Close'. Below this is a 'Campaigns' header with a 'Search by Name' input field. A search filter is applied: 'Search Descriptions: Tags = IA Fall 2010 Drive'. An 'Advanced Search' button is visible. The results table shows one row: 'Send App Communic' with description 'Sending a communic', administrator role 'Admin', population list 'UG App Missing Che', and status 'Active'. The text 'Displaying 1 row.' is shown to the right of the table.

Name	Description	Administrator Role	Population List	Status
Send App Communic	Sending a communic	Admin	UG App Missing Che	Active

Appendix B: Support Documents



Preparing to Create a Campaign

Step 1 – Describe the campaign to be modeled

What is the name of the campaign?

What are the business goals for this campaign?

Describe the “event” that starts the campaign. Be specific.

Describe the “event” that ends the campaign. Be specific.

Who “owns” this campaign (handles errors while the campaign is running)?

What metrics could be used to identify campaign success?

Step 2: Sketch the model

Step 3 – Identify each activity in the sketched model

Activity Type	Activity Name

Step 4 – Identify activity details

Complete the appropriate activity worksheet for each activity type in your sketch. Activity worksheets are provided at the end of this document for your convenience.

Step 5 – Walk through the final sketch

Be sure to review all the different possible decision point values so that all paths are visited.

MCC Activity Worksheet

MCC Activity Type:

☐ Email

☐ Letter

☐ Targeted Announcement

MCC Activity Name:

MCC Activity Description:

Communication Template Name:

Email activity

Complete the following sender/recipient/subject email information.

From:

To:

cc:

bcc:

Subject:

What text or copy is important to include in the email (remember you will create this template in the Communications workspace)?

What should the campaign model do if the email fails?

- | | | |
|-------|-----------------|---|
| _____ | Complete | Ignore failure and continue to the next activity. |
| _____ | Release | Correct error and continue to next activity. |
| _____ | Stop | Stop the campaign instance. |

Letter or Targeted Announcement

Complete the following sender/recipient/subject email information.

From:

To:

cc:

bcc:

What should the letter body contain? What content should be included in the targeted announcement?

What should the campaign model do if the letter/targeted announcement fails?

- | | | |
|-----|-----------------|---|
| ___ | Complete | Ignore failure and continue to the next activity. |
| ___ | Release | Correct error and continue to next activity. |
| ___ | Stop | Stop the campaign instance. |

Timer Activity Worksheet

Timer Activity Name:

Timer Activity Description:

Wait Time (days, hours, minutes):

OR

Fixed date (date and time):

What should the campaign model do if the timer activity fails?

- | | | |
|--------------------------|-----------------|---|
| <input type="checkbox"/> | Complete | Ignore failure and continue to the next activity. |
| <input type="checkbox"/> | Release | Correct error and continue to next activity. |
| <input type="checkbox"/> | Stop | Stop the campaign instance. |

Appendix C: Naming Conventions



Naming Convention Recommendations

Why Use Naming Conventions

A consistent approach to naming conventions will:

- Aid in searches and sorting of long lists of objects.
- Make it clear as to the purpose and use of the object.
- Supports scalable requirements (such as multiple admissions offices).

General Considerations

- **Consistency:** When possible, use the same conventions for the names and descriptions of all templates, folders, expressions, and campaigns so that each component of an object can be easily matched to the others.
- **Spaces, Dashes, & Dots:** Except for Campaign activities, Banner EM allows the use of spaces in names. This convention is typically more familiar to functional users and is recommended vs. use of dots, hyphens or underscores to separate words in names.
- **Descriptions:** Make use of the Description field – even though it is not a required field – to help understand the use of the item.
- **Name length:** Because drop down / search menus in some places of Relationship Management have limited display areas, shorter names are desirable where possible and practical.

Recommended Abbreviations

Abbreviations are important for some system functions, where long names will be truncated. Using abbreviations helps ensure that all necessary information about the item can be conveyed as efficiently as possible.

Abbreviations are important not only in the Relationship Management Workspace but also for the Recruiting and Admissions Performance solution. Thus meaningful and intuitive abbreviations are important. Avoid complex systems for abbreviations.

Abbreviations should be used consistently through the system. For example, do not use ADM for admitted students in some places but DSN (for Decision) in others.

Institutions may develop their own abbreviation sets. The following is one model that institutions may choose to use, but others may be appropriate.

- Prospect – PRO
- Inquiry – INQ
- Applicant - APP
- Admitted – DSN (for Decision)

Naming component hierarchy

To facilitate quick searching of lists, having a standard sequence for name elements is recommended. The specific sequence may vary depending on the EM component, but should be used consistently within that area.

For example, with communication templates, the following sequence may be appropriate:

- **Target** audience
 - **Purpose** of communication
 - **Level** (such as department, major, level, or high school class year)
 - If needed, **Unit** originating communication (such as athletics, admissions, financial aid, provost's office)
 - Template **delivery method**

For a letter or email that invites prospects who are high school juniors to attend a campus open house, the template name would be as follows:

Prospect Visit Invite HS Junior Email and Letter

As needed, add specifications to distinguish:

- **Level:** Institutions with multiple levels may either
 - Assume that undergraduate is assumed unless specified, and only add a level indicator for items that are for graduate, professional, or non-degree programs;
 - OR
 - Mark all templates with level.
- **Term:** Templates that are appropriate for a specific term should be marked this way as an additional step beyond limiting their active dates.

Folders

The number of folders an institution needs will depend on the number of items they anticipate creating. Several important items to consider when developing folders in the current release of Relationship Management:

- There is no nesting of folders in the current release. Thus you may need to create similarly named folders, with distinctions between purposes indicated deeper in the file name. As an example, you may have multiple folders for international students.
 - You cannot have one “International” folder with subfolders for topics such as housing, financial aid, and visa and legal requirements.
 - Instead, you may have folders titled
 - International Visa & Legal
 - International Financial Aid
 - International Housing
- Templates cannot be moved from one folder to another after they are published. Be sure to create the necessary folders before you begin to generate templates. You can, however, add folders as needed.

- You can change a folder name that contains templates. Thus if the purpose of the folder changes from its original intent, you can change the name of the folder.
- Plan for growth. If a folder has the potential to include hundreds of templates, consider whether template names will be sufficient to facilitate searching or whether you should break this into multiple folders.
- Like items should have folder names that begin similarly. For example, if all graduate communications are distinct from undergraduate communications, it may be beneficial to for all graduate folders to begin with the word "Graduate", so that individuals working on graduate admissions can easily select templates from the appropriate folder.

Below is one example of a folder name structure. Additional or alternative folders may be appropriate depending on the institution.

Names	Descriptions
General/Events	General Information and Events for any population
Prospects	Information for prospects
Inquiry Transfer	Information for transfer inquiries
Inquiry 1 st Time FYS	Information for first time first-year student inquiries
Inquiry Non-Degree	Information for non-degree inquiries
Applicant Transfer	Information for transfer applicants
Applicant 1 st Time FYS	Information for first time first-year student applications
Applicant Non-Degree	Information for non-degree applicants
Decisoned	Information for applicants with a decision code
Personal Recruiter Name	Templates specific to a recruiter.
ZTest and Training	Folder to house templates created for testing or training purposes. [This category should not exist in the production environment, but can be very helpful in the test environment to avoid clutter in the other categories. Using Z in the front helps place this at the bottom of the list.]

Communication Templates

Naming conventions for communication templates will help users locate the appropriate template for communications and assist users of Recruiting and Admissions Performance, where these names will be evident as well.

The following is an example of communication templates that might be placed in the Inquiry 1st Time First-Year Student folder:

Names	Descriptions
INQ Ful Gen LTR	Inquiry Fulfillment Letter to everyone (non-departmental)
INQ Flwup Gen EML	Inquiry Follow up Email to everyone (non-departmental)
INQ CurrSt Gen TA	Inquiry Targeted Announcement from Current Student to everyone (non-departmental)

Expressions

The names for expressions should reflect the output of the expression.

Name sequencing is complicated, since the Expression Builder includes well over 100 options, many of which include multiple individual values. However, using the primary search terms in the expression is important, as is consistency in the naming sequence for parallel expressions. For example:

- If the expression retrieves all inquiries of a particular admission type for a particular college and term, the expression name might be "INQ FYS Engineering Fall 2008."
- Parallel or similar expressions should use parallel names. Thus the equivalent expression to the one above for the College of Nursing would be "INQ FYS Nursing Fall 2008."

If the expression allows the user to specify values upon calculation, the name should indicate this. One efficient way is via use of question marks. For example, if the expression allows a recruiter to input the college and state of their choice, the expression name might be "College ? and State ?".

Population Lists

Population list names should reflect the logical attributes underlying the list.

Lists created via expressions should use the expression name in the list.

- For lists that are snapshots (i.e., cannot be refreshed), the population list should indicate the date on which the list was created (for example, "PA Engineering Fall 2009 05082008.")
- For lists that may be refreshed, indicate this in the name as a reminder to capture the appropriate population before using the list (for example, "PA Engineering Fall 2009 Refresh.")

Campaigns

Campaign names should reflect the intent of the campaign. For example, a campaign focused on completion of incomplete applications for Fall 2009 might be named App Complete Fall 2009.

Campaign names, like templates, should follow a consistent sequence in naming elements.

Since campaigns in the current release of Relationship Management cannot be run continuously with new populations, you may need to run a campaign multiple times to capture new targets who enter your funnel after the initial launch of the campaign. Place the intent of the campaign first in the name, and the iteration at the end. For example, if you have a campaign designed to encourage prospects for fall 2009 to complete their applications that you run several times, you may use the following sequence:

- App Complete Fall 2009 #1 (launched November 1, 2008)
- App Complete Fall 2009 #2 (launched December 1, 2008)
- App Complete Fall 2009 #3 (launched January 1, 2009)

Campaign Activities

- **Relevance:** Names for campaign activities should reflect the activity itself, with the greatest level of specificity possible.
- **Spaces:** Campaign activity names cannot have spaces. Use of capitals to distinguish words can be useful (for example, CompletionReminder or VisitInvite).
- **Uniqueness:** Each activity in a campaign model must have a distinct name.
- **Communication activities** should use the name of the communication template. If the same template is used multiple times, append a #1, #2, etc. to the activity name, since you cannot use the same activity name twice in a campaign model.
- **Timers:** If multiple timers in a campaign have the same wait time (e.g., wait 2 weeks), append a #1 or #2, or A and B, to the activity name.
- **Business Rules:** If you use the same rule more than once in a model, again append a #1, #2, etc. to each name to distinguish it.