

# Banner Enrollment Management Suite Relationship Management Alumni & Friends Workspace Training Workbook

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**Revision History Log**

<b>Publication Date</b>	<b>Summary</b>
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<b>08/13/2010</b>	New version that supports the <b>Alumni &amp; Friends</b> tab of the Banner Enrollment Management 1.4 software.
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# Alumni & Friends Workspace



## Workbook goal

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

## Intended audience

Development Office and Alumni Office staff.

## Course objectives

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

# Profile Manager

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## Introduction

Banner Relationship Management is the component of the Banner Enrollment Management Suite that helps you manage your relationship with prospective students, enrolled students and alumni. Whether your focus is on recruiting and admissions, student retention, or alumni engagement, the tools of Banner Relationship Management help you to target, engage, and build relationships with your constituents across the student life cycle.

The profile manager is the central location for working with prospects, students and alumni. It provides admissions office, student services, and alumni office staff with access to personal and relevant academic information about your constituents.

Each profile manager workspace is segmented based on the type of profile and is represented as a separate tab. For example:

- On the **Prospects** tab, a recruiter can create lists of prospective students for use in communications and campaigns. You can view and edit information about your constituents, such as their interests, contact information, and recruitment status.
- On the **Students** tab, an advisor can create lists of students for use in communications and campaigns designed to improve student retention.
- On the **Alumni & Friends** tab, a development officer can create lists of alumni for use in communications and campaigns to increase alumni loyalty and support.

Note: You may see one or more of these profile manager workspace tabs (Prospect, Students, or Alumni/Friends) based on your role and the features your institution is using. This training workbook will use the **Alumni & Friends** workspace and work with Advancement Individual and Advancement Organization profiles.

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

**Search for Alumni & Friends**

Profile Actions New Refresh Open Copy Delete More Actions Close

Population Lists

Interactions

Last Name First Name Banner ID Email Address More Attributes

Clear Go

Displaying 0 rows.

Last Name	First Name	Gender	Birth Date	Donor Category	Class Year	College
-----------	------------	--------	------------	----------------	------------	---------

**Search Tips**

You can search using one or more of the quick search attributes displayed in the search pane or you can select additional search attributes to further refine your search.

Your search will return the best results when you are more specific with your search criteria using multiple search attributes.

**Profile Summary**

## Using the Alumni & Friends Workspace

The Alumni & Friends Workspace is the central location for working with alumni records. It provides alumni office staff with access to personal and contact information about your constituents. As a development officer, you can create lists of alumni for use in communications and campaigns to increase alumni loyalty and support.

Alumni/Development staff can obtain the most current information about their alumni & friends. They can view the latest contacts from constituents and respond immediately to those individuals who are in their particular region or geographic area.

Alumni/Development staff can create customized lists of alumni on-the-spot to enhance their campaign efforts. They can search the entire Banner database for advancement individuals and organizations and get the latest information. Telephone numbers and e-mail addresses are a click away.

Prior to spending time on the road, Alumni/Development personnel can use the Alumni & Friends workspace to discover information about the people and organizations 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 donors an e-mail or make a phone call indicating that they will be nearby on a particular date and time.

Alumni/Development personnel can use the Alumni & Friends workspace to personalize their interactions with donors and to enter or update profile information, add contact comments and update other interaction information. At any time, population lists can be created to help organize interactions and contact information.

Alumni/Development personnel can also prepare follow-up correspondence for donors they have met during the week, and enter specific interests, attributes, legacy information, and contact information for each.

With Relationship Management, an up-to-date profile for each constituent is easy to locate and read. With accessible and updatable contact information, development officers can cultivate donors by making notes and follow-up assignments from recent road visits. If donors are not available via phone, development officers may send an e-mail which automatically updates the history of interactions with these individuals.

Whether on the road or in the office, Profile Manager provides easily accessible and up to date profile information about advancement individuals and organizations. 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 Profile Manager is to begin with an Advancement Individual's or Advancement Organization's profile and then explore the data that is displayed in all the windows for this individual or organization.

When you first open the **Alumni & Friends** tab in Banner Relationship Management, the **Search for Alumni & Friends** view displays. You can search by one or more of the displayed search options. The **Last Name** field is not a required field so if you only had an e-mail address, you could search by e-mail address only. Once you press the Enter key on the keyboard or click the **Go** button at the bottom of the Search for Alumni & Friends option, the names of all persons who match the search criteria will display.

Note: For more information regarding the search and advanced search functions in Relationship Management, please refer to the *Overview* training workbook.

## Steps

1. Click the **Alumni & Friends** tab.

The screenshot shows the Banner Relationship Management interface. At the top, there is a navigation bar with tabs: Prospects, Students, Alumni & Friends (selected), Campaigns, 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 titled 'Search for Alumni & Friends'. On the left side of this area, there is a sidebar with 'Population Lists' and 'Interactions'. The main search area contains a 'Profile Actions' bar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. Below this is a search form with fields for Last Name, First Name, Banner ID, and Email Address, each with a clear button. There is also a 'More Attributes' dropdown menu. At the bottom of the search form are 'Clear' and 'Go' buttons. Below the search form, it says 'Displaying 0 rows.' and there is a table header with columns: Last Name, First Name, Gender, Birth Date, Donor Category, Class Year, and College. Below the table header is a 'Search Tips' section with text explaining search functionality. On the right side of the main content area, there is a 'Profile Summary' sidebar.



2. In any of the available search fields (Last Name, First Name, Banner ID, Email Address), enter the appropriate information then press Enter on your keyboard or click the **Go** button.

Note: To enter values in more than one search field, tab between the fields. You can use the **Select Attributes** drop-down arrow to select additional search fields. Attribute values include: Gender and Government ID.

3. When a list of names appears, you have fast access to the individual's Banner ID as well as contact information such as telephone number, mailing address and email address in the Profile Summary panel on the right side of the window.

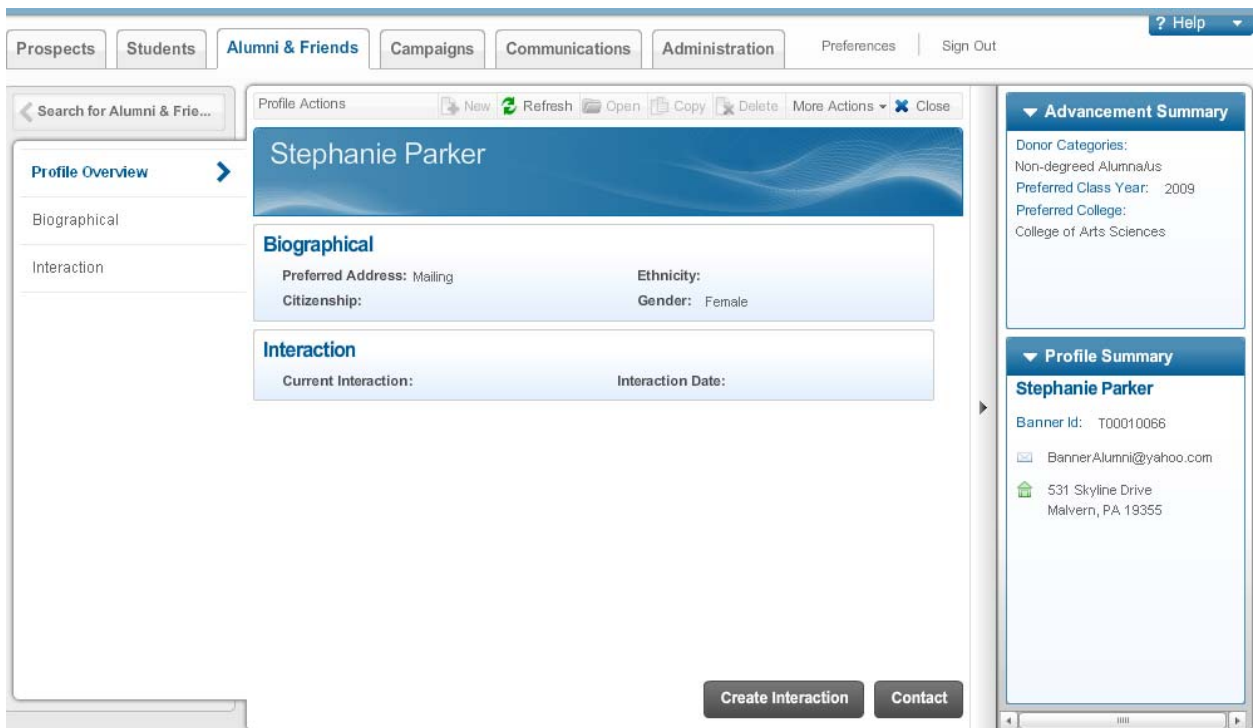
The screenshot displays the Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. A search bar is visible with the text 'Search for Alumni & Friends'. Below the search bar, a table displays search results for 'Parker'.

Last Name	First Name	Gender	Birth Date	Donor Categor	Class Year	College
Parker	Isaac	Male	Jan 01, 1987	Friend	2008	No college desi
Parker	Penny	Female	Jan 01, 1950	Alumna/us	1972	College of Arts
Parker	Stephanie	Female	Jan 01, 1987	Non-degreed A	2009	College of Arts

Displaying 3 rows.

On the right side, the Profile Summary panel for Stephanie Parker is visible, showing her Banner ID (T00010066), email address (BannerAlumni@yahoo.com), and address (531 Skyline Drive, Malvern, PA 19355).

4. 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 Profile Overview. The navigation panes to the left contain the same headings as in the Profile Overview.
  - In the side panel to the right, view the Advancement Summary and the Profile Summary for this particular Advancement Individual or Advancement Organization.
    - The Advancement Summary panel contains information about the constituent and may include donor category, preferred class year, and preferred college.
    - The Profile Summary panel contains information about the individual such as Banner ID and contact information. Confidentiality and deceased indicators are displayed as applicable.



## Navigation Pane

More information regarding a profile is found by clicking on each option in the Navigation Pane. The options under Profile Overview include: Biographical and Interaction.

# Alumni & Friends Overview

## Profile Overview

The most current information for that individual will be displayed in a single, scrollable window called the **Profile Overview**. The Profile Overview is read-only. To add or edit information, click on a topic in the navigation pane to go to the appropriate update window.

The screenshot displays the Banner Relationship Management - Alumni & Friends interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. To the right of these tabs are links for Preferences and Sign Out, and a Help icon. Below the navigation bar is a search bar labeled 'Search for Alumni & Frie...'. The main content area is titled 'Profile Overview' and features a search bar, a 'Profile Actions' menu with options like New, Refresh, Open, Copy, Delete, and More Actions, and a close button. The profile is for Stephanie Parker. The 'Biographical' section includes fields for Preferred Address: Mailing, Citizenship, Ethnicity, and Gender: Female. The 'Interaction' section includes fields for Current Interaction and Interaction Date. On the right side, there are two expandable panels: 'Advancement Summary' and 'Profile Summary'. The 'Advancement Summary' panel shows Donor Categories: Non-degreed Alumnus, Preferred Class Year: 2009, and Preferred College: College of Arts Sciences. The 'Profile Summary' panel shows Stephanie Parker's Banner Id: T00010066, email: BannerAlumni@yahoo.com, and address: 531 Skyline Drive, Malvern, PA 19355. At the bottom right, there are buttons for 'Create Interaction' and 'Contact'.

Information in the Profile 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 Preferred Address, Ethnicity, Citizenship, and Gender.
- **Interaction** - View Interaction History, Interaction Types and Dates. From this page, you may record an interaction (to make note of an interaction with this person) or a create a contact (to communicate to this person)

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

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

# Biographical Information

The Biographical topic in the navigation pane includes **Bio Data** and **Contact Information** for an individual.

## Bio Data Tab

Biographical data includes Preferred Name, Gender, Date of Birth, Age, Marital Status, Religion, Legacy, Citizenship, and Ethnicity, Race, New Ethnicity, and Ethnicity and Race not confirmed and are displayed on the **Bio Data** tab. You may enter or change information on this tab.

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 Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. A search bar is located on the left. The main content area shows the profile of Stephanie Parker, with the Bio Data tab selected. The details section lists the following information:

Details	
Preferred Name:	Gender: Female
Date of Birth: Jan 01, 1987	Age: 23
Marital Status: Married	Religion:
Legacy:	Citizenship:
Ethnicity:	Race:
New Ethnicity:	
Ethnicity and Race not confirmed	

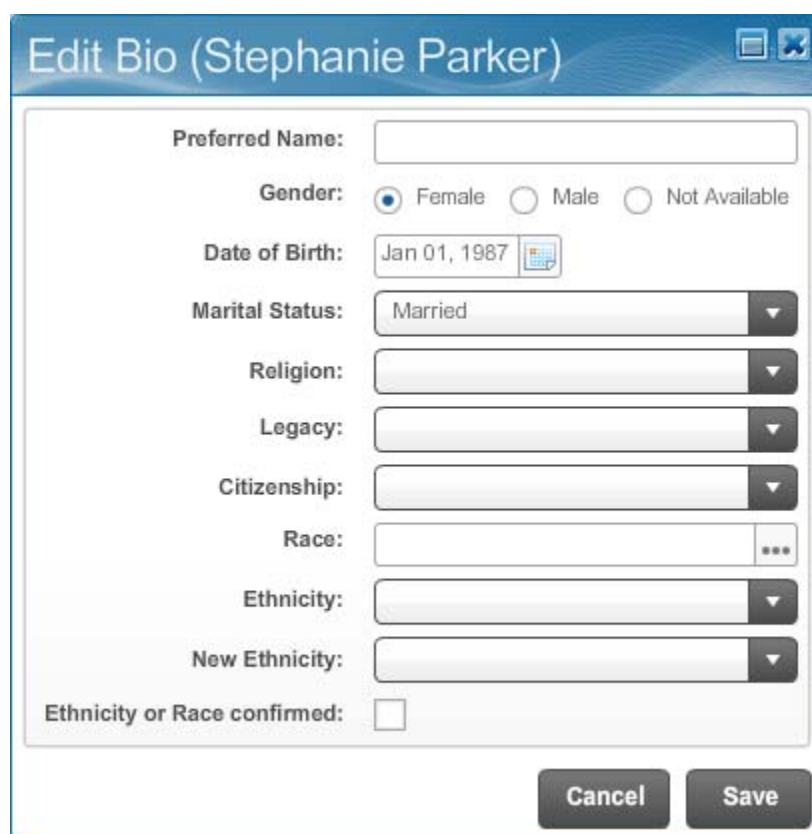
On the right side, there are two summary sections: Advancement Summary and Profile Summary. The Advancement Summary shows Donor Categories: Non-degreed Alumna/us, Preferred Class Year: 2009, and Preferred College: College of Arts Sciences. The Profile Summary shows Stephanie Parker's Banner ID: T00010066, email: Banner.Alumni@yahoo.com, and address: 531 Skyline Drive, Malvern, PA 19355. At the bottom right, there are buttons for Create Interaction and Contact.

## Edit biographical information

Steps to follow to view and edit biographical information for an alumni/friend:



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. For example, type the Advancement Individual's preferred name in the **Preferred Name** field. Select the appropriate radio button for **Gender**. Use the calendar to enter **Date of Birth**.




The screenshot shows a web application window titled "Edit Bio (Stephanie Parker)". The window contains the following fields and controls:

- Preferred Name:** A text input field.
- Gender:** Three radio buttons labeled "Female" (selected), "Male", and "Not Available".
- Date of Birth:** A text field showing "Jan 01, 1987" with a calendar icon to its right.
- Marital Status:** A dropdown menu with "Married" selected.
- Religion:** A dropdown menu.
- Legacy:** A dropdown menu.
- Citizenship:** A dropdown menu.
- Race:** A text input field with a "..." button to its right.
- Ethnicity:** A dropdown menu.
- New Ethnicity:** A dropdown menu.
- Ethnicity or Race confirmed:** A checkbox.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

3. 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
4. Click the **Look Up**  icon in the **Race** field.
5. 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.


**Add and Remove Races**

**Available Race(s)**


Filter 

<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	21	Malaysian
<input type="checkbox"/>	2AE	Asian Laos
<input type="checkbox"/>	5C	European
<input type="checkbox"/>	3D	Haitian
<input type="checkbox"/>	B	Pacific Islander
<input type="checkbox"/>	18	Chippewa Red Cliff
<input type="checkbox"/>	CAU	Caucasian
<input type="checkbox"/>	15	Blood
<input type="checkbox"/>	11	American Indian or Alaskan Nat
<input type="checkbox"/>	CMS	Eskimo
<input type="checkbox"/>	SP	Scandinavian



**Selected Race(s)**

Clear List 

Code	Description



**Cancel** **Select**

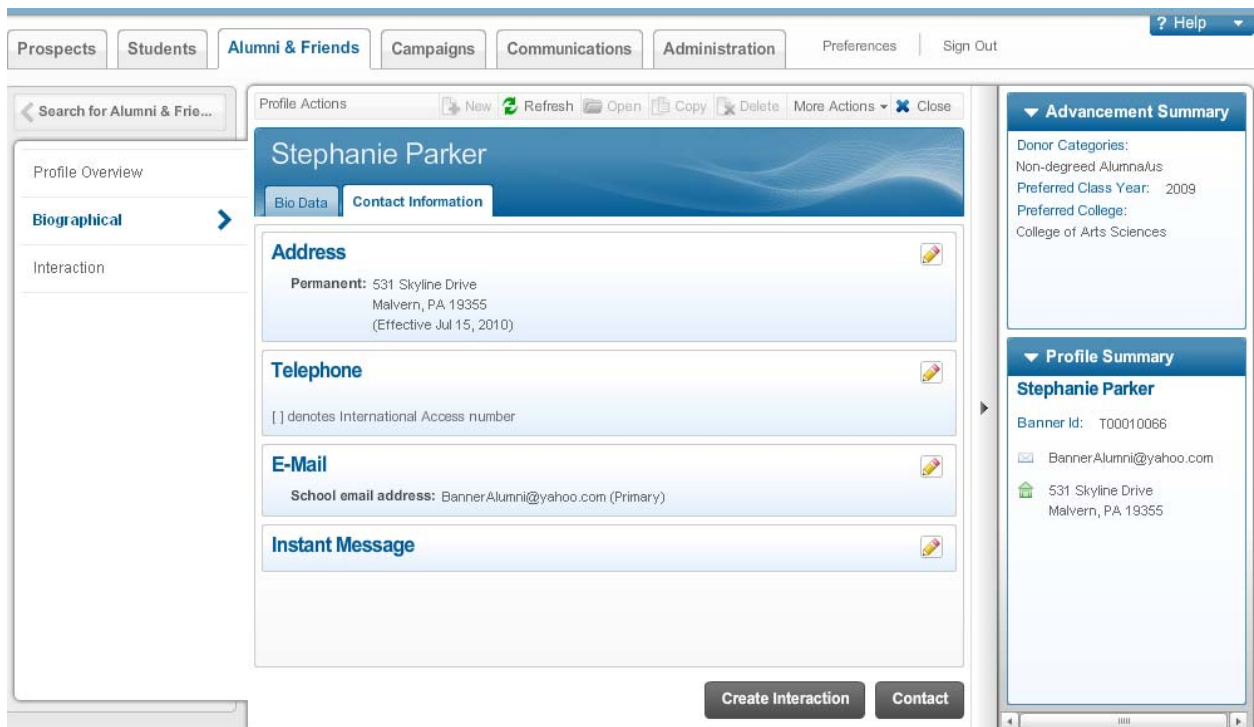
6. If desired, select an existing race and click the delete icon () to remove it.
7. Click  to add the selected race(s) to the profile.
8. Click the **Ethnicity or Race confirmed** checkbox as appropriate.
9. Click the **Save** button.

## 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 Profile 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 Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. A search bar is located on the left. The main content area shows the profile for Stephanie Parker, with the Contact Information tab selected. The profile details include:

- Address:** Permanent: 531 Skyline Drive, Malvern, PA 19355 (Effective Jul 15, 2010)
- Telephone:** [ ] denotes International Access number
- E-Mail:** School email address: BannerAlumni@yahoo.com (Primary)
- Instant Message:**

On the right side, there are two summary sections:

- Advancement Summary:** Donor Categories: Non-degreed Alumna/us, Preferred Class Year: 2009, Preferred College: College of Arts Sciences.
- Profile Summary:** Stephanie Parker, Banner Id: T00010066, BannerAlumni@yahoo.com, 531 Skyline Drive, Malvern, PA 19355.

At the bottom right, there are buttons for "Create Interaction" and "Contact".



## Add or edit address information

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

The screenshot shows the 'Contact Information' tab selected. It contains four sections: 'Address', 'Telephone', 'E-Mail', and 'Instant Message'. Each section has an edit icon (pencil) in the top right corner.

**Address**

Permanent: 531 Skyline Drive  
Malvern, PA 19355  
(Effective Jul 15, 2010)


**Telephone**

[ ] denotes International Access number

**E-Mail**

School email address: BannerAlumni@yahoo.com (Primary)







**Instant Message**

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

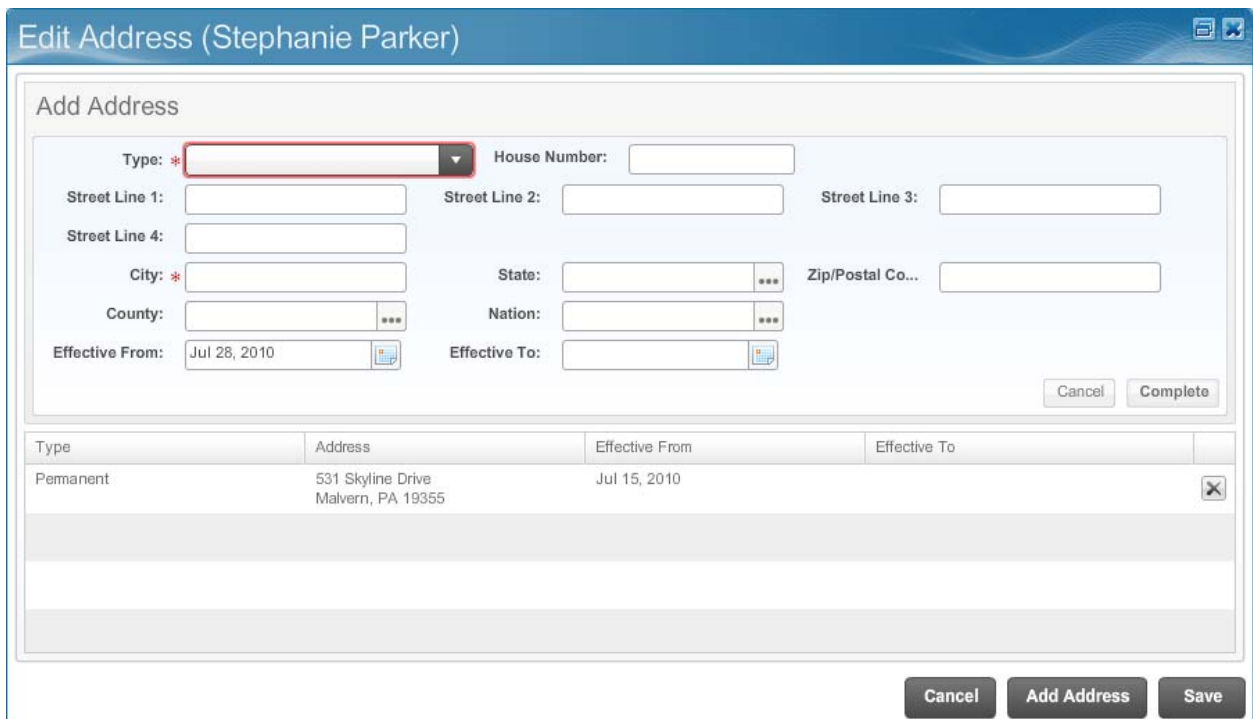
The 'Edit Address (Stephanie Parker)' window displays a table with columns: Type, Address, Effective From, and Effective To. The first row shows 'Permanent' address information. A red circle 'B' highlights the 'Type' column header, and a red circle 'C' highlights the 'Effective To' column header. At the bottom, there are three buttons: 'Cancel' (labeled 'D'), 'Add Address' (labeled 'A'), and 'Save' (labeled 'E').

Type	Address	Effective From	Effective To
Permanent	531 Skyline Drive Malvern, PA 19355	Jul 15, 2010	

Cancel Add Address Save

3.  To add an address, click the **Add Address** button.
4.  To edit an address, move the mouse over the address to highlight, and then click on the address. This opens the editing window.
5.  To delete an address, click the **Delete** icon. .
6.  If you delete in error, click the **Cancel** button.
7.  Use the **Save** button to save any changes.

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



**Edit Address (Stephanie Parker)**

**Add Address**

Type: \*  House Number:


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

Street Line 4:

City: \*  State:  Zip/Postal Co...

County:  Nation:

Effective From: Jul 28, 2010 Effective To:

Type	Address	Effective From	Effective To
Permanent	531 Skyline Drive Malvern, PA 19355	Jul 15, 2010	

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

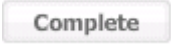
Use the editing buttons to cancel or complete your work while working in the edit window.



## Add a new address

1. Click the **Add Address** button.
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. Review the information in the view window.
5. Click the **Save** button.

## Edit an existing 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.

Edit Address (Stephanie Parker)

Update Selected Address


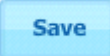

Type: \* Permanent House Number: Street Line 1: 531 Skyline Drive Street Line 2: Street Line 3: Street Line 4: City: \* Malvern State: Pennsylvania (PA) Zip/Postal Co... \* 19355 County: Nation: Effective From: Jul 15, 2010 Effective To: Cancel Complete

Type	Address	Effective From	Effective To
Permanent	531 Skyline Drive Malvern, PA 19355	Jul 15, 2010	


Cancel Add Address Save

3. You may edit the fields as desired, click **Complete** to apply your changes.
4. Click the **Save** button 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 numbers, click the **Edit**  icon in the **Telephone** section.

Bio Data	Contact Information
<h3>Address</h3> <p><b>Permanent:</b> 531 Skyline Drive Malvern, PA 19355 (Effective Jul 15, 2010)</p>	
<h3>Telephone</h3> <p><b>Permanent:</b> 610 555-1212</p> <p>[ ] denotes International Access number</p>	
<h3>E-Mail</h3> <p><b>School email address:</b> Banner.Alumni@yahoo.com (Primary)</p>	
<h3>Instant Message</h3>	

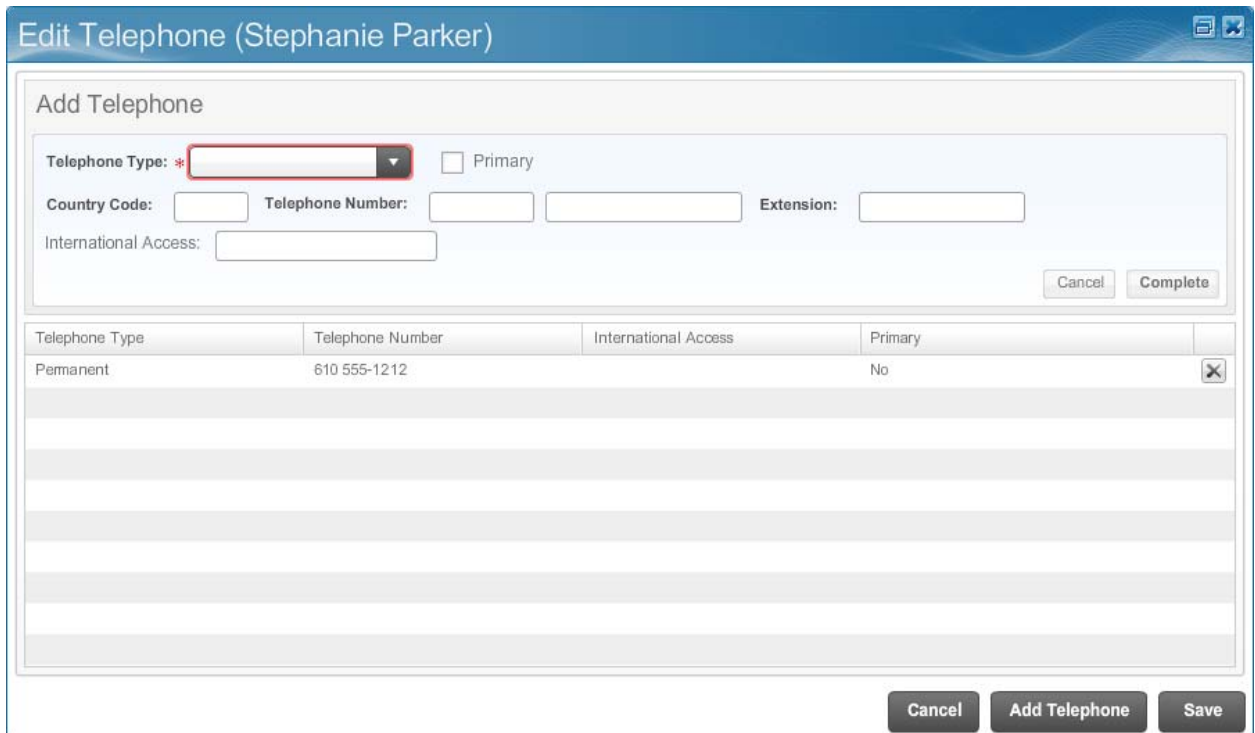
This opens the Edit Telephone window.

[illegible]

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 (Stephanie Parker)

Add Telephone


Telephone Type: \*   ☐ Primary

Country Code:  Telephone Number:   Extension:

International Access:

Telephone Type	Telephone Number	International Access	Primary	
Permanent	610 555-1212		No	<input type="button" value="x"/>




## 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

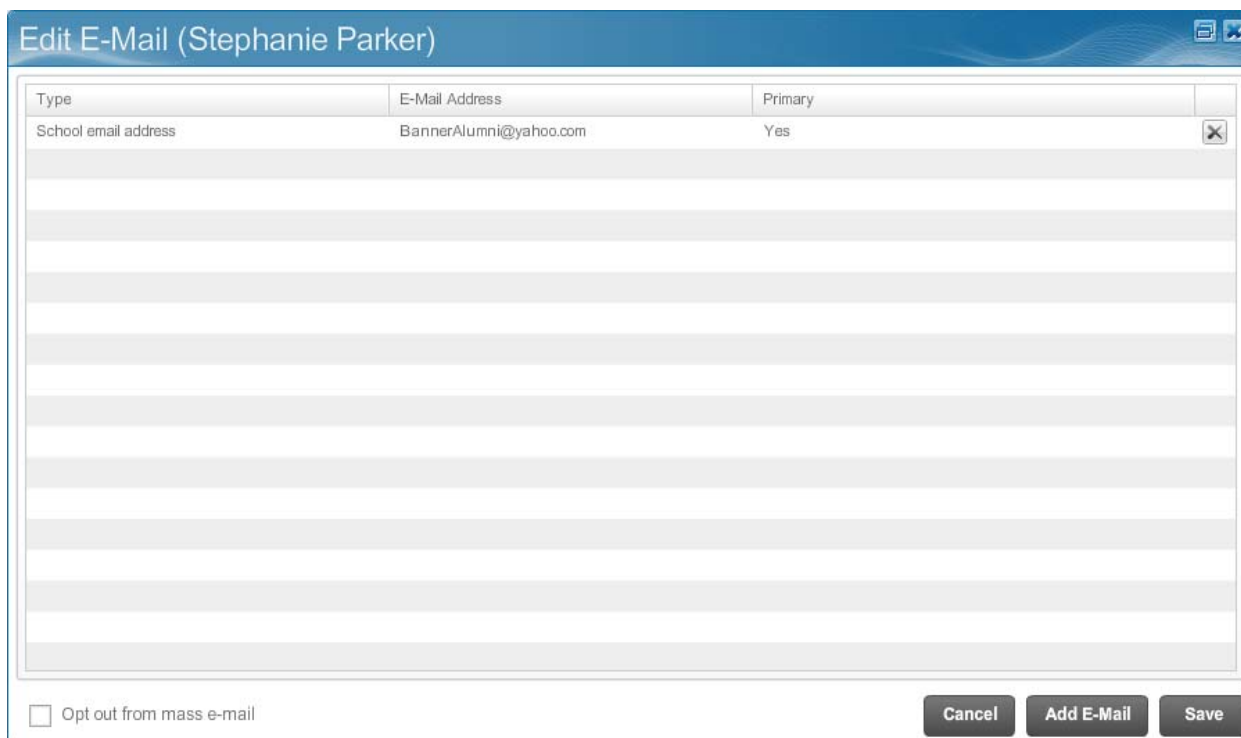
1. Click the **Delete**  icon at the end of the row for the telephone number to be deleted.
2. Click  to keep the change. Click  to abort the deletion.

## Email Information

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




2. The Edit E-Mail window opens.

A screenshot of the "Edit E-Mail (Stephanie Parker)" window. It features a table with three columns: "Type", "E-Mail Address", and "Primary". The first row contains the text "School email address", "BannerAlumni@yahoo.com", and "Yes". Below this row are several empty rows for additional entries. At the bottom left, there is a checkbox labeled "Opt out from mass e-mail". At the bottom right, there are three buttons: "Cancel", "Add E-Mail", and "Save".

Type	E-Mail Address	Primary
School email address	BannerAlumni@yahoo.com	Yes

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

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.

Edit E-Mail (Stephanie Parker)

Add E-Mail

Type: \*  ☐ Primary

E-Mail Address: \*

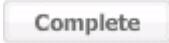
Cancel Complete

Type	E-Mail Address	Primary
School email address	BannerAlumni@yahoo.com	Yes

☐ Opt out from mass e-mail

Cancel Add E-Mail Save




## Add an e-mail

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







- To activate: Check the box and click .

- To deactivate: Uncheck the box and click .

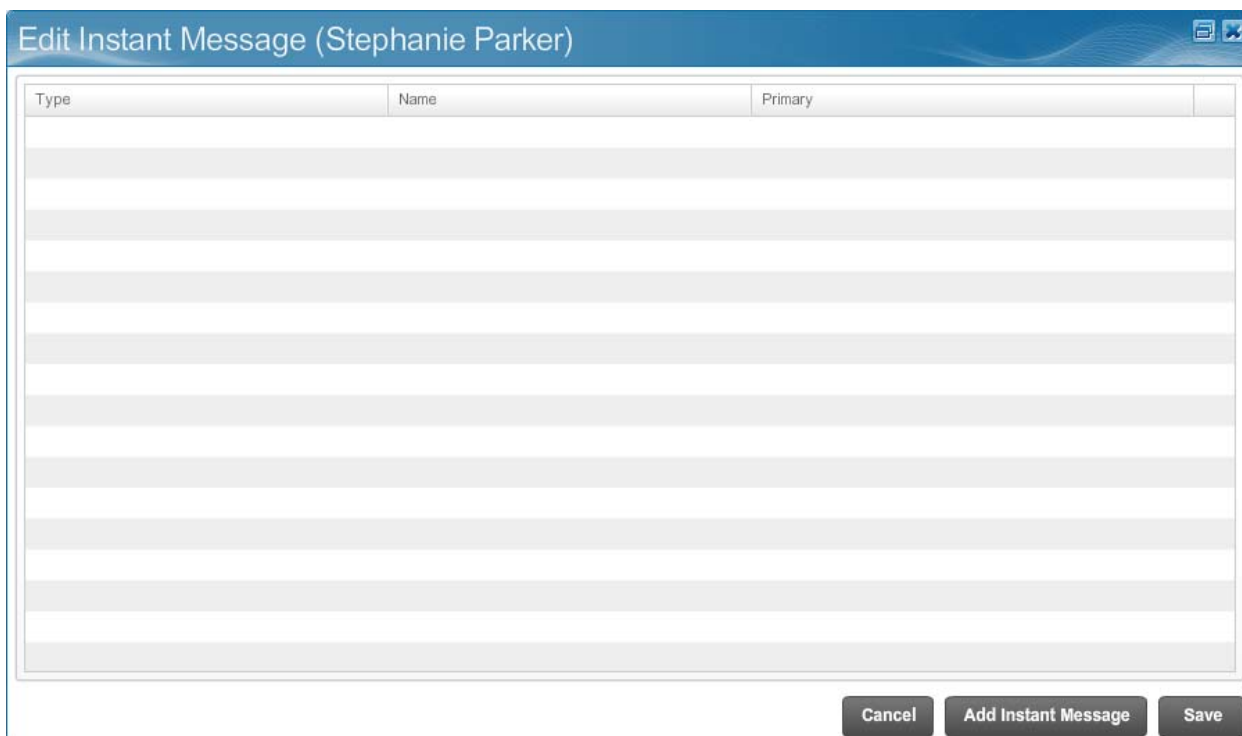
This setting does not prevent a Development Officer from sending a personalized e-mail to the person.

## Instant Message Information

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




2. The Edit Instant Message window will display.

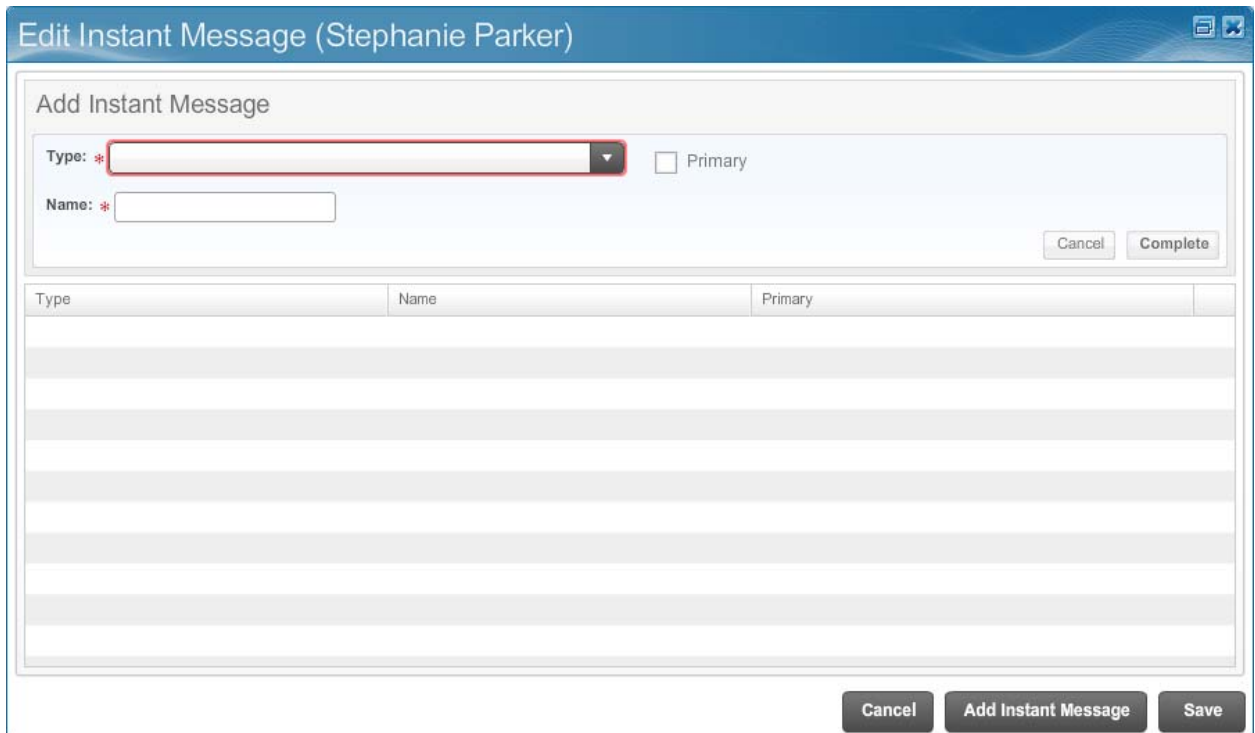
A window titled "Edit Instant Message (Stephanie Parker)" with a blue header bar. The main area contains a table with three columns: "Type", "Name", and "Primary". The table has 15 rows, with the first row highlighted in light gray. At the bottom right of the window, there are three buttons: "Cancel", "Add Instant Message", and "Save".

Type	Name	Primary

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 (Stephanie Parker)

Add Instant Message

Type: \*  ☐ Primary


Name: \*

Cancel Complete

Type	Name	Primary

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.

# Interactions

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## Introduction

An Interaction is a communication, or event, that has taken place between the institution and the Advancement Individual or Advancement Organization. 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 Development Officer to an Advancement Individual sent from within Relationship Management
- a mass mailing generated from a campaign in Relationship Management
- a manual entry by a Development Officer concerning a telephone conversation with an Advancement Individual or Advancement Organization
- a manual entry by a Development Officer indicating that an Advancement Individual has scheduled a face-to-face meeting
- a contact about attending a volunteer opportunity that was entered in Banner on the Contact Form (APACONT).

## Interaction Watch List

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

The initial page allows for query on Interactions by Alumni.

- You can search based on the last name of an alumnae/alumnus.
- 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 Development Officer can monitor any interactions that occur for profiles in the lists within specified time frames. The Development Officer 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 profile is now available from the Interaction Watch List. When you query a Watch List or a list of interactions in Profile Manager and highlight a specific interaction, a **View Profile** link is available in the **More Actions** toolbar. Selecting View Profile opens the profile overview

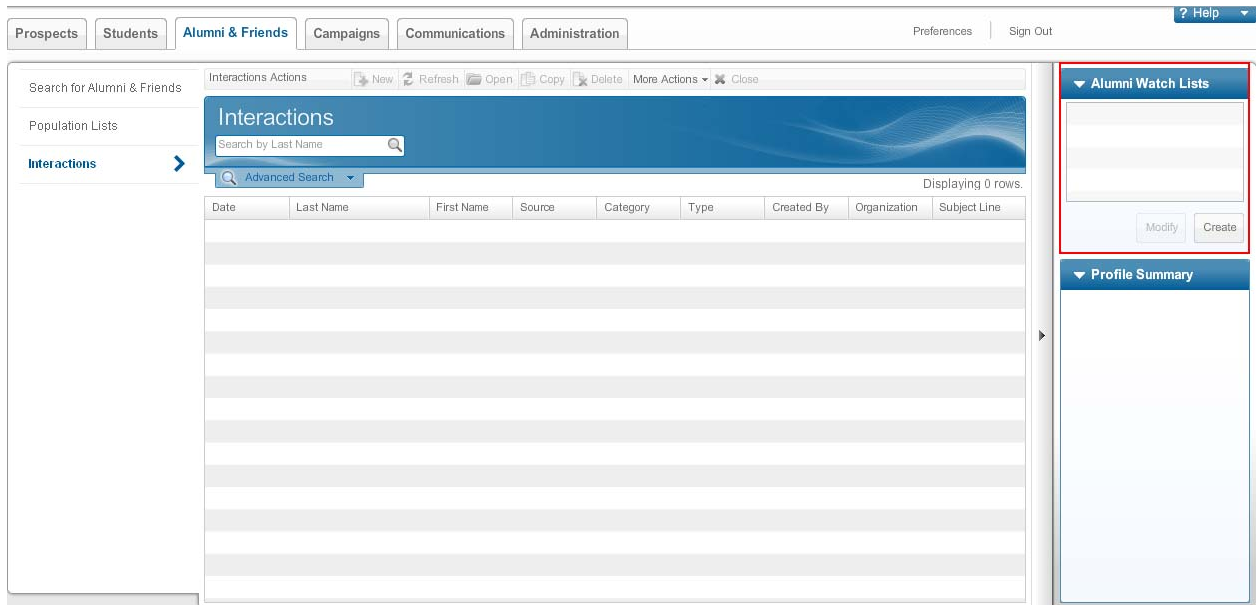
The Watch List Panel is at the upper right hand of the Interactions window. A Watch List can be created at any time while in Interactions.

## 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 of the Profile Manager. The Watch List panel is visible in the upper right hand of the screen.



2. To create a Watch List, click on Create.

The 'Create Watch List' dialog box is shown. It has a title bar with standard window controls. The main area contains two labeled text input fields: 'Name: \*' with the value 'Manual Interactions' and 'Population List: \*' with the value 'ADV Individuals in PA'. The 'Population List' field has a small three-dot menu icon to its right. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

3. Click  to select a population list. The Select Population List window will display. All available population lists are shown.



4. You may search for a specific Population List by entering a name or using Advanced Search.
5. You may select one or more Population Lists to create your own watch list.

Select Population List

Available Population List(s)

Advanced Search

Displaying 1 row.

<input type="checkbox"/>	Population List	Owner	Count
<input type="checkbox"/>	ADV Individuals i...	admin	15
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Selected Population List(s)

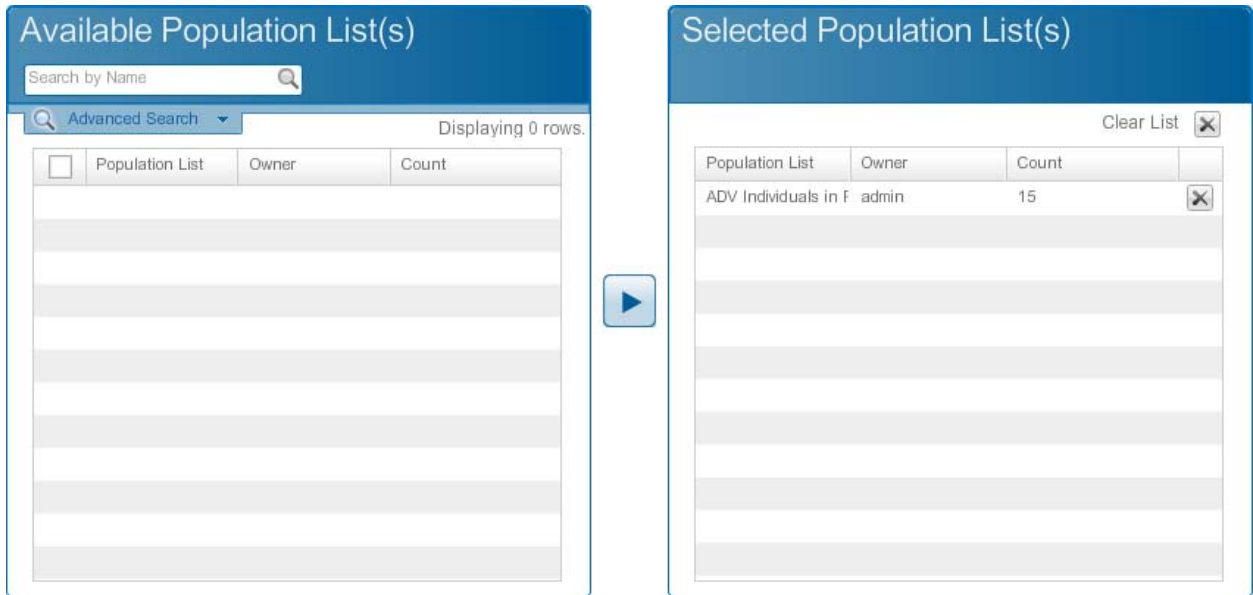
Clear List

Population List	Owner	Count

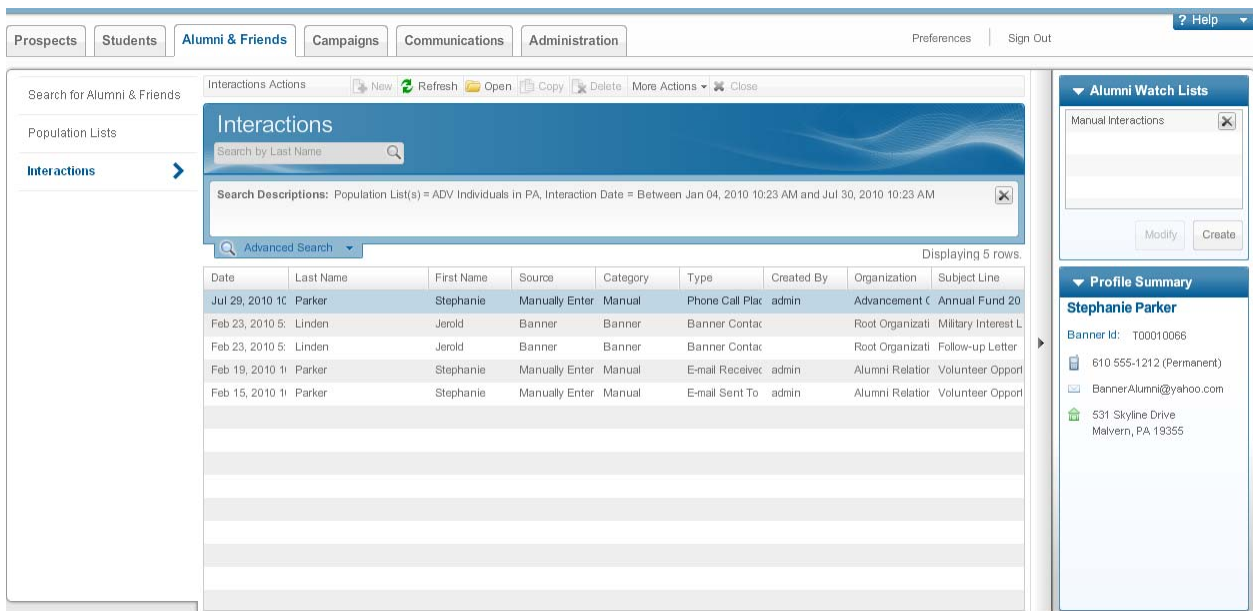
Cancel

Select

- 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.



- Click the **Select** button which will return you to the Create Watch List window.
- Click the **Save** button to return to the Interactions workspace. All profiles applicable to the Watch List you just created will display.



The history of all interactions for a specific profile is stored and the most recent interaction is displayed at the top of the listing in the Profile Interaction window. You can search on a variety of attributes to locate or view an interaction.


The screenshot shows the Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. On the right, there are links for Preferences and Sign Out, and a Help button. The main content area is titled 'Stephanie Parker' and includes a search bar with 'Search by Created By' and an 'Advanced Search' dropdown. Below this is a table of interactions with columns: Date, Source, Category, Type, Created By, Organization, and Subject Line. The table displays three rows of data. To the right of the table are two summary boxes: 'Advancement Summary' and 'Profile Summary'. The 'Profile Summary' box includes fields for Banner Id, phone number, email, and address. At the bottom right of the table area are 'Create Interaction' and 'Contact' buttons.

Date	Source	Category	Type	Created By	Organization	Subject Line
Jul 29, 2010 10:13 A	Manually Entered	Manual	Phone Call Placed	admin	Advancement Office	Annual Fund 2010
Feb 19, 2010 10:16 A	Manually Entered	Manual	E-mail Received From	admin	Alumni Relations	Volunteer Opportunity -- E
Feb 15, 2010 10:15 A	Manually Entered	Manual	E-mail Sent To	admin	Alumni Relations	Volunteer Opportunity -- E

## 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.

**Add New Interaction**

Date: \* Jul 29, 2010 at 10:34 AM

Organization: \* [ ] ...

Category: \* [ ] ...

Type: \* [ ] ...


Subject: \* [ ]

Description: [ ]

**Tags**

[Add Tag](#)

Cancel Save

2. Click the **Calendar** () icon in the **Date** field and select the date of the interaction.
3. Adjust the time of the interaction as desired.
4. Click the **Look Up** icon in the **Organization** field to select the appropriate organization for the interaction.
5. Click the **Look Up** icon in the **Category** field and select the category of the interaction.
6. Click the **Look Up** icon in the **Type** field and select the type of interaction.
7. Enter a subject 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 an alumni has sent to a Development Officer's email account can be copied and pasted here).
9. Click the **Save** button.

## Contact alumni

Advancement Officers can send an e-mail to an Advancement Individual or Advancement Organization directly from the Profile Overview.

**Contact**

**Contact Information** [Use Template](#)

From: admin@sampleschool.edu To: BannerAlumni@yahoo.com

Subject: \* Interaction Category: \*\*\*

Sender Organization: \* \*\*\*

**Message**

Source Paste Undo Redo Bold Italic Underline Text Color Background Color Bulleted List Numbered List Link Unlink

Format Normal Font Times New Roman Size small

Cancel Schedule Send

## Steps

































1. Click the **Contact** button on the Profile Interaction workspace. The Contact window opens.
2. Choose to create a custom message using the Editor Toolbar (shown above) or click the **Use Template** link in the upper right hand corner of the pane to use a defined template. Templates are created in the Communications workspace.

Note: To create text of your communication using the Editor as directed in the *Communications Training Workbook*. 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 Training Workbook*.

3. Click **Send** to send immediately.
4. 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 alumni profiles that share one or more common attributes or groups of attributes. You create a Population List to serve as the target of an campaign or communication.

Population lists are also used to create Interaction Watch Lists. An Advancement Individual or Advancement Organization 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 - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. A search bar for Alumni & Friends is located on the left. The main content area is titled "Population Lists" and features a search bar, a table of existing lists, and a "Population Summary" panel on the right.

Name	Description	Status	Access	Owner	Creation Date	List Count	Last Calculated
ADV Individuals in	Current PA alumni	Available	Personal	admin	Jul 29, 2010 9:54 A	15	Jul 29, 2010 9:53 A

The "Population Summary" panel on the right provides details for the selected list:

- Population Results**
  - Total: 15
  - Last Calculated: Jul 29, 2010 9:53 AM
  - Shared: No
  - Results Locked: No
- Manually Included**
  - Total: 0
- Manually Excluded**
  - Total: 0

Population Lists which you have created are listed in the **My Alumni Lists** 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 List(s) that meet your search criteria display in the workspace.

## Create a Population List

1. From the **Populations List** window in Profile Manager click the **New** button in the action toolbar.
2. (required) Enter a name for the new population list in the **Name** field.

Create Population List

Name: \*

Description:

▼ Expression Options

Expression Name	Parameter

Cancel Add Expression Save

3. Enter a short description for the new population list in the **Description** field.

4. To add an Expression to the population list, click **Add Expression**.

Note: Expressions are created in the Administration workspace. To learn more about Expressions please refer to the *Expressions Training Workbook*.

The screenshot shows a window titled "Add Expressions to Population List". At the top, there is a search bar labeled "Search by Name" with a magnifying glass icon. Below the search bar is a tab labeled "Advanced Search". The main area of the window contains a table with two columns: "Expression" and "Description". The table displays one row: "ADV Individuals in PA" under the "Expression" column and "Current PA alumni/friends" under the "Description" column. The text "Displaying 1 row." is visible in the top right corner of the table area. At the bottom right of the window, there are two buttons: "Cancel" and "Save".

Expression	Description
ADV Individuals in PA	Current PA alumni/friends

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

The screenshot shows a window titled "Create Population List". It has two text input fields: "Name: \*" with a red asterisk and a red border, and "Description:". Below these fields is a section titled "Expression Options" with a dropdown arrow. Inside this section is a table with two columns: "Expression Name" and "Parameter". The table contains one row: "ADV Individuals in PA" under "Expression Name" and "State" under "Parameter". There is a close button (X) in the top right corner of the "Expression Options" section. At the bottom of the window, there are three buttons: "Cancel", "Add Expression", and "Save".

Expression Name	Parameter
ADV Individuals in PA	State

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: \*

Description:

▼ Expression Options

Expression Name	Parameter
ADV Individuals in PA	State

State:

Description: Selects persons living in the state(s) specified.


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

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

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

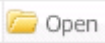
## Delete a Population List

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 the **Delete** button  on the Population List Actions toolbar.
3. **Confirm** the deletion.

# Population List Overview

## Overview

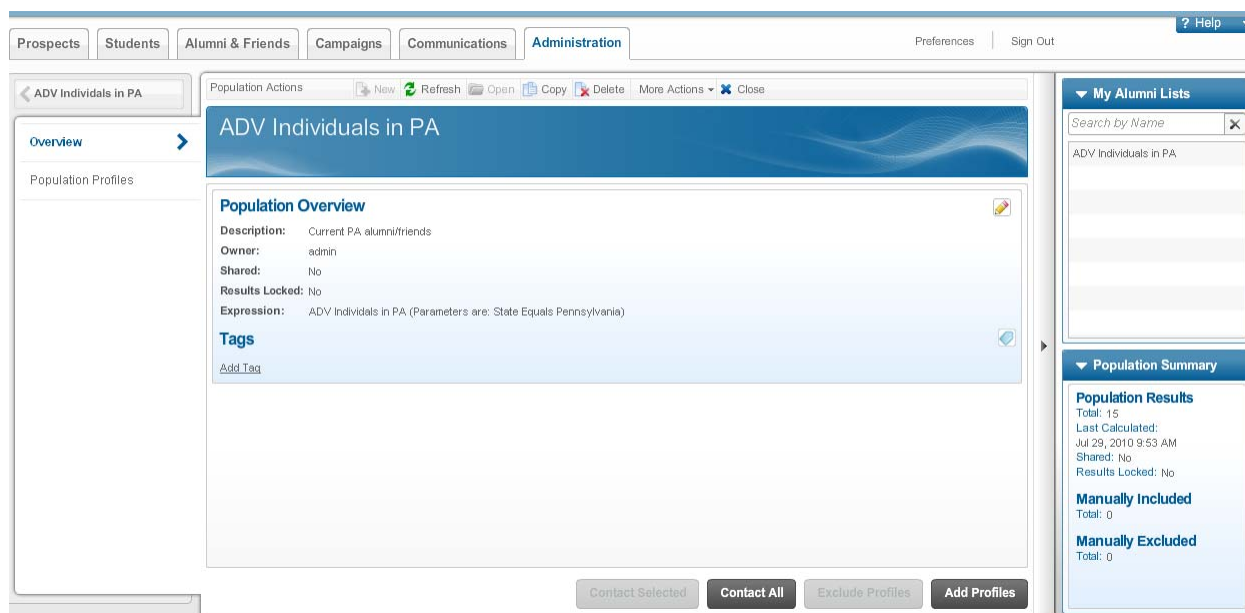
To open the Population List Overview window, select a population list and click  from the toolbar or double click the entry name.

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 aspects of the list, and continue to refine the list by adding profiles. You can also send a contact to all alumni in the list using the Contact All function.



The screenshot displays the Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is active, showing a toolbar with options like New, Refresh, Open, Copy, Delete, and More Actions. The main content area is titled 'ADV Individuals in PA' and contains a 'Population Overview' section. This section lists details: Description (Current PA alumni/friends), Owner (admin), Shared (No), Results Locked (No), and Expression (ADV Individuals in PA (Parameters are: State Equals Pennsylvania)). Below this is a 'Tags' section with an 'Add Tag' link. The right sidebar features 'My Alumni Lists' with a search bar and a list of lists, and a 'Population Summary' section. The Population Summary section includes 'Population Results' (Total: 15, Last Calculated: Jul 29, 2010 9:53 AM, Shared: No, Results Locked: No), 'Manually Included' (Total: 0), and 'Manually Excluded' (Total: 0). At the bottom of the main content area are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'.

Your personal Population Lists will appear in the **My 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 Alumni 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 alumni in the list, and can see which Expressions are used to create the list, as well as any manually included or excluded alumni 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 alumni.

- **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 Alumni 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



Banner Relationship Management's release 1.3 provides users the ability to 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.

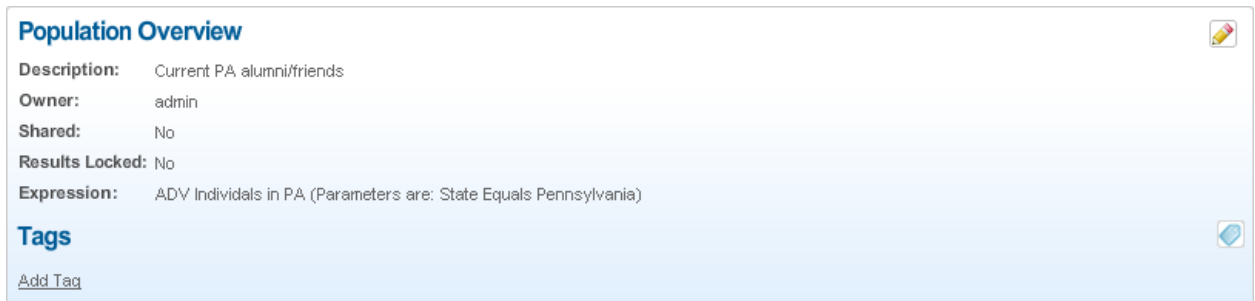
Use the **Tag** icon to open and edit the existing list of tags associated with the entity. If no tags exist, the overview displays the **Add Tag** link. Click the link or the **Tag** icon to add any available tags to the item directly from its overview page.

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 Banner Relationship Management interface. At the top, there is a navigation bar with tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is selected. Below the navigation bar, there is a sidebar on the left with a link to 'ADV Individuals in PA'. The main content area is titled 'ADV Individuals in PA' and contains a 'Population Overview' section. This section includes fields for Description, Owner, Shared, Results Locked, and Expression. Below these fields is a 'Tags' section with a text input field labeled 'Enter Tag(s) separated by comma' and a 'Close' button. Underneath the input field is a section titled 'Available Tags' with links for 'Alumni Volunteer', 'Solicitor Organization', and 'Solicitor Volunteer Lead'. At the bottom of the main content area, there are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'. On the right side of the interface, there is a sidebar with a 'My Alumni Lists' section and a 'Population Summary' section. The 'Population Summary' section includes a 'Population Results' table with columns for Total, Last Calculated, Shared, and Results Locked, and a 'Manually Included' table with a Total column.

## Edit a population list

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



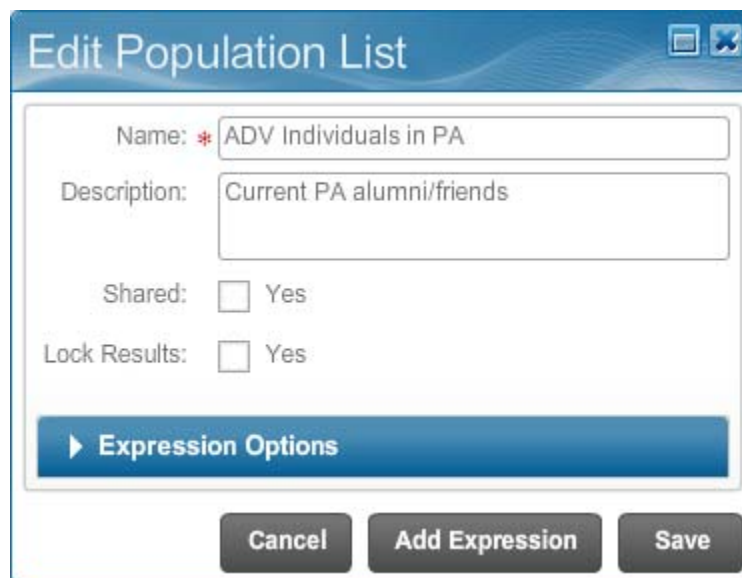
**Population Overview**

**Description:** Current PA alumni/friends  
**Owner:** admin  
**Shared:** No  
**Results Locked:** No  
**Expression:** ADV Individuals in PA (Parameters are: State Equals Pennsylvania)

**Tags**

[Add Tag](#)

This opens the Edit window.



**Edit Population List**

Name: \* ADV Individuals in PA


Description: Current PA alumni/friends

Shared: ☐ Yes

Lock Results: ☐ Yes


► Expression Options

Cancel Add Expression Save

3. Edit the fields as needed:
  - **Name** – (required) Modify the name of the Population List.
  - **Description** – Modify the description of the Population List.
  - **Shared** – Select the **Shared** checkbox to allow the 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 the **Add Expression** button 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 manually add alumni to a list 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 an alumnae/alumnus 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. Click the **Add Profiles** button  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 the **Add** button.

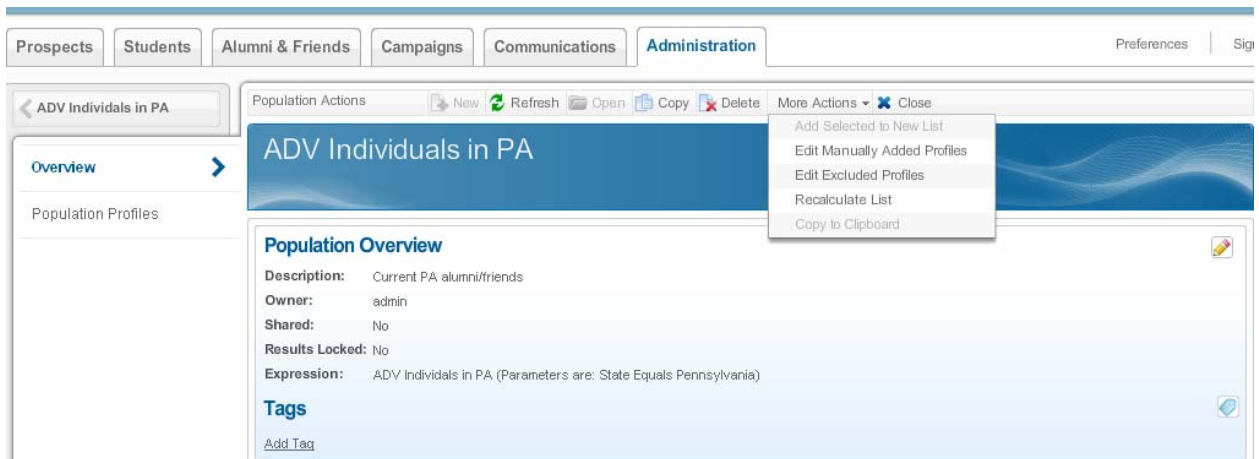


## Contact all alumni in a population list

1. Click the **Contact All** button  to send an e-mail message to all alumni in the list.
2. Compose the e-mail. For further instructions regarding this screen go to the **Interactions** section of this workbook.
3. Click the **Schedule** button to assign a specific date and time that this e-mail will be sent to the recipients. Or, click the **Send** button to immediately send the message.

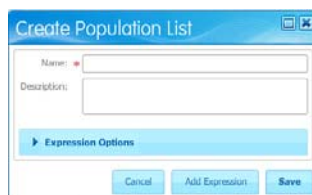
## More Actions

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.



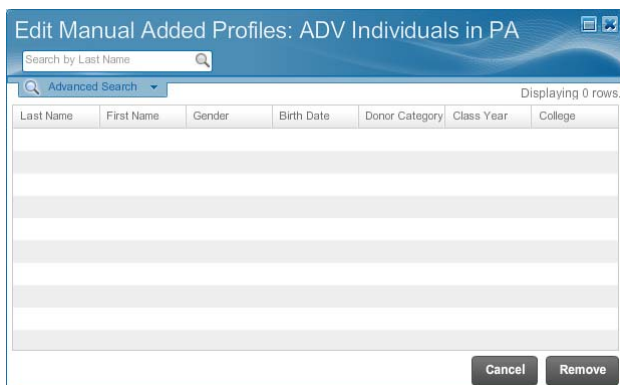
## Add Selected to New List

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.



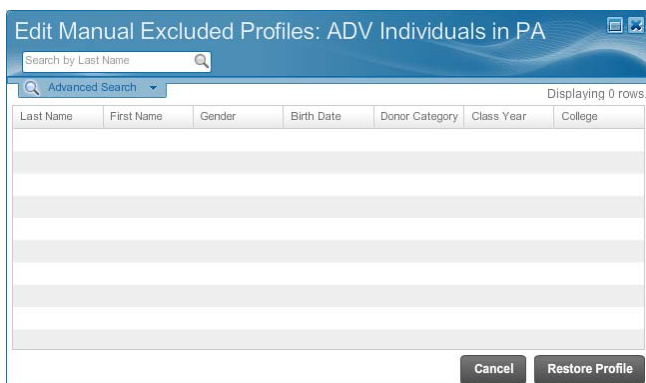
## Edit Manually Added Profiles

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 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.



## 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 Profile

## Population Profile

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. With Release 1.3 you can now include a concatenated list of all the active telephone numbers in addition to other copied profile information.

The screenshot displays the Banner Relationship Management - Alumni & Friends interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends (selected), Campaigns, Communications, and Administration. A search bar for Alumni & Friends is located on the left. The main content area is titled "Population Lists" and features a search bar and a table of population lists. The table has columns for Name, Description, Status, Access, Owner, Creation Date, List Count, and Last Calculated. The first row shows "ADV Individuals in Current PA alumni" with a status of "Available", access of "Personal", owner of "admin", creation date of "Jul 29, 2010 9:54 A", list count of "15", and last calculated date of "Jul 29, 2010 9:53 A". The right sidebar contains a "My Alumni Lists" section with a search bar and a "Population Summary" section with "Population Results" (Total: 15, Last Calculated: Jul 29, 2010 9:53 AM, Shared: No, Results Locked: No), "Manually Included" (Total: 0), and "Manually Excluded" (Total: 0).

Name	Description	Status	Access	Owner	Creation Date	List Count	Last Calculated
ADV Individuals in	Current PA alumni	Available	Personal	admin	Jul 29, 2010 9:54 A	15	Jul 29, 2010 9:53 A


## Add alumni to a list

You can add alumni 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 the **Open** button .
3. Click the **Add Profiles** button 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 Development Officer. 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 the **Open** button .
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 the **OK** button.

## Contact profiles in a population list

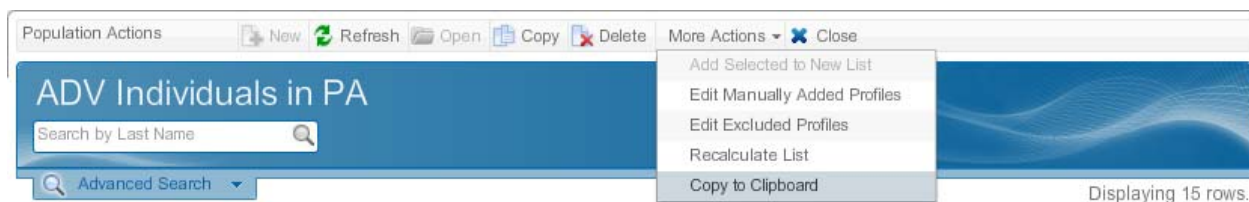
To contact all profiles in a Population List, follow these steps:

1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button .
3. Click **Contact All** to send an e-mail message to all alumni 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.

To contact selected profiles in a Population List follow these steps:

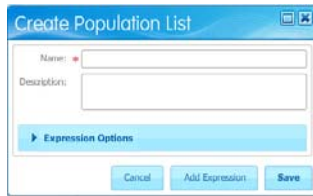
1. Search for and select the Population List that you would like to edit.
2. Click the **Open** button .
3. Select **Population Profiles**.
4. Select the profiles to contact from the Population List. To select more than one profile in the list use the Shift key or the Control key.
5. Click **Contact 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

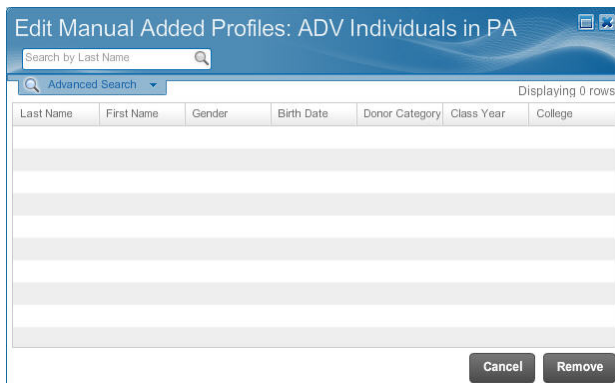
This function allows you to add selected members of the current Population List to a new list by creating a new Population List. See the **Create a New Population List** section for more details.



The 'Create Population List' dialog box features a title bar with standard window controls. It contains two text input fields: 'Name:' and 'Description:'. Below these is a blue button labeled 'Expression Options'. At the bottom are three buttons: 'Cancel', 'Add Expression', and 'Save'.

## Edit Manually Added Profiles

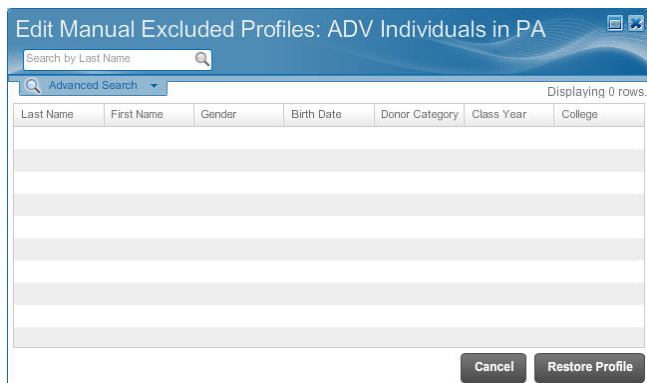
This function allows you to edit the profiles that were manually added to the current Population List. Select the profile you wish to remove from the list and click the **Remove** button.



The 'Edit Manual Added Profiles: ADV Individuals in PA' window has a title bar with standard window controls. It includes a search bar labeled 'Search by Last Name' with a magnifying glass icon. Below the search bar is an 'Advanced Search' dropdown menu. A table with the following headers is displayed: Last Name, First Name, Gender, Birth Date, Donor Category, Class Year, and College. The table body is currently empty, with a status message 'Displaying 0 rows.' at the top right. At the bottom right of the window are two buttons: 'Cancel' and '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.



## 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 alumni 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 alumni 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. 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.

# Appendix A – Tags





# Using Tags

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## 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:

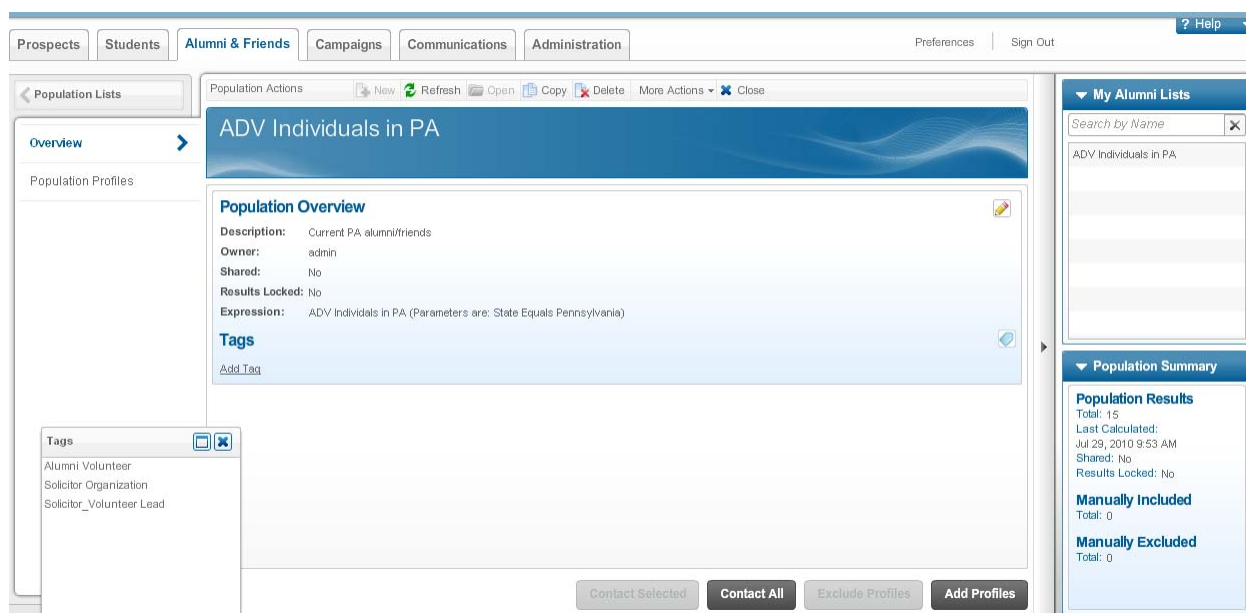
- Expressions
- Populations
- Templates
- Campaigns
- Interactions

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

## Introduction

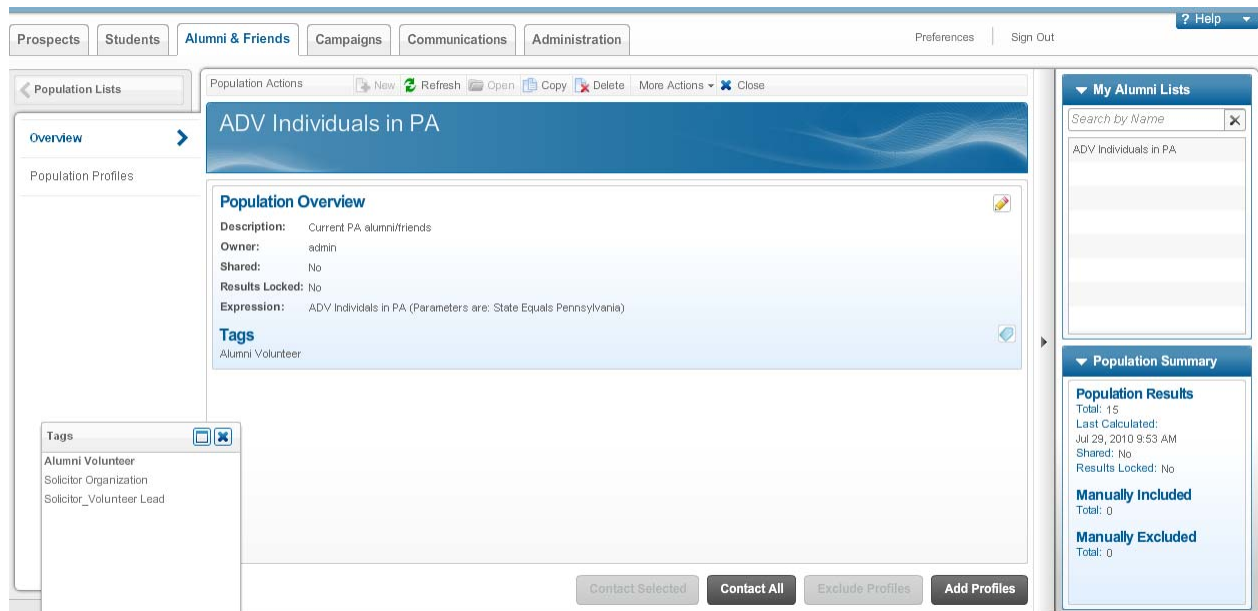
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (🏷️) icon or by clicking the **Add Tags** link on an overview page.



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

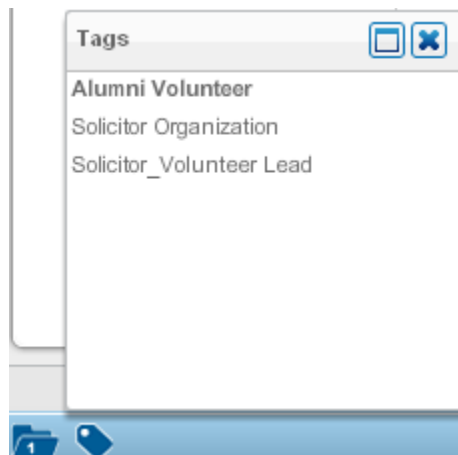
## Applying tags from the Tags Display Interface

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 **Alumni Volunteer** in the example below. Multiple tags can be applied to an item.



## Unapplying tags

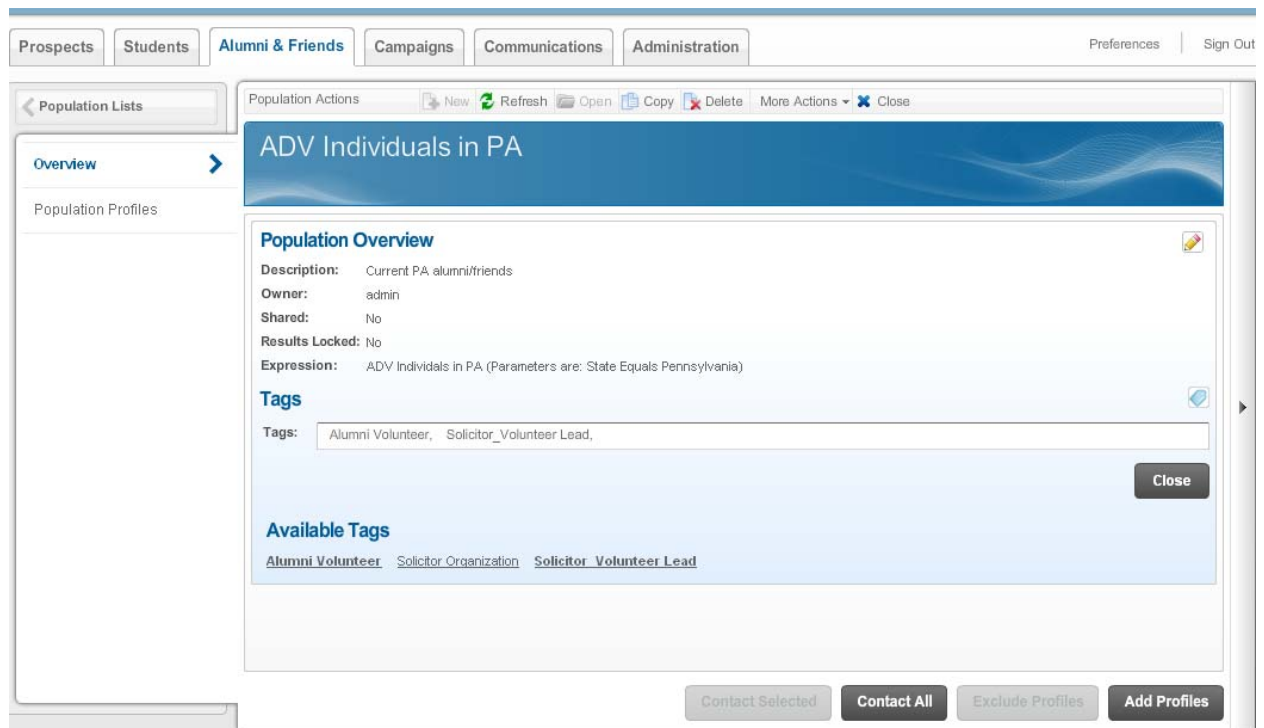
To unapply a tag, double-click it. It should change from being bolded to normal case, and it will be removed from the item's summary.



## 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.



## 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

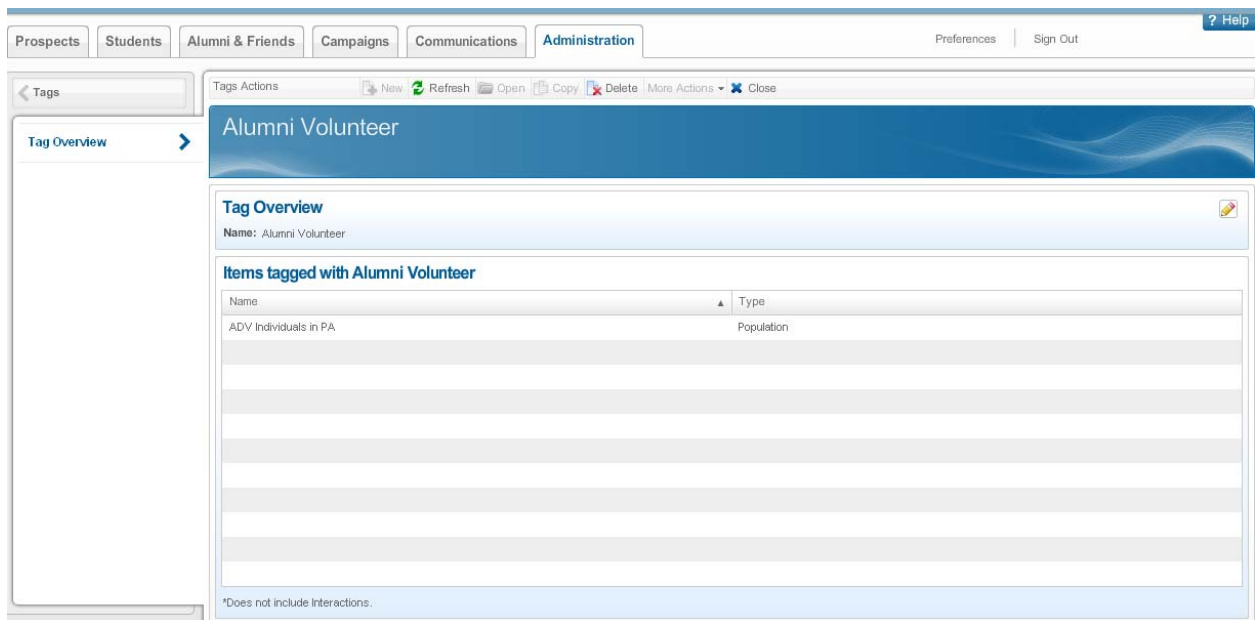
Once a tag has been applied to items in the Relationship Management system, you can use the Tags menu on the Administration tab to view all items to which that tag has been applied.


The screenshot shows the Banner Relationship Management system interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is active, and the Tags menu is selected. The main content area displays a table of tags with columns for Name, Added By, Added Date, and Count of Associations\*. The table shows three rows of data: Alumni Volunteer, Solicitor Organization, and Solicitor\_Volunteer Lead. The table is titled 'Tags' and includes a search bar and an 'Advanced Search' button. The footer of the table indicates 'Displaying 3 rows.' and a note '\*Does not include Interactions.'

Name	Added By	Added Date	Count of Associations*
Alumni Volunteer	admin	Jul 29, 2010 11:25 AM	1
Solicitor Organization	admin	Jul 29, 2010 11:26 AM	0
Solicitor_Volunteer Lead	admin	Jul 29, 2010 11:26 AM	1

## 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 the Tag Overview block.

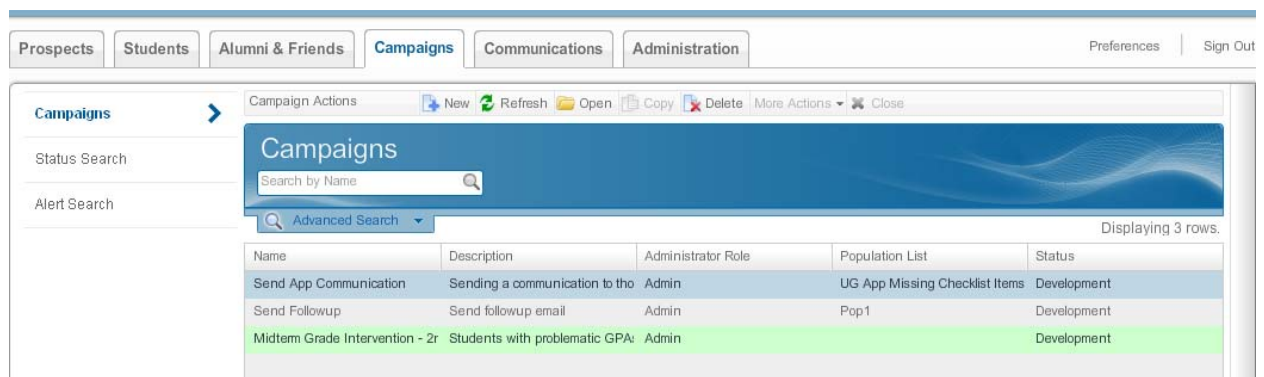
# Search for Tagged Items

## 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.



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



- Select Tags for Search

Available Tags

Advanced Search

Displaying 3 rows.

<input type="checkbox"/>	Name	Added Date	Added By	Tag Count
<input type="checkbox"/>	Solicitor Orga...	Jul 29, 2010 1	admin	0
<input type="checkbox"/>	Solicitor_Vol...	Jul 29, 2010 1	admin	1
<input type="checkbox"/>	Alumni Volu...	Jul 29, 2010 1	admin	1
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Selected Tags


Clear List


Name	Added Date	Added By	Tag Count	



Cancel

Select

- ## Campaigns



**Search Descriptions:** Tags = Alumni Volunteer

 [Advanced Search](#) 

Displaying 0 rows.

Name	Description	Administrator Role	Population List	Status



## 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.