

Banner Enrollment Management Relationship Management Interactions Workbook

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Publication Date	Summary
04/30/2008	New version that supports Enrollment Management Suite 1.0 software.
09/02/2008	Updated to support Relationship Management 1.1 software.
4/3/2009	Updated to support Relationship Management 1.2 software.
10/09/2009	Revised to support Relationship Management 1.3 (new name and features).
12/17/2009	Revised to fix formatting errors.
08/13/2010	Revised to support Relationship Management 1.4 (updated screenshots).

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Think before you print.

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Interactions



Course goal

The goal of this workbook is to provide information about Interactions in Relationship Management.

Course objectives

At the end of this training workbook you will be able to understand how Interaction Categories and Watch Lists(s) can be defined.

Intended audience

Admissions Office, Students Services, and Alumni Office staff who are responsible for creating and maintaining interactions with prospective students, current students, alumni, and/or friends.

Interactions

Introduction

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

Examples of Interactions include:

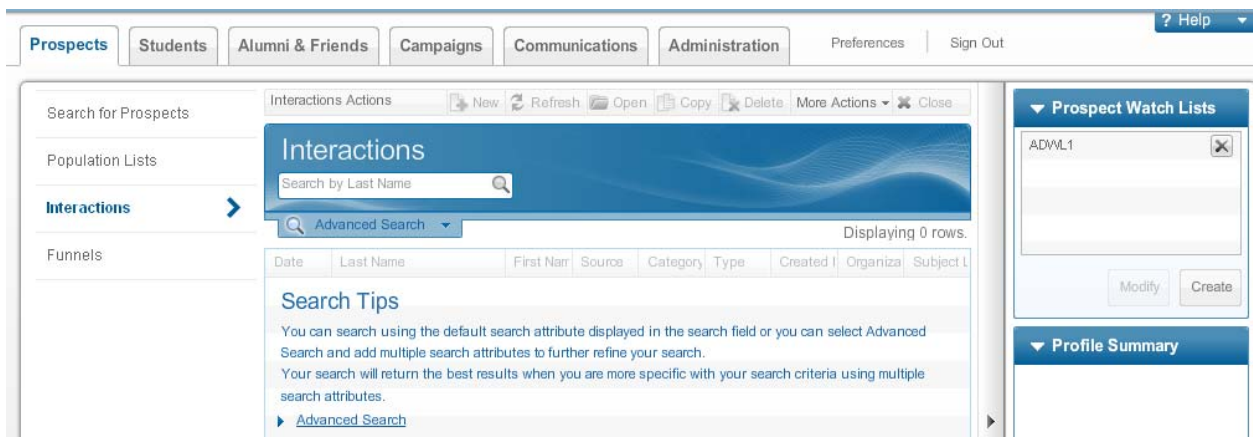
- an e-mail contact from a recruiter to a prospective student sent from within Relationship Management
- a mass mailing generated from a campaign in Relationship Management
- a targeted announcement generated from within Relationship Management and displayed in the prospect's Prospective Student Portal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

Searching Interactions

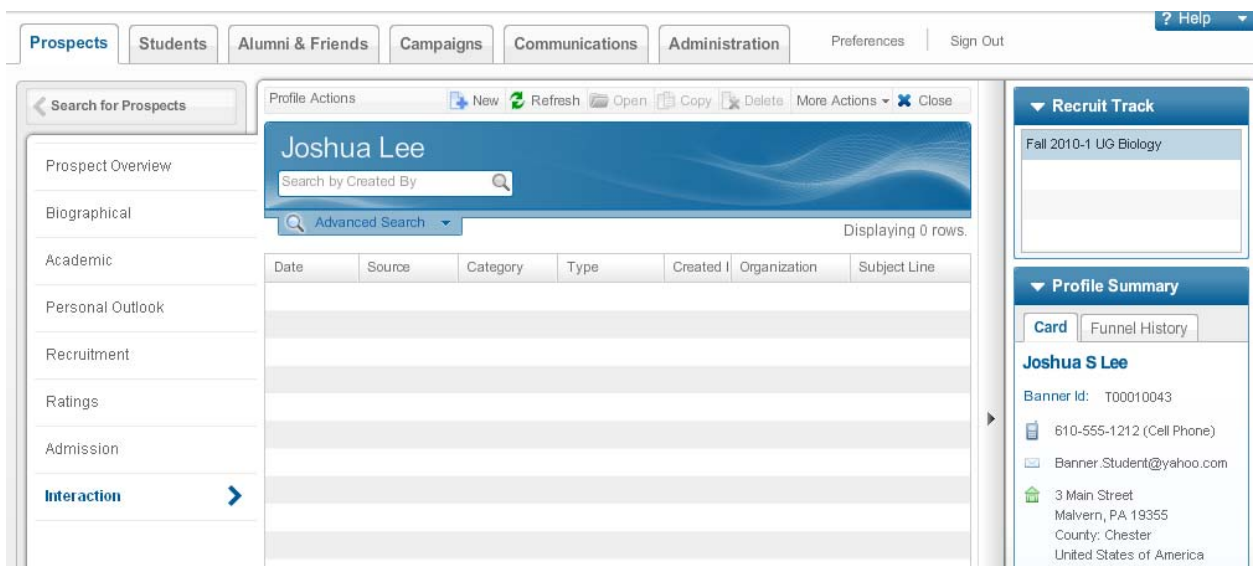
The history of all interactions is stored and the most recent interaction is displayed at the top of the listing in the Interaction window. You can search on a variety of attributes to locate or view an interaction.

You can search all interactions from two locations in the profile manager, as illustrated here. In both cases, additional search attributes are available from Advanced Search.

- Search ALL Interactions for all prospects from the **Interactions** link in the navigation panel on the **Prospects**, **Students**, or **Alumni & Friends** tab. From here you can also create a Watch List.



- Search Interactions from the context of a specific profile (such as a prospect, student, or alumni/friend) after performing a profile search.



Interaction Categories

An administrator can define and maintain categories of interactions that fit your institution's needs. The administrator is assigned an appropriate permission to add, change, and remove category values and maintain the list of categories used for interactions. The ability to create interaction categories resides on the **Administrator** Tab.

When your institution can be more specific in recording interactions, you can better analyze successful interactions and better segment prospects for targeted marketing campaigns. Having more specific codes allows you to determine who responds best to certain types of communications and then to interact with them in that way. It also allows you to determine whether certain messages are better received using certain communication methods.

Combined with tags, this functionality allows you to customize interaction records for more granular tracking and reporting.

The interaction categories you create are available to users when entering manual interactions for a profile. Users can also specify the interaction category on a communication template and ad hoc contact, and that category will be used to create the resulting interaction in place of the default categories. The administrator specifies which categories are available for manual interactions and communications.

Interaction categories are available as expression attributes in the Expression Builder.

Creating Interaction Categories

Steps

To create new interaction categories:

1. Make sure that you have been assigned the appropriate permission.
2. Click **Categories** in the Navigation panel of the **Administration** Tab.
3. Click on **Interaction Categories** in the panel. This will cause existing categories to display.

Interaction Categories Act... New Refresh Open Copy Delete More Actions Close

Interaction Categories

Search by Name

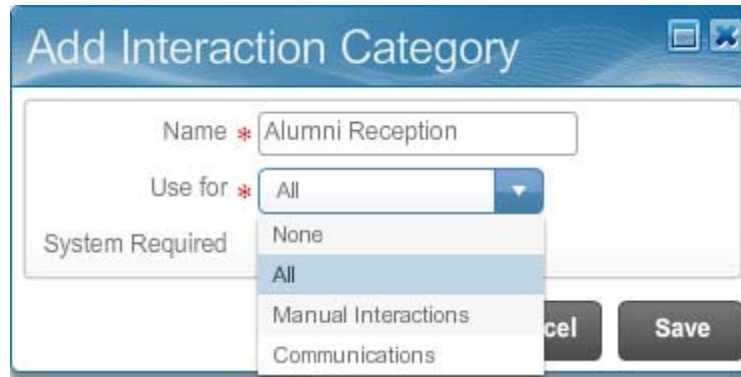
Advanced Search

Displaying 13

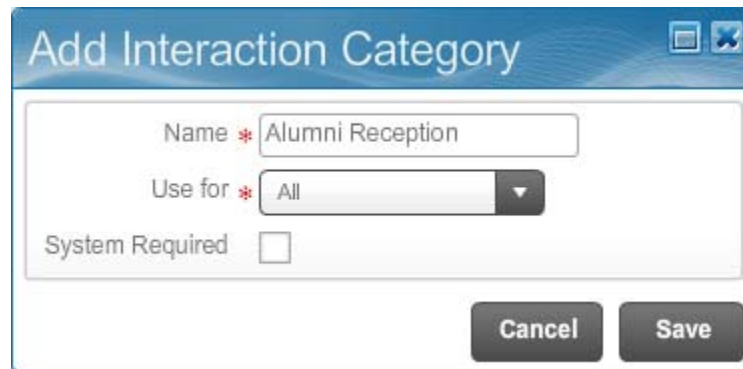
Categories	Use for	System Required
Advisor Appointment	All	No
At Risk Consultation	All	No
Athletic Recruiting	All	No
Banner	None	Yes
Campaign	None	Yes
E-mail	Communications	Yes
Letter	Communications	Yes
Manual	Manual Interactions	Yes
Portal	None	Yes
Probation contact	All	No
Targeted Announcement	Communications	Yes
Tutoring Session	Manual Interactions	No
Unspecified	All	Yes

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4. Click on **New** to create a new Category.
5. Enter a name for the interaction category in the **Name** field.
6. Select whether the new interaction will be tracking All Interactions, Manual Interactions or Communications in the **User for** field.



The screenshot shows the 'Add Interaction Category' form. The 'Name' field contains 'Alumni Reception'. The 'Use for' dropdown menu is open, showing options: 'None', 'All' (highlighted), 'Manual Interactions', and 'Communications'. The 'System Required' checkbox is unchecked. 'Cancel' and 'Save' buttons are at the bottom right.



The screenshot shows the 'Add Interaction Category' form. The 'Name' field contains 'Alumni Reception'. The 'Use for' dropdown menu is closed, showing 'All'. The 'System Required' checkbox is unchecked. 'Cancel' and 'Save' buttons are at the bottom right.

7. Provide an Internal Code for this interaction category, if system required.

Note: This field is available when the **System Required** box is checked. Only the Administrator role has the capability to alter system-required entities.

The internal code can be one of these values:

- Banner
- BannerCampaign
- CampaignE-mail
- EmailLetter
- LetterManual
- ManualPortal
- PortalTargeted Announcement
- TargetedAnnouncementUnspecified
- Unspecified

8. Click the **Save** button.

Overall category administration is envisioned to be an admin role. To create Interaction Categories the administration needs the permission SR_INTERACTION_ADMIN assigned to their role.

Interaction categories that support system oriented features or functions, i.e. things that EM will do on behalf of the user, are "system required".

Watch Lists

Watch List

Watch List functionality is accessible from the any profile manager (Prospects, Students, or Alumni & Friends) by clicking **Interactions** in the navigation panel on the left of the screen.

The initial page allows for query on Interactions by name.

- You can search based on the last name of a profile
- 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 staff member can monitor any interactions that occur with profiles in the lists within the specified time frames. For example, a recruiter can quickly and easily access and view the most recent interactions related to any prospect profiles of interest, without having to drill down to each profile.

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 the Interactions function.

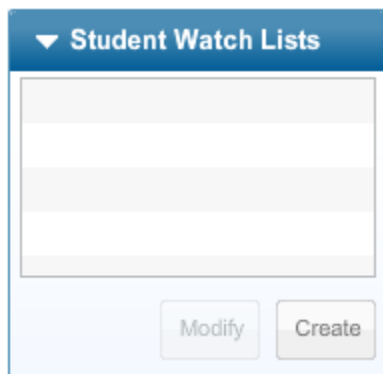
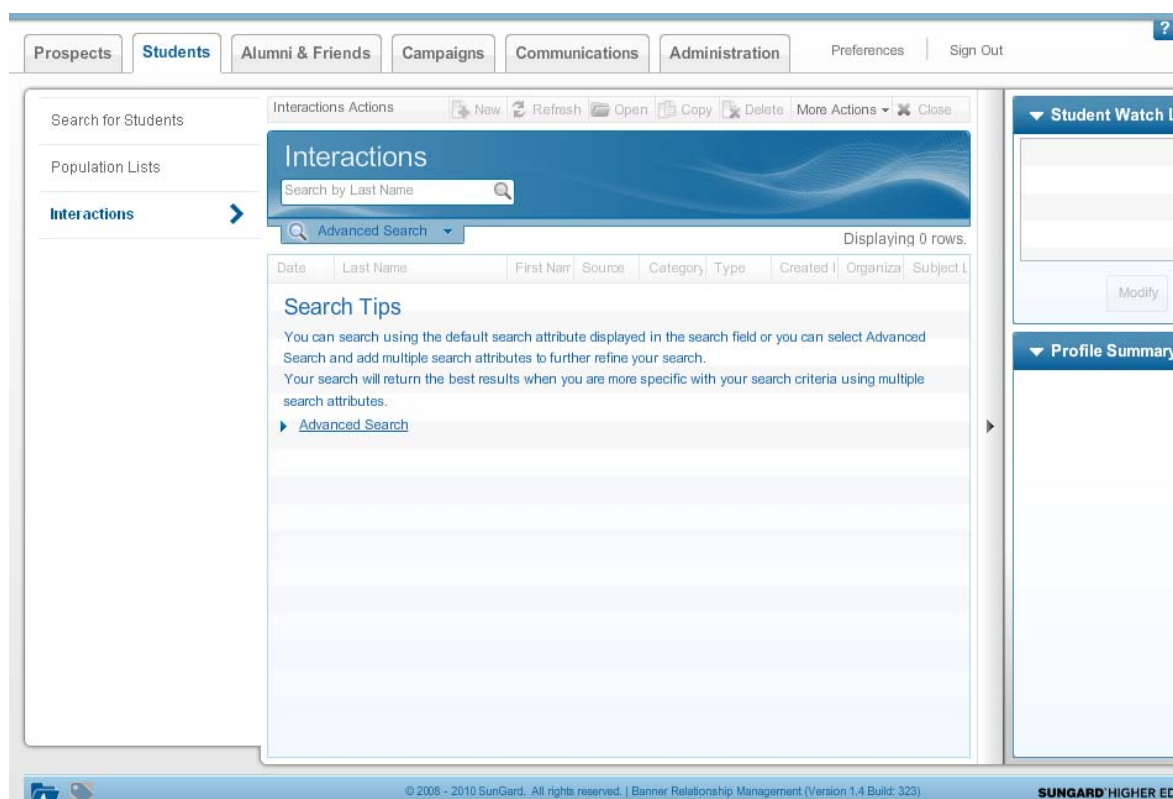
Characteristics of a Watch List

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

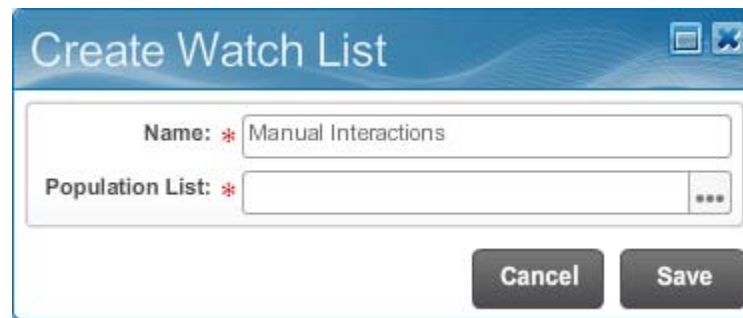
Creating a Watch List

Steps


1. Click on **Interactions** on the Navigation Panel of the profile manager (**Prospects**, **Students**, or **Alumni & Friends** tab). The Watch List panel is visible in the upper right hand of the screen.

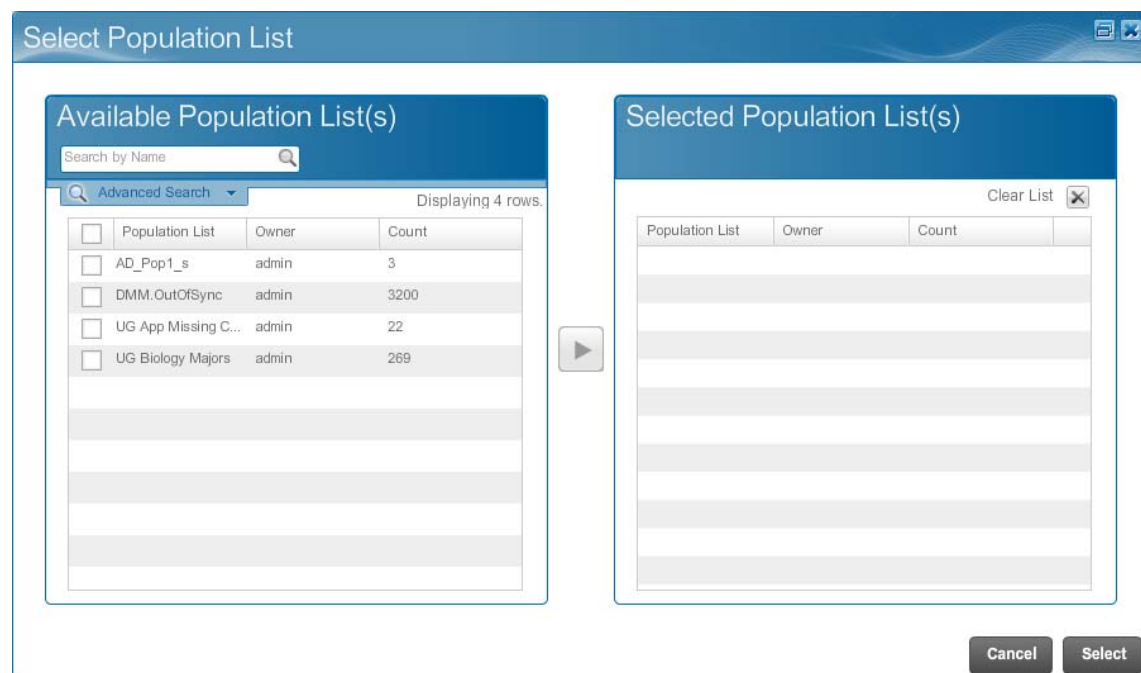


2. To create a Watch List, click on **Create**.



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

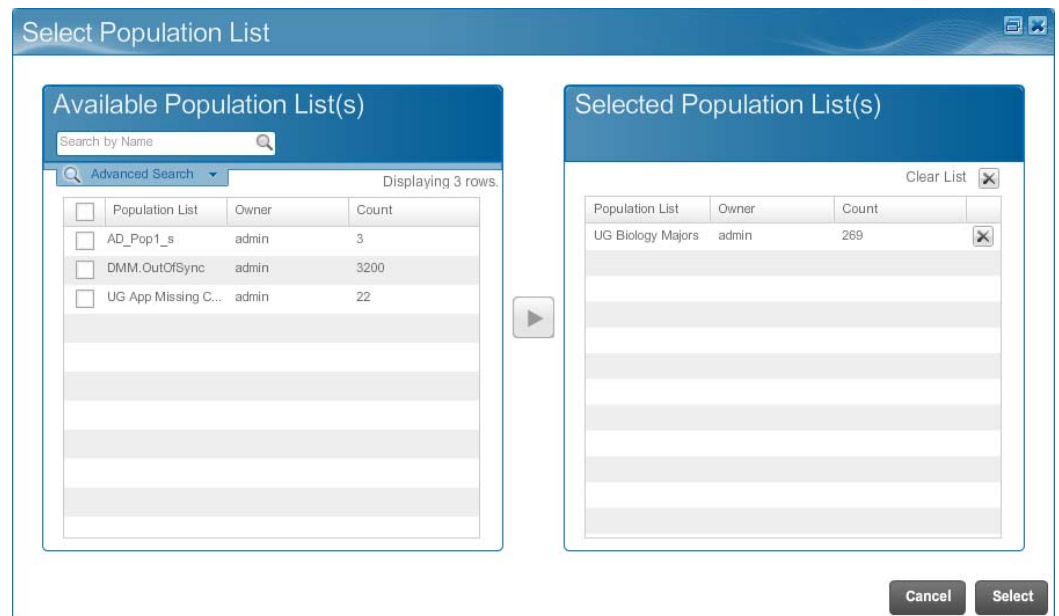
3. Click the Populations List **Look Up** icon  to select a population list. The Select Population List window will display all available Population Lists.
4. You may search for a specific Population List by entering a name or by using Advanced Search.
5. You may select one or more Population Lists to create your own list.



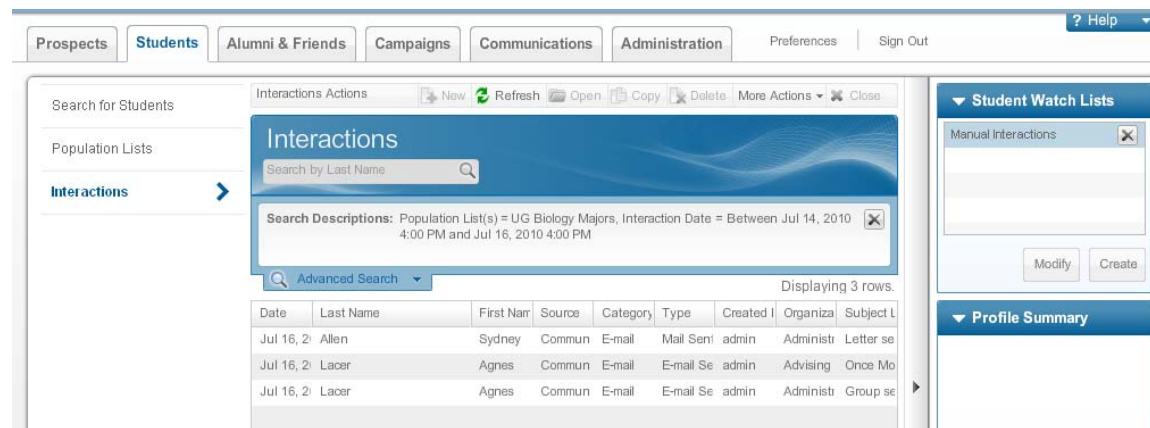
The 'Select Population List' dialog box has a blue header with the title 'Select Population List'. It is divided into two main sections: 'Available Population List(s)' on the left and 'Selected Population List(s)' on the right. The 'Available' section has a search bar with 'Search by Name' and a magnifying glass icon, and a dropdown menu set to 'Advanced Search'. Below this is a table with columns 'Population List', 'Owner', and 'Count'. It shows 4 rows of data. The 'Selected' section has a 'Clear List' button with an 'X' icon and an empty table with the same columns. A right-pointing arrow button is between the two sections. At the bottom right are 'Cancel' and 'Select' buttons.

Population List	Owner	Count
<input type="checkbox"/> AD_Pop1_s	admin	3
<input type="checkbox"/> DMM.OutOfSync	admin	3200
<input type="checkbox"/> UG App Missing C...	admin	22
<input type="checkbox"/> UG Biology Majors	admin	269

- Click the arrow between the panels to move the highlighted Population List to the Selected Population List(s) panel.



- Click Select which will cause the Profiles to display in the List you have just created.



- You can also delete the list you created by clicking the "X" in the Population List panel.

Importing External Interactions

Importing External Interactions

You can import manual interaction data into Relationship Management. This capability is useful, for example, when you wish to record the manual interactions of a mailing conducted by an external mailing house.

This procedure offers several advantages:

- Data is synchronized in 'real time'. Because this is a table-to-table integration, it is not dependent on the Relationship Management application being active at the time the interaction occurs.
- The Interaction table becomes a one-point source of all interaction log data in Relationship Management.

The process works as follows:

- You transform your manual interaction source data from your external system into an XML format.
- The vocabulary is constrained by an XML schema. Therefore, the XML you wish to import must validate against this XML schema. The XML schema is called **interactionloggingservice_v1_2.xsd** and can be found in the Enrollment Management system source tree.

This process will normally be undertaken by a System Administrator. For more information, please refer to the Relationship Management Administration Guide.

Appendix A: Tags



Using Tags

Description

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

Taggable items

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

- Expressions
- Populations
- Templates
- Campaigns
- Interactions

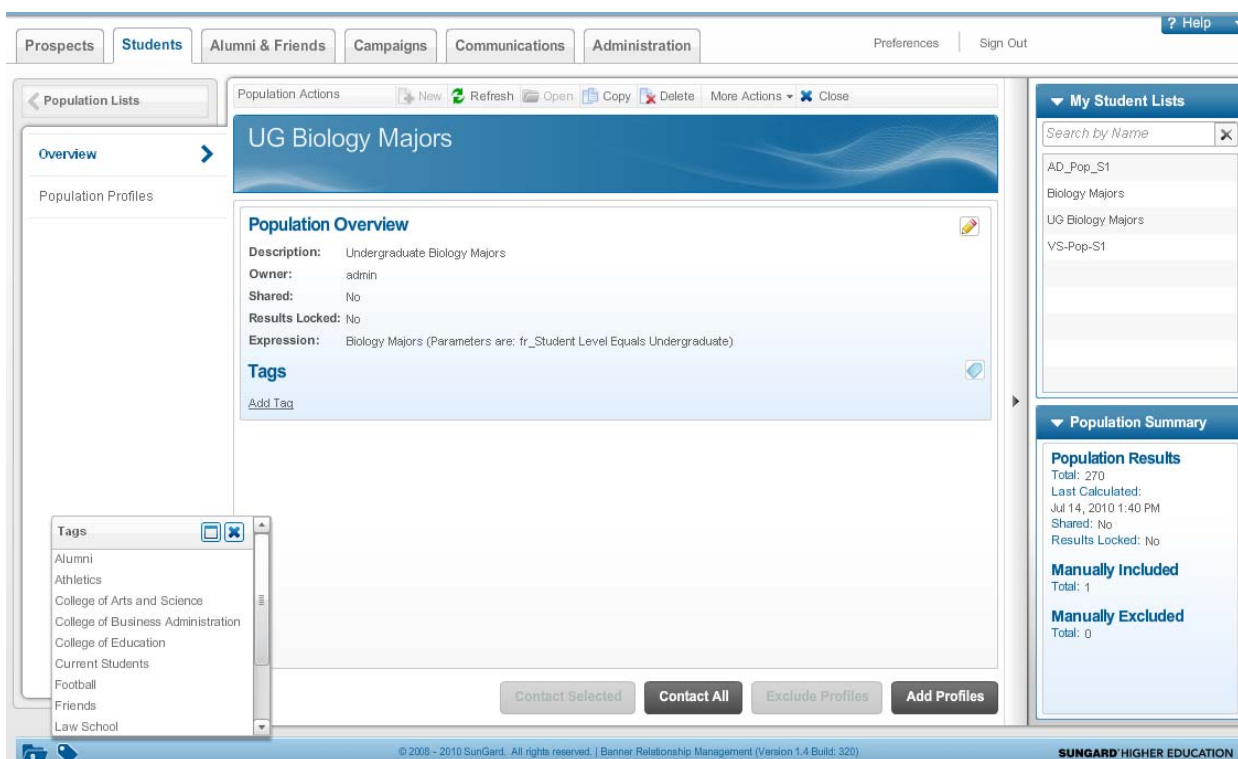
When working with expressions, tags can be incorporated into expression query criteria.

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

Applying a Tag to an Item

Introduction

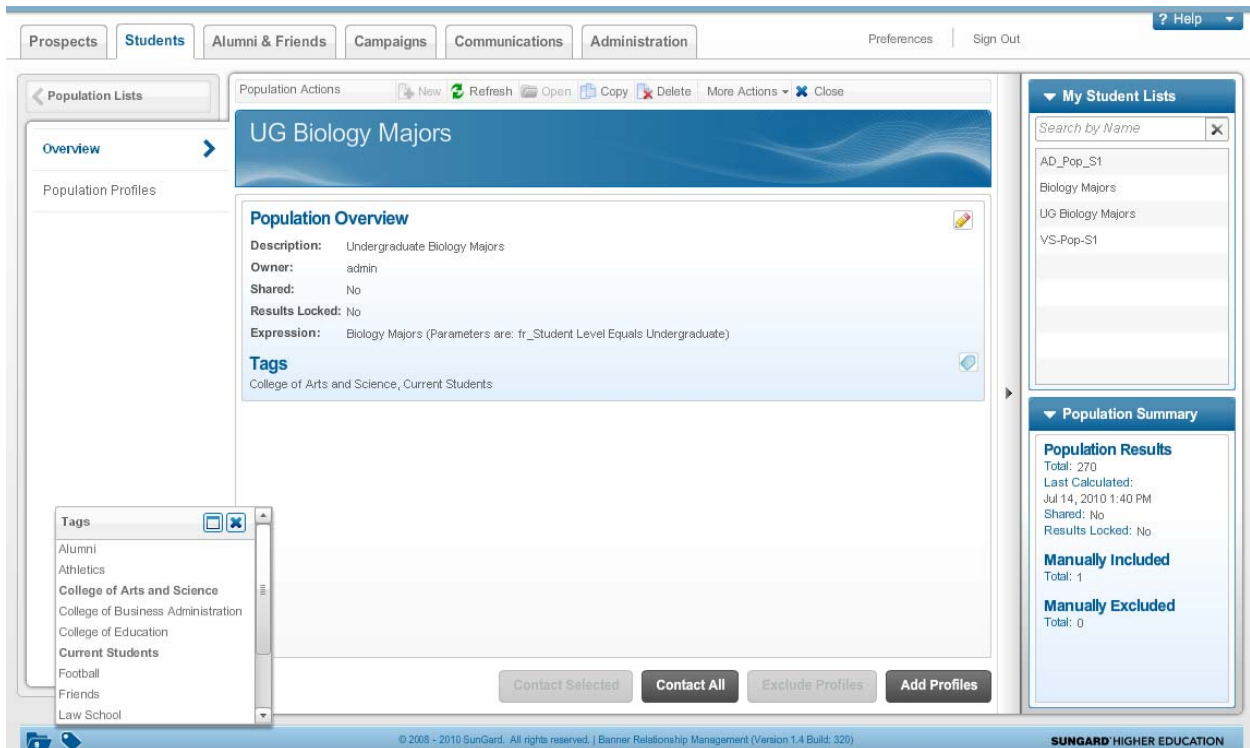
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (🏷️) icon or by clicking the **Add Tags** link on an overview page.



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

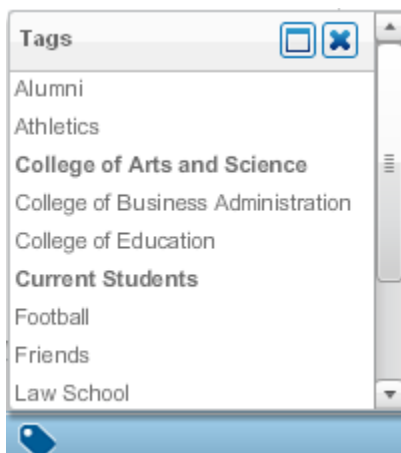
Applying tags from the Tags Display Interface

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 **College of Arts and Science** and **Current Students** in the example below. Multiple tags can be applied to an item.



Unapplying tags

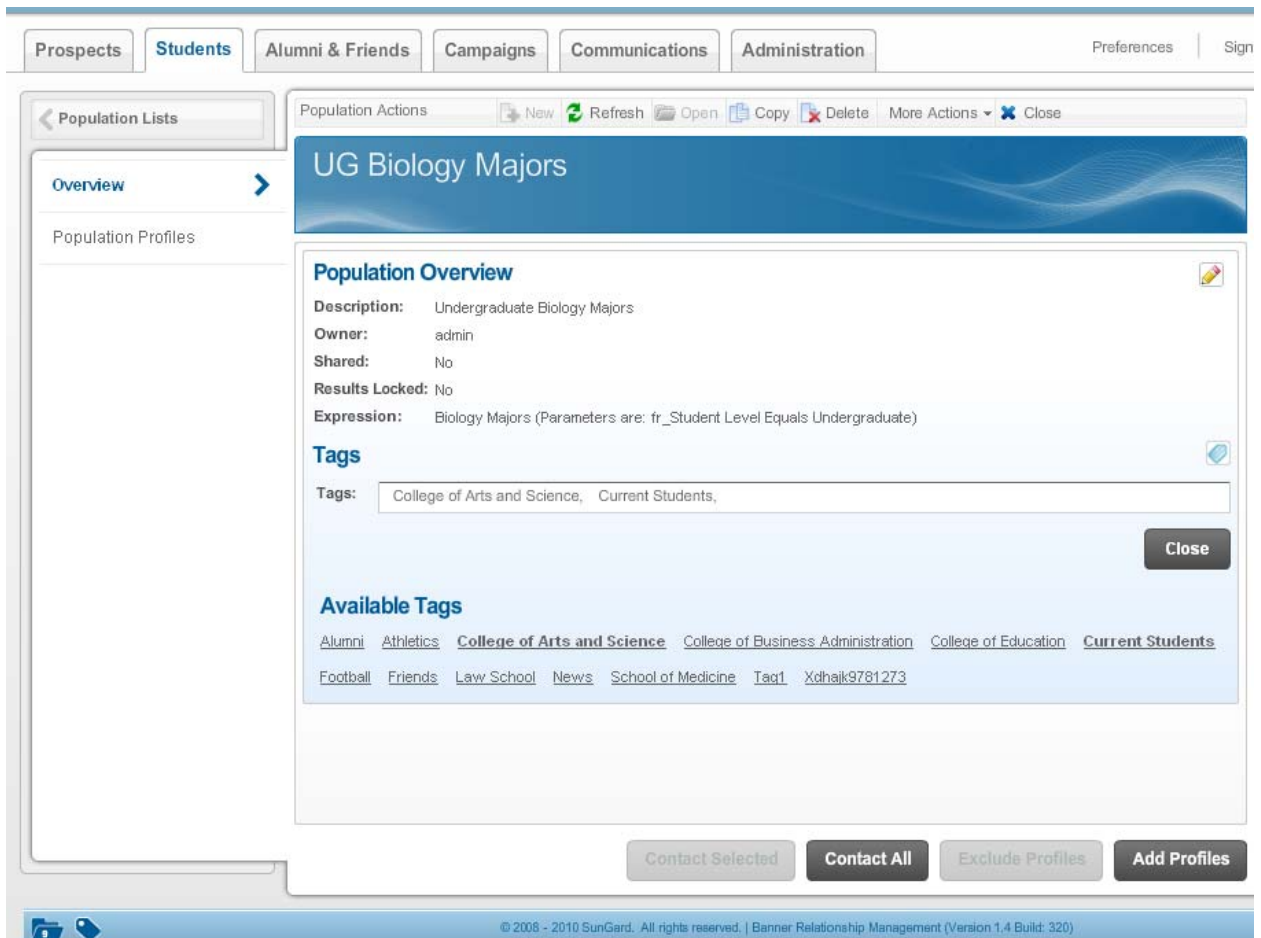
To unapply a tag, click it again. It should change from being bolded to normal case, and it will be removed from the item's summary.



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

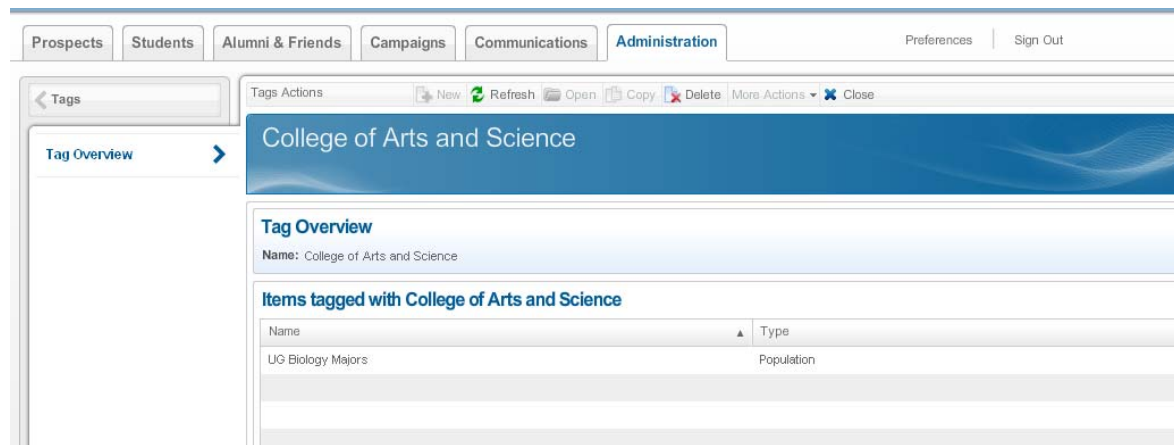
Once a tag has been applied to items in the Relationship Management system, you can use the **Tags** link on the **Administration** tab to view all items to which that tag has been applied.

The screenshot displays the Relationship Management system interface. At the top, there are tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The Administration tab is selected. Below the tabs, there are links for Preferences and Sign Out, and a Help button. The main content area is titled 'Tags' and includes a search bar labeled 'Search by Name' and an 'Advanced Search' button. Below the search bar, a table lists various tags with their associated items. The table has columns for Name, Added By, Added Date, and Count of Associations*. The tags listed are Alumni, Athletics, College of Arts and Science, College of Business Administration, College of Education, Current Students, Football, Friends, Law School, News, and School of Medicine. The 'Tags' link in the left sidebar is highlighted with a blue arrow.

Name	Added By	Added Date	Count of Associations*
Alumni	admin	Jul 14, 2010 1:42 F	0
Athletics	admin	Jul 14, 2010 1:42 F	0
College of Arts and Science	admin	Jul 14, 2010 1:42 F	1
College of Business Administration	admin	Jul 14, 2010 1:42 F	0
College of Education	admin	Jul 14, 2010 1:42 F	0
Current Students	admin	Jul 14, 2010 1:42 F	1
Football	admin	Jul 14, 2010 1:43 F	0
Friends	admin	Jul 14, 2010 1:42 F	0
Law School	admin	Jul 14, 2010 1:41 F	0
News	admin	Jul 14, 2010 1:43 F	0
School of Medicine	admin	Jul 14, 2010 1:41 F	0

Steps

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

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

Select Tags for Search

Available Tags

Search by Name

Advanced Search

Displaying 13 rows.

<input type="checkbox"/>	Name	Added Date	Added By	Tag Count
<input checked="" type="checkbox"/>	College of Ar...	Jul 14, 2010	admin	1
<input type="checkbox"/>	College of E...	Jul 14, 2010	admin	0
<input type="checkbox"/>	Athletics	Jul 14, 2010	admin	0
<input type="checkbox"/>	Football	Jul 14, 2010	admin	0
<input type="checkbox"/>	Tag1	Jul 13, 2010	admin	1
<input type="checkbox"/>	Xdhajk9781...	Jul 13, 2010	admin	1
<input type="checkbox"/>	School of M...	Jul 14, 2010	admin	0
<input type="checkbox"/>	Law School	Jul 14, 2010	admin	0
<input type="checkbox"/>	Current Stu...	Jul 14, 2010	admin	1
<input type="checkbox"/>	Alumni	Jul 14, 2010	admin	0
<input type="checkbox"/>	Friends	Jul 14, 2010	admin	0

Selected Tags

Clear List

Name	Added Date	Added By	Tag Count

Cancel Select

5. Double-click on Available Tags entries to move them to the Selected Tags block, or click on the item to select it, then click the right arrow icon to move the tag to the Selected Tags block.
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**.
8. The items that contain your criteria will be displayed.

Population Lists

Search by Name

Search Descriptions: Tags = College of Arts and Science

Advanced Search

Displaying 1 row.

Name	Description	Status	Access	Owner	Creation Da	List Count	Last Calculated
UG Biology Majors	Undergraduate Biology	Available	Personal	admin	Jul 14, 2010	270	Jul 14, 2010 1:40 PM