

# **Banner Enrollment Management Suite Relationship Management Tags Administration Training Workbook**

*Release 1.4 - August 2010*

*Updated 08/13/2010*



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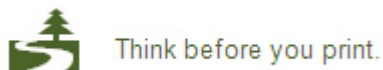
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04/30/2008	New version that supports Recruitment and Admissions Relationships 1.2 software.
10/09/2009	Revised to support Relationship Management 1.3 (new name and features).
08/13/2010	Revised to support Relationship Management 1.4 (updated screenshots, functionality for tags remain the same).

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# Introduction



## Course goal

This course is designed to introduce the administrative uses of tags in Relationship Management.

## Course objectives

At the end of this training workbook you will be able to create and maintain tags.

## Intended audience

Admissions Office, Students Services, and Alumni Office staff who are responsible for creating and maintaining tags.

## Prerequisites

To complete this course, you should have

- completed the Banner Enrollment Management – Relationship Management Overview training workbook
- have the user role permissions to be able to create tags.

# Introduction to Tags

---

## Description

You can create a tag that can be associated with expressions, populations, templates, campaigns, or interactions. A tag is a user-defined description that can be applied to multiple items so that you can find or search for similar items based on the tag applied. Tags are similar in concept to keywords, and allow you to characterize and categorize items and subsequently search for them by 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.

# Tag Permissions

---

## Creation

Only administrators and specified users can create tags in the Relationship Management system. If you do not have the relevant permissions, you will not have access to this functionality.

## Application

Other users may be able to apply and unapply previously created tags to the items in the Relationship Management system. Administrators can grant or remove permission to do so from users as desired.

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.

# The Tags Menu

## Menu

If you have the ability to create tags, you will have a **Tags** link on the **Administration** tab.

Tags Actions: New Refresh Open Copy Delete More Actions Close

Tags

Search by Name

Advanced Search

Displaying 12 rows.

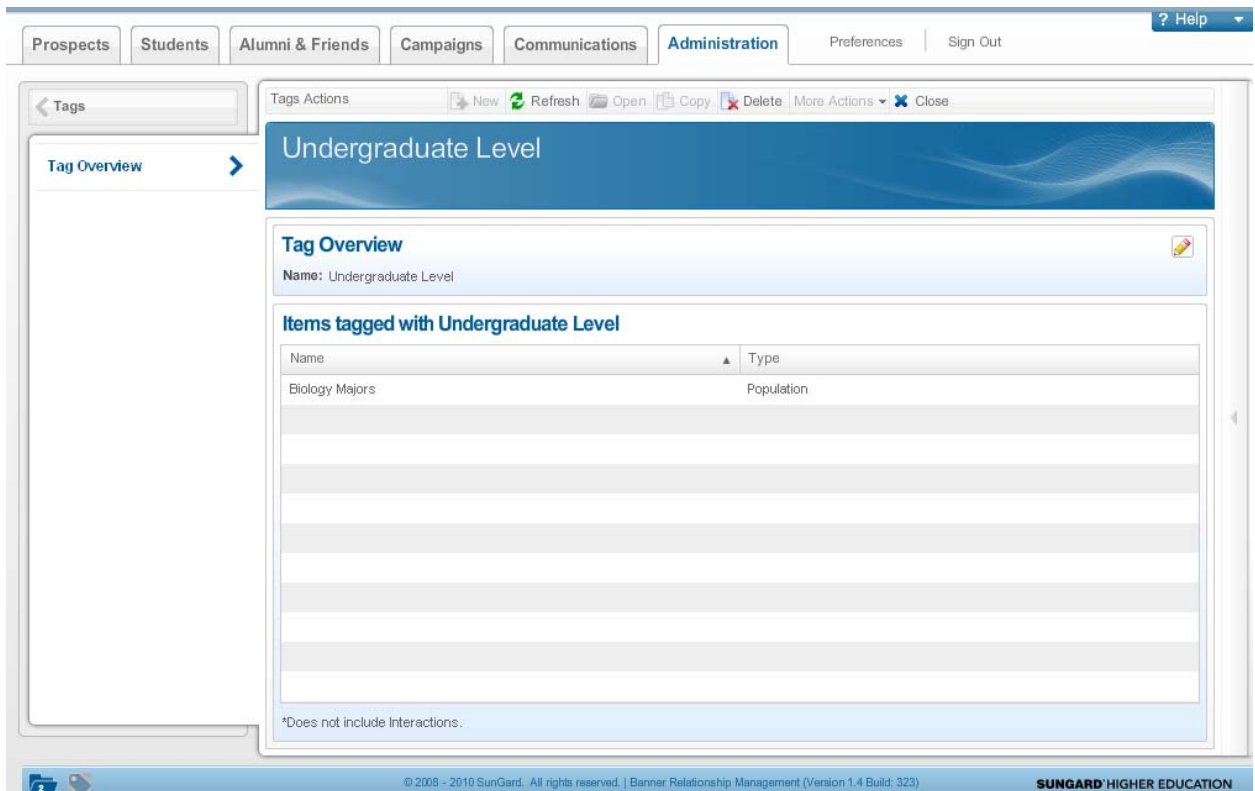
Name	Added By	Added Date	Count of Associ
2009 Prospects	admin	Jul 15, 2010 3:2	0
2010 Prospects	admin	Jul 15, 2010 3:2	1
2011 Prospects	admin	Jul 15, 2010 3:2	0
Admissions	admin	Jul 15, 2010 2:1	0
Alumni	admin	Jul 15, 2010 3:1	0
Athletics	admin	Jul 15, 2010 3:1	0
College of Arts and Science	admin	Jul 15, 2010 3:1	0
College of Business	admin	Jul 15, 2010 3:1	0
College of Law	admin	Jul 15, 2010 3:1	0
College of Medicine	admin	Jul 15, 2010 3:1	0
Graduate Level	admin	Jul 15, 2010 3:2	0
Undergraduate Level	admin	Jul 15, 2010 3:4	1

\*Does not include Interactions.

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From this screen, you can view and edit existing tags and create new ones.

An administrator can select a tag and view all items in Relationship Management that are associated with it. The items are sortable by name or item type.



By using tags intelligently, this enables the administrator to view a wide variety of related items by selecting the tag that they all share.



# The Tags Display Interface

## Introduction

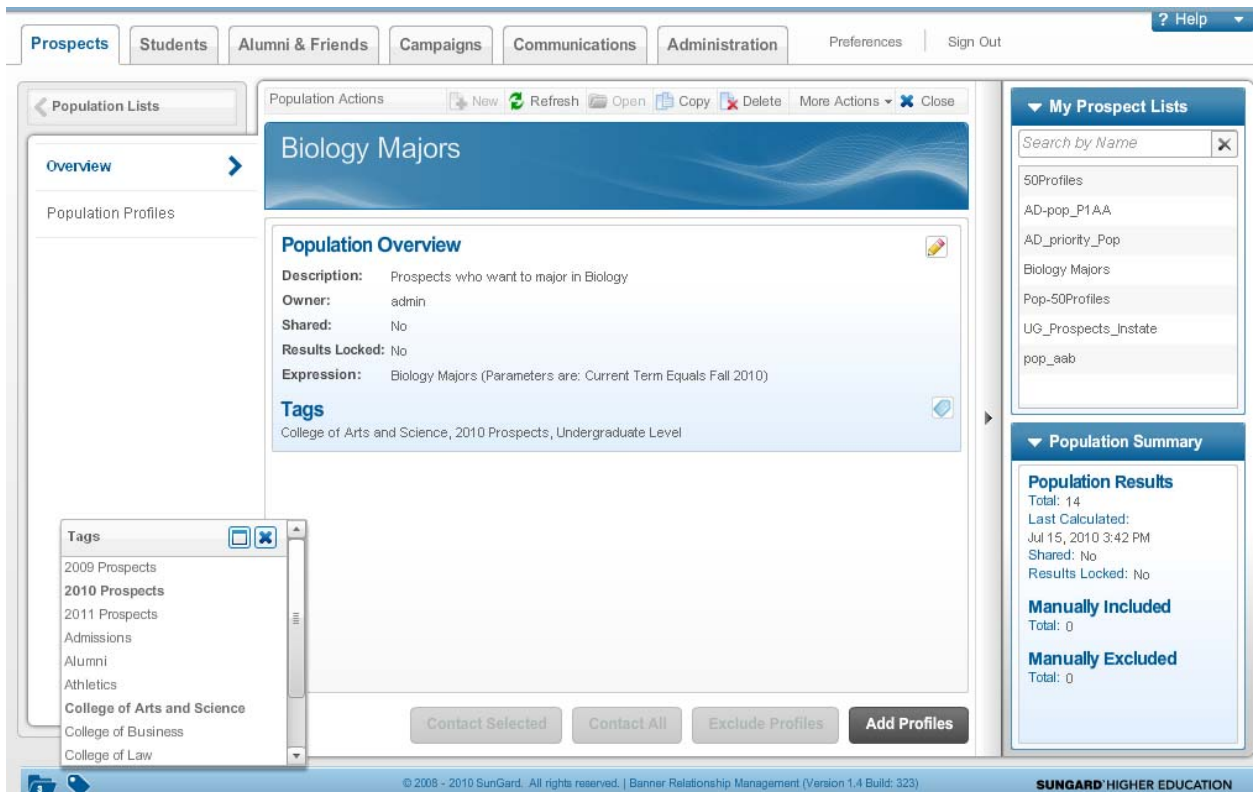
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (🏷️) icon or by clicking the **Add Tags** link on an overview page.



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

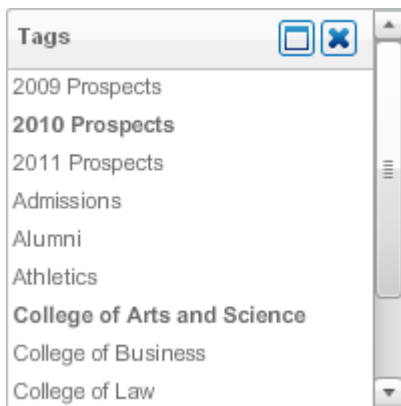
## Applying tags from the Tags Display Interface

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 **2010 Prospects** in the example below. Multiple tags can be applied to an item.



## Unapplying tags

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



## Applying tags using the Add Tags link

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

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

The screenshot displays the Banner Relationship Management (Version 1.4 Build: 323) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration. The main content area shows the 'Population Overview' for 'Biology Majors'. The overview includes a description, owner (admin), shared status (No), results locked status (No), and expression (Biology Majors (Parameters are: Current Term Equals Fall 2010)). Below this is a 'Tags' section with a text input field containing '2010 Prospects, College of Arts and Science, Undergraduate Level' and a 'Close' button. An 'Available Tags' section lists various tags such as '2009 Prospects', '2010 Prospects', '2011 Prospects', 'Admissions', 'Alumni', 'Athletics', 'College of Arts and Science', 'College of Business', 'College of Law', 'College of Medicine', 'Graduate Level', and 'Undergraduate Level'. At the bottom are buttons for 'Contact Selected', 'Contact All', 'Exclude Profiles', and 'Add Profiles'. On the right side, there are two panels: 'My Prospect Lists' with a search bar and a list of profiles, and 'Population Summary' with 'Population Results' (Total: 14, Last Calculated: Jul 15, 2010 3:42 PM, Shared: No, Results Locked: No) and 'Manually Included' (Total: 0) and 'Manually Excluded' (Total: 0) sections.

## 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.

# Using Tags

## Uses

Once tags have been applied to items in the Relationship Management system, they can be used in a variety of ways

## Advanced Searches

Users may use Advanced Search to locate desired items using tags as a search criteria. You can search for items (such as expressions, populations, templates, campaigns) using tags as a condition. Use the **Select Attribute** drop-down list to select **Tags** and then use the **Look Up** icon to select one or more tags as search criteria. The benefit of searching by tags is that once you find the item you can open it.



The screenshot shows a web application window titled "Population Lists". At the top, there is a search bar labeled "Search by Name" with a magnifying glass icon. Below this, there are two main sections. The first section contains a dropdown menu labeled "Tags" and a text input field with a "Look Up" icon (three dots) and a close icon (X). The second section contains a dropdown menu labeled "Select Attribute". At the bottom right of the main content area, there are three buttons: "Close", "Clear", and "Go". Below the main content area, there is a tab labeled "Advanced Search" with a magnifying glass icon.

## Expressions

You can also use tags in expressions. Expressions are used to define the criteria for inclusion or exclusion in a population grouping. Expressions are critical to many activities in Relationship Management. For example, if an institution aims to recruit more female students to science and engineering programs, it may wish to send specific communications to individuals meeting this profile. An Expression would allow the institution to select the prospects who meet the criteria for such communications. In the Expression Builder you can select attributes that use tags such as the **In Campaigns With Tag** attribute shown here.

**Expression Builder**

Select Attribute Filter By Name

Constituent	Campaign Participation	Activity Name
Curricula	Communication Log	Activity State
Populations	Communication Template	Campaign Name
Prospective Student	Desirability Ratings	Campaign State
Relationship Management	Funnel Status	Currently In Campaign
Student	Interactions	Currently Not In Campaign

**Currently Not In Campaign:** Selects constituents who are not currently running in any campaign. [SPRIDEN\_PIDM NOT IN VWORKFLOWWITHCAMPAIGN]

Back Add Values

**▼ Expression Preview**

Where Currently Not In Campaign Is True

Cancel Save

# Working with Tags



## Introduction

This chapter is designed to demonstrate the procedures involved in working with tags.

## Objectives

At the end of this chapter, the participant should be able to:

- create a tag
- apply a tag to an item
- unapply a tag from an item
- view all items to which a specific tag has been applied
- search for items with a specific tag applied
- create an expression that includes tag functionality

# Creating a Tag

## Introduction

An administrator can create tags on the **Tags** link of the **Administration** tab.

Tags Actions: New Refresh Open Copy Delete More Actions Close

Tags

Search by Name

Advanced Search

Displaying 12 rows.


Name	Added By	Added Date	Count of Associ
2009 Prospects	admin	Jul 15, 2010 3:2	0
2010 Prospects	admin	Jul 15, 2010 3:2	1
2011 Prospects	admin	Jul 15, 2010 3:2	0
Admissions	admin	Jul 15, 2010 2:1	0
Alumni	admin	Jul 15, 2010 3:1	0
Athletics	admin	Jul 15, 2010 3:1	0
College of Arts and Science	admin	Jul 15, 2010 3:1	0
College of Business	admin	Jul 15, 2010 3:1	0
College of Law	admin	Jul 15, 2010 3:1	0
College of Medicine	admin	Jul 15, 2010 3:1	0
Graduate Level	admin	Jul 15, 2010 3:2	0
Undergraduate Level	admin	Jul 15, 2010 3:4	1

\*Does not include Interactions.

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## Steps

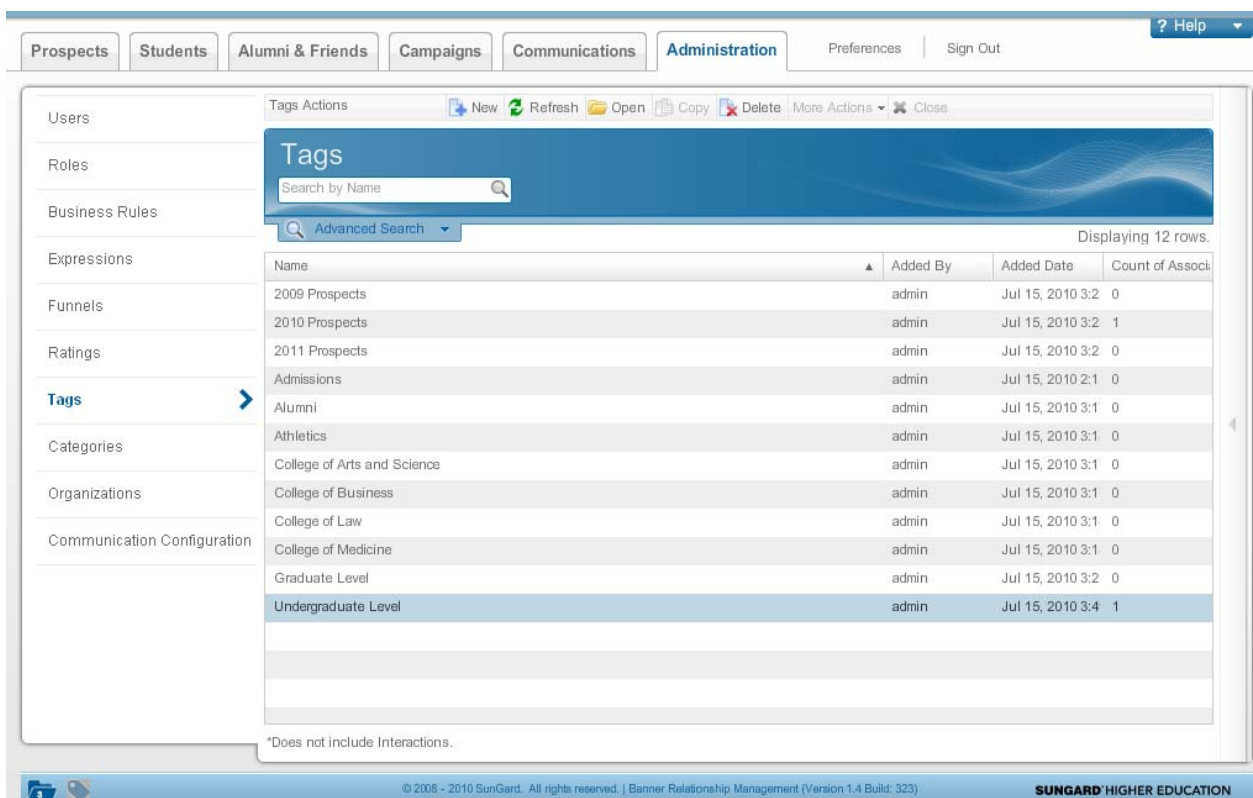
1. From the **Tags** link, click **New** on the Tags Actions toolbar.



The 'Add Tag' dialog box is shown. It has a title bar with 'Add Tag' and window control buttons. Below the title bar is a text input field labeled 'Name: \*'. At the bottom right are two buttons: 'Cancel' and 'Save'.

2. Enter a name for your new tag in the **Name** field.
3. Click **Save** to save your new tag, or **Cancel** to exit without saving.

Your new tag should appear in the list of available tags.




The screenshot shows the Banner Relationship Management (Version 1.4) interface. The top navigation bar includes tabs for Prospects, Students, Alumni & Friends, Campaigns, Communications, and Administration (selected). Below the navigation bar is a sidebar with a list of modules: Users, Roles, Business Rules, Expressions, Funnels, Ratings, Tags (selected), Categories, Organizations, and Communication Configuration. The main content area displays the 'Tags' management screen. It features a 'Tags Actions' toolbar with buttons for New, Refresh, Open, Copy, Delete, and More Actions. Below the toolbar is a search bar labeled 'Search by Name' and an 'Advanced Search' dropdown. A table lists the existing tags, showing columns for Name, Added By, Added Date, and Count of Associations. The table displays 12 rows of data, with the 'Undergraduate Level' tag highlighted. A footer note states '\*Does not include Interactions.' The bottom status bar shows the copyright information: '© 2008 - 2010 SunGard. All rights reserved. | Banner Relationship Management (Version 1.4 Build: 323)' and the SunGard Higher Education logo.

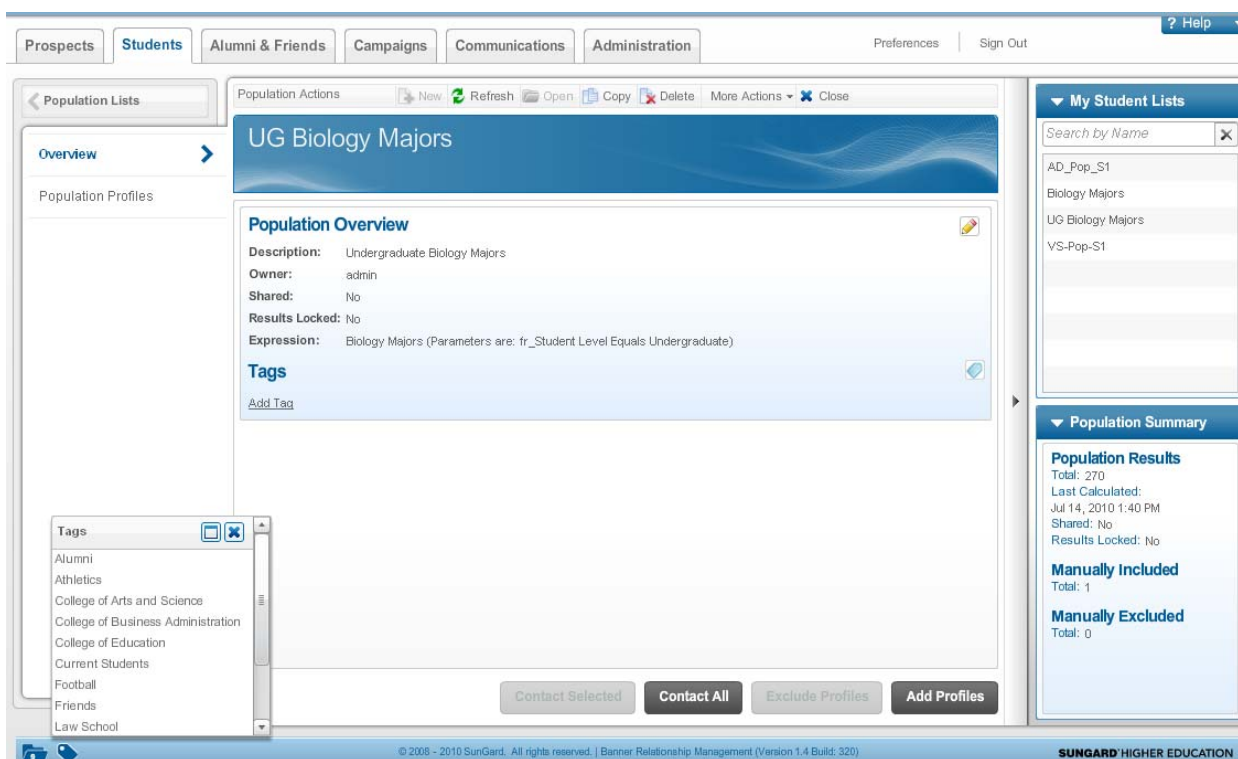
Name	Added By	Added Date	Count of Associ
2009 Prospects	admin	Jul 15, 2010 3:2	0
2010 Prospects	admin	Jul 15, 2010 3:2	1
2011 Prospects	admin	Jul 15, 2010 3:2	0
Admissions	admin	Jul 15, 2010 2:1	0
Alumni	admin	Jul 15, 2010 3:1	0
Athletics	admin	Jul 15, 2010 3:1	0
College of Arts and Science	admin	Jul 15, 2010 3:1	0
College of Business	admin	Jul 15, 2010 3:1	0
College of Law	admin	Jul 15, 2010 3:1	0
College of Medicine	admin	Jul 15, 2010 3:1	0
Graduate Level	admin	Jul 15, 2010 3:2	0
Undergraduate Level	admin	Jul 15, 2010 3:4	1




# Applying a Tag to an Item

## Introduction

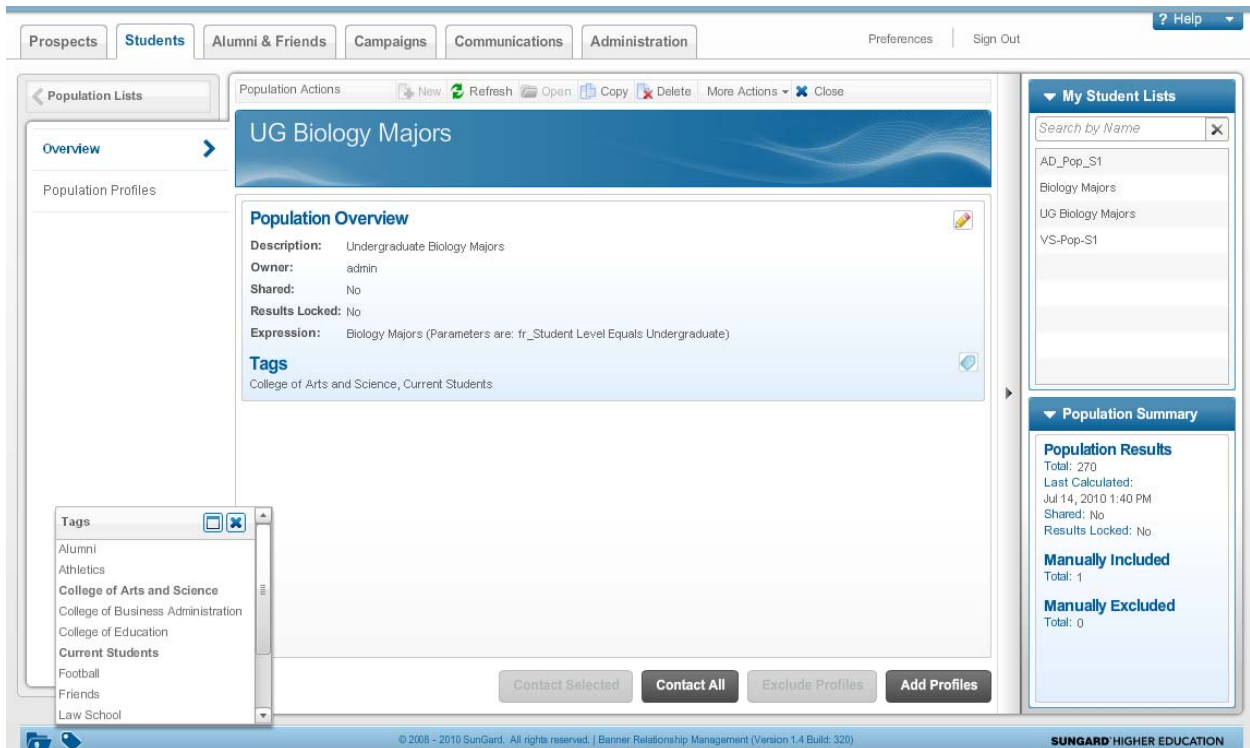
The Tags Display interface is accessed on the pages for each item that can have tags assigned to it. Users who are authorized to add or remove tags can do so by clicking the Tag Display (  ) icon or by clicking the **Add Tags** link on an overview page.



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

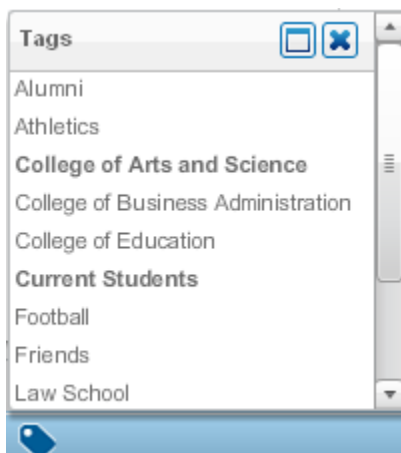
## Applying tags from the Tags Display Interface

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.

Prospects Students Alumni & Friends Campaigns Communications Administration Preferences Sign

Population Actions New Refresh Open Copy Delete More Actions Close

Population Lists Overview Population Profiles

UG Biology Majors

**Population Overview**

Description: Undergraduate Biology Majors  
Owner: admin  
Shared: No  
Results Locked: No  
Expression: Biology Majors (Parameters are: fr\_Student Level Equals Undergraduate)

**Tags**

Tags: College of Arts and Science, Current Students, Close

**Available Tags**

[Alumni](#) [Athletics](#) **[College of Arts and Science](#)** [College of Business Administration](#) [College of Education](#) [Current Students](#)  
[Football](#) [Friends](#) [Law School](#) [News](#) [School of Medicine](#) [Tag1](#) [Xdhaik9781273](#)

Contact Selected Contact All Exclude Profiles Add Profiles

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## 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

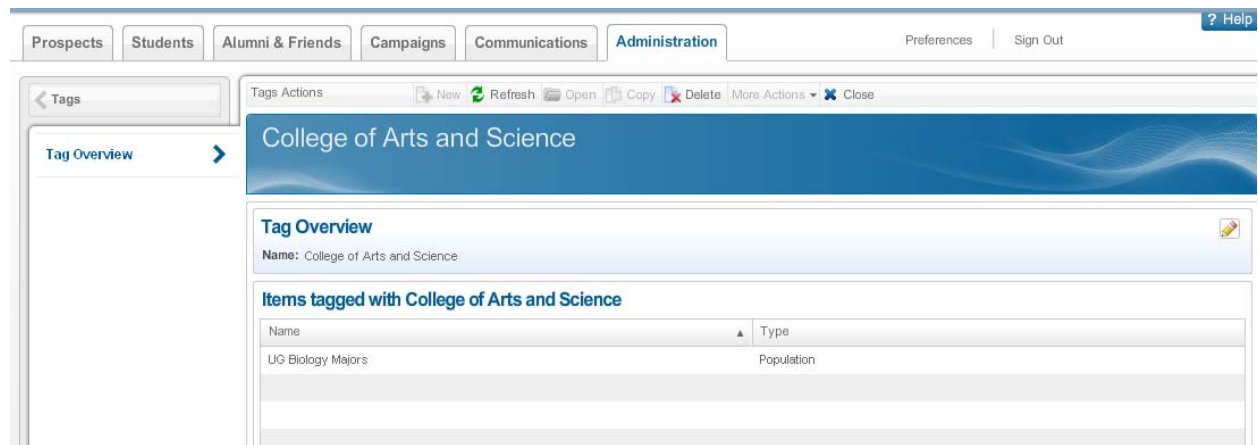
Once a tag has been applied to items in the Relationship Management system, you can use the **Tags** link on the **Administration** tab to view all items to which that tag has been applied.


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 and 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 'Count of Associations\*' column shows the number of items associated with each tag.

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. 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.

Population Lists

Search by Name

Tags

Description

Name

Owner

Shared Access

Tags

Close Clear Go

Advanced Search

Displaying 4 rows.

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**.

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 Date	List Count	Last Calculated
UG Biology Majors	Undergraduate Biology	Available	Personal	admin	Jul 14, 2010	270	Jul 14, 2010 1:40 PM

# Creating An Expression That Uses Tags

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## Introduction

Once tags have been created and applied in the Relationship Management system, administrators can create expressions that use tags as part of their conditions.

Expressions are used to define the criteria for inclusion or exclusion in a population grouping. Expressions are critical to many activities in Relationship Management. For example, if you created multiple communication campaigns and applied the undergraduate level tag to them, you could create an expression that would return all profiles in all the campaigns that had the same tag. An Expression would allow the institution to select the profiles (prospects, students, or alumni and friends) who meet the criteria for such communications.

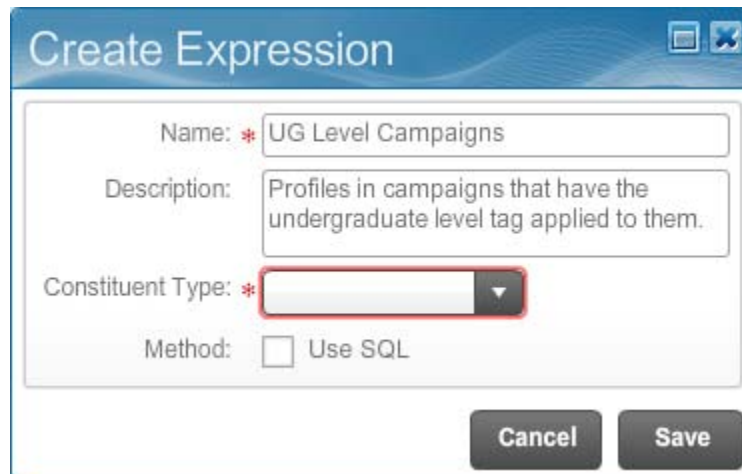
The first step to creating an expression is to create the basic expression which includes just the name, description and option you want to use to create the expression. Creating an expression is the same for Prospects, Students, and Alumni & Friends. All are created on the **Administration** tab using the same steps. However, you do need to identify the constituent type before you can save the expression. There are three profile tabs in Banner Relationship Management: **Prospects**, **Students**, and **Alumni & Friends**. These tabs correspond to the constituent type. Based on your role, you may not see all three.

It is important to note that a person must have a Student record in the Banner database to show up on the **Students** tab in the population lists and in expressions as a student. If a person (for example, an employee) is present in Banner, but does not have a Student record, that person will not show up. Similarly, a person who is not a student and has a Recruit or Applicant record will only appear on the **Prospects** tab and in expressions pre-filtered for Prospects. When you create an expression, you must select one of these three constituent types: **Prospects**, **Students**, or **Alumni & Friends**.



## Steps

1. Create or open an expression as normal. For more information on expressions, refer to the **Expressions** training workbook. The **Name** and **Constituent Type** fields are required.

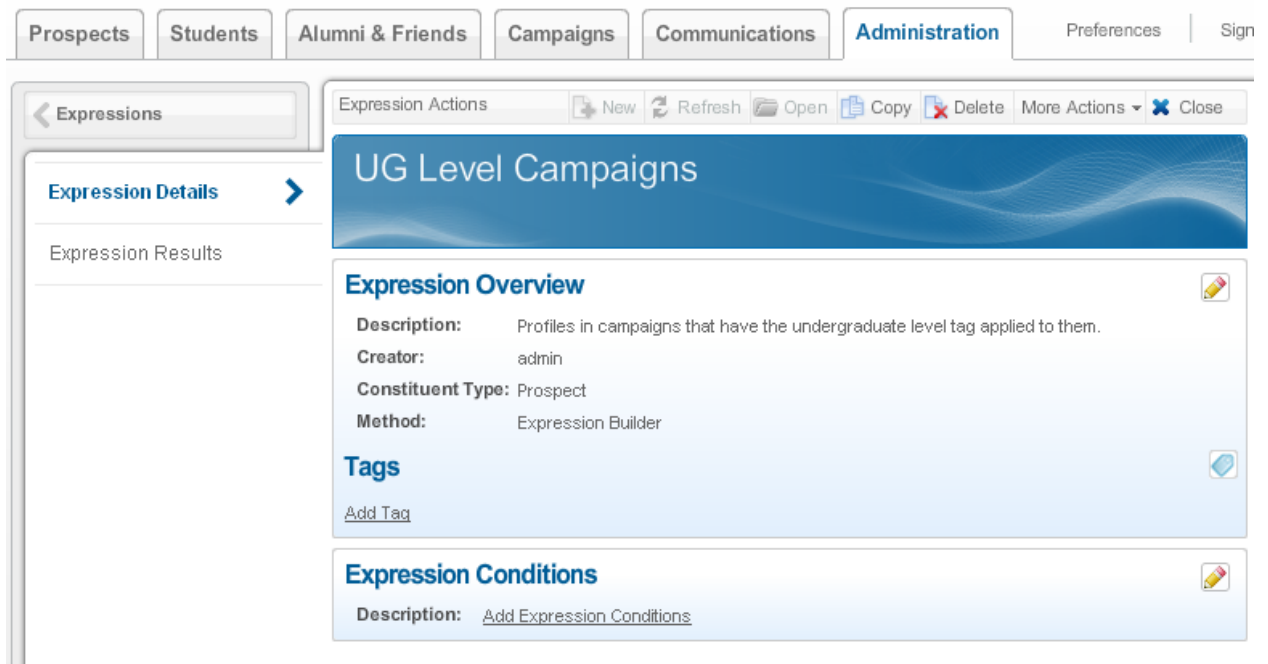


The 'Create Expression' dialog box is shown. It has a title bar with standard window controls. The form contains the following fields:

- Name:** \* UG Level Campaigns
- Description:** Profiles in campaigns that have the undergraduate level tag applied to them.
- Constituent Type:** \* [Dropdown menu with a red border]
- Method:** ☐ Use SQL

At the bottom right are 'Cancel' and 'Save' buttons.

2. Click **Add Expression Conditions** to add conditions to this expression.



The screenshot shows the CRM interface with the 'Administration' tab selected. The left sidebar has 'Expressions' selected, showing 'Expression Details' and 'Expression Results'. The main content area displays the details for the 'UG Level Campaigns' expression.

**Expression Actions:** New, Refresh, Open, Copy, Delete, More Actions, Close

**UG Level Campaigns**

**Expression Overview**

- Description:** Profiles in campaigns that have the undergraduate level tag applied to them.
- Creator:** admin
- Constituent Type:** Prospect
- Method:** Expression Builder

**Tags**

[Add Tag](#)

**Expression Conditions**

**Description:** [Add Expression Conditions](#)

3. Click **Add Conditions** to begin your expression.



4. Select attributes that are related to tags for your expression. Examples follow:



5. Click the **Add Values** button.

6. Use the **Look Up** icon to select the tag(s) you want to use.

The screenshot shows the 'Expression Builder' window with the 'Select Values' tab active. The dialog box has a title bar 'Expression Builder' and a subtitle 'Select Values'. Below the subtitle, there is a text field 'In Campaigns With Tag:' followed by a description 'Selects constituents in campaigns with the tag(s) specified. [NAME]'. Below this, there is a 'Values:' section with a dropdown menu set to 'Equals' and a checkbox 'Prompt user for values during Expression execution'. Below the dropdown, there is a text field containing 'Undergraduate Level' followed by a '...' button, an 'or' text, and a 'Select to add another' button. At the bottom right, there are three buttons: 'Back to Attributes', 'Add Another Condition', and 'Complete'.

7. Click the **Complete** button.
8. Click the **Save** button.
9. Click the **Calculate** button.
10. Click the **Review** button to see a list of profiles that match your criteria.