

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

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Revision History Log

Publication Date	Summary
April 1, 2008	New version that supports Enrollment Management Recruiting and Admissions Relationships software.
September 17, 2008	Updated version
October 9, 2009	Revised to support Relationship Management 1.3 (new name and features).
08/13/2010	Revised to support Relationship Management 1.4 (updated screenshots).
12/01/2010	Added note not to include a comment in a business rule.

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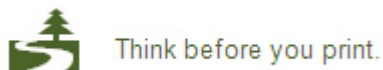


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Complex Campaigns



Introduction

This workbook covers more complex campaign design and management, and builds on the basic campaign information covered in Campaign Management Training Workbook Level I.

Prerequisite: Campaign Management Training Workbook Level I

Objectives

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

- explain parameters
- define a campaign model
- define properties for rule activities
- create guard conditions
- monitor alerts
- respond to alerts

Introduction

The Relationship Management Challenge

Institutional success requires that recruiters

- understand prospect needs, preferences, and behaviors
- deliver highly personalized experiences and interactions that build relationships
- monitor and adjust efforts to make improvements to campaign effectiveness.

Recruiters need a solution that

- provides visibility to prospect history
- enables relevant dialogue over time and across targeted prospect groups
- provides up-to-date information about campaign and communication efforts.

Campaigns provide powerful support including

- designing recruiting campaigns based on specific departmental or institutional objectives
- creating new campaigns easily and modifying existing templates to meet changing requirements
- associating pre-defined populations lists (target audience) to each campaign
- managing tasks, alerts, and notifications associated with each campaign
- monitoring progress towards completion of campaign activities and tracking results, intervening at any point to make adjustments to individual instances of each campaign.

Campaigns Management Workbook Level I demonstrated how to design a basic campaign. This Workbook takes those learned steps further to show how to create a more complex campaign when needed.

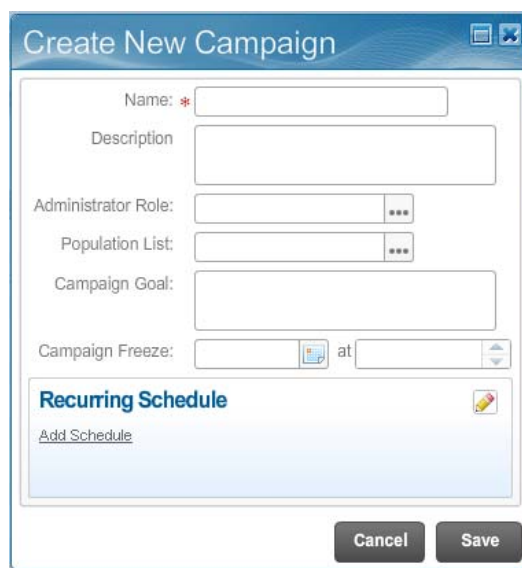
Campaigns Workspace

The steps involved for designing, starting and managing a campaign are the same for basic and complex campaigns.

Every campaign must contain a **Campaign Overview**, **Campaign Model** and **Population List** in order to execute.

The steps to build and execute a campaign include:

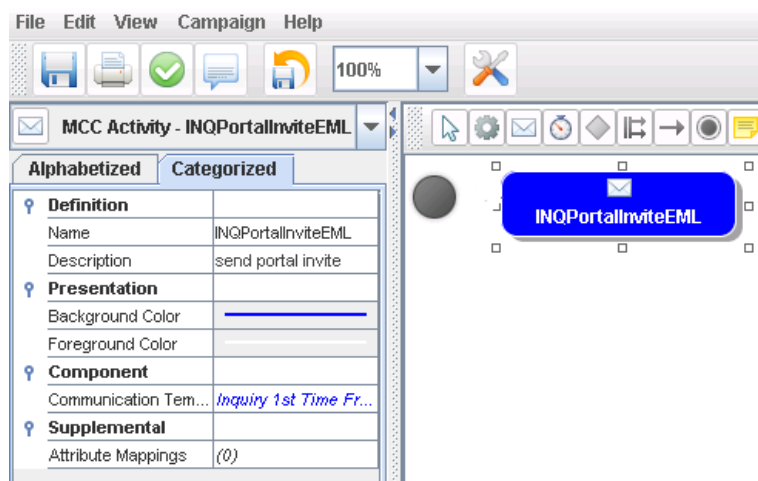
1. Create a campaign definition



The 'Create New Campaign' dialog box contains the following fields and controls:

- Name:** A text input field with a red asterisk indicating it is required.
- Description:** A larger text input field.
- Administrator Role:** A dropdown menu with three dots indicating more options.
- Population List:** A dropdown menu with three dots indicating more options.
- Campaign Goal:** A text input field.
- Campaign Freeze:** A date/time picker with a calendar icon and a time dropdown.
- Recurring Schedule:** A section with a blue header and an 'Add Schedule' link.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

2. Build model and define activities



The Campaign Management interface shows the following components:

- Menu Bar:** File, Edit, View, Campaign, Help.
- Toolbar:** Icons for file operations, a zoom slider set to 100%, and a settings icon.
- Left Panel:** A tree view showing the campaign structure for 'MCC Activity - INQPortallInviteEML'. It includes sections for Definition, Presentation, Component, and Supplemental.
- Right Panel:** A canvas showing a blue button labeled 'INQPortallInviteEML' with a mail icon.

Alphabetized	
Definition	
Name	INQPortallInviteEML
Description	send portal invite
Presentation	
Background Color	
Foreground Color	
Component	
Communication Tem...	Inquiry 1st Time Fr...
Supplemental	
Attribute Mappings	(0)

3. Validate the campaign model



4. Select a Population List

Population Lookup

Search by Name

Advanced Search

Displaying 6 rows.

Population List	Description	Owner	Locked	Count	Constituent Typ
Students living ir		admin	No	398	Student
UG App Missing	UG App Missing	admin	No	50	Prospect
Inq 1st Time Fre	Inquiry - 1st Tim	admin	No	9018	Prospect
Prospects Living		admin	No	460	Prospect
y pop list		admin	No	5	Prospect
pop list2		admin	No	0	Prospect

5. Activate a campaign

6. Start the campaign

Start Campaign

☒ Launch Now ☐ Schedule Date and Time

Time Zone:

Start Date:

Time:

7. Monitor the campaign

Campaigns

Search by Name

Advanced Search

Displaying 5 rows.

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

Campaign Alerts

Select [Open](#) to view details. Select [New](#) to create a campaign.

Campaign Details

[Summary](#) [Effectiveness](#)

List:
UG App Missing Checklist Item
(Prospect)
Initial List Count: 50
Status: Active
Start Date: Aug 12, 2010 11:32 AM
☐ Recalculate List On Launch

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Adding Complexity

A campaign can be very basic, or can be designed to reflect the complexity of more intricate business processes. This is accomplished by including additional functionality provided by the inclusion of business rules and properties to the campaign design.

Campaign Modeler Canvas

The following functions can be included in the campaign to expand the capabilities of the campaign:



Rule Activity - Place a Rule Activity in the drawing area. A Rule Activity allows for selection of a rule via a URI component and uses the returned value to determine process direction (based on Guard Conditions).



Transition Guard Conditions – Add a Guard Condition to a transaction. A Guard Condition is a business rule that is evaluated when the campaign is started to make an activity decision. Transition Guard Conditions must evaluate to true or false.



Multiple paths in a campaign – Create multiple paths in a campaign using transitions with or without Guard Conditions.



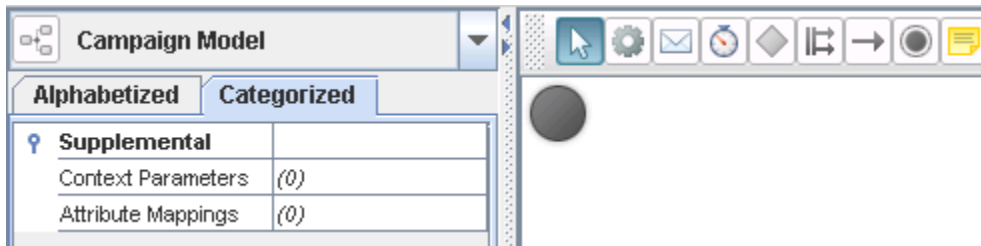
Parallel activity - Parallel paths can be used in situations where it doesn't matter which activity or which string of activities is performed first, as long as they are all performed before another activity or before the end of the campaign.

Property Sheets

Adding complexity to the Modeler Canvas requires additional information to be included in the Property Sheets as well.

Campaign Model Property Sheet

The campaign property sheet allows you to set specific information about the campaign as a whole.



The Campaign Modeler Property Sheet contains the following fields:

- **Context Parameters** - Campaign Context Parameters apply throughout the whole campaign. The parameters establish the data that will be used throughout all activities in the campaign and may be shared between different steps in the campaign. Each Context Parameter is mapped to at least one Component Parameter which represents an activity in the campaign.
- **Attribute Mappings** - Campaign Attribute Mappings are used to map data that applies to the entire campaign (for example Target ID, as a Target ID must exist for each prospect in the campaign). This Attribute is mapped to a Context Parameter (for example, PIDM) that will be used throughout the campaign.

Rule Activity

The property sheet for a Rule Activity is very similar to the MCC and Timer Activities such as:

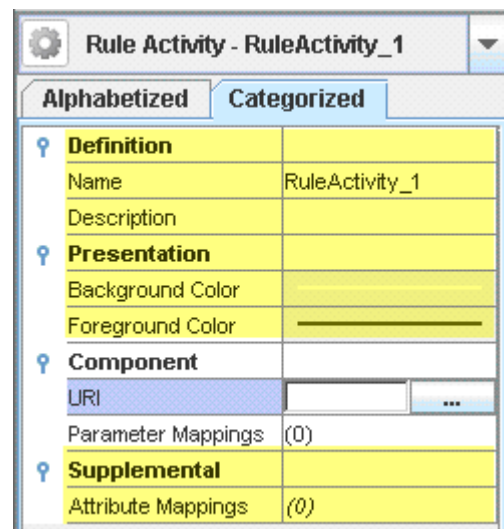
- **Name** – The activity name is required and can be edited. The name cannot include spaces.
- **Description** - The description is optional and can be edited. The description can include spaces.
- **Background and Foreground Colors** – Colors are not required for activities but can be added/edited if desired.

A Rule Activity also includes the following components:

- **URI** - Universal Resource Identifiers (URI) are unique names used to identify a rule set. Each rule set can include one or more rules, and rules are used to carry out the various business tasks that need to be performed.

A URI is created in the Administrative workspace of Relationship Management under the Business Rules menu (Administration tab).

- **Parameter Mappings** - The Parameter Mappings field is used to associate Context and Component parameters by mapping them. When you map a parameter, you define which parameters will be used in this rule activity and how they will be used.
- **Attribute Mappings** - Campaign Attribute mappings are used to map campaign specific data to a Context Parameter that will be used throughout the campaign (for example, the PIDM).



Rule Activity - RuleActivity_1	
Alphabetized	Categorized
Definition	
Name	RuleActivity_1
Description	
Presentation	
Background Color	
Foreground Color	
Component	
URI	
Parameter Mappings	(0)
Supplemental	
Attribute Mappings	(0)

Transitions – Guard Conditions

The **Transition** property sheet is where the business rule is added to the **Guard Condition** field to make a process level decision within the campaign, for example, 'Yes' or 'No'. You can also get to the Transition Property Sheet by right-clicking on the actual transition line in the campaign model.

The screenshot shows the 'Transition' property sheet for a transition named 'Start - Start -> Rule Activity - Rul...'. It has two tabs: 'Alphabetized' and 'Categorized'. The 'Categorized' tab is active, showing a table with two sections: 'Presentation' and 'Supplemental'. The 'Presentation' section has a single row with the label 'Presentation' and an empty text field. The 'Supplemental' section has a row with the label 'Guard Condition', a yellow text field, and a button with three dots.

Start - Start -> Rule Activity - Rul...	
Alphabetized Categorized	
Presentation	
Presentation	
Supplemental	
Guard Condition	...

Parallel Paths

The **Parallel** Property Sheet includes the following fields:

- **Name** – The activity name is required and can be edited. The name cannot include spaces.
- **Description** - The description is optional and can be edited. The description can include spaces.
- **Foreground Colors** – Colors are not required for activities but can be added/edited if desired.

The screenshot shows the 'Parallel' property sheet for an activity named 'Parallel - Synchronizer_3'. It has two tabs: 'Alphabetized' and 'Categorized'. The 'Categorized' tab is active, showing a table with two sections: 'Definition' and 'Presentation'. The 'Definition' section has two rows: 'Name' with the value 'Synchronizer_3' and 'Description' with an empty text field. The 'Presentation' section has a single row with the label 'Foreground Color' and an empty text field.

Parallel - Synchronizer_3	
Alphabetized Categorized	
Definition	
Name	Synchronizer_3
Description	
Presentation	
Foreground Color	

Tip: If multiple campaign objects are selected, the Campaign Property Sheet will display the individual properties that the selected objects have in common. This feature allows a user to quickly update the properties of multiple objects. For example, you can highlight all MCC activities and change the background color of all of them at the same time, so they are easily identified in your model.

Putting It All Together

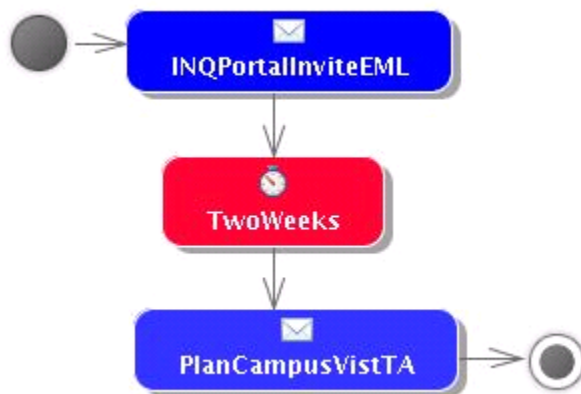


Putting It All Together

Scenario





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




The scenario that will be used builds upon the concepts learned in Level I Workbook, which demonstrated how to create a campaign model that includes the following steps:



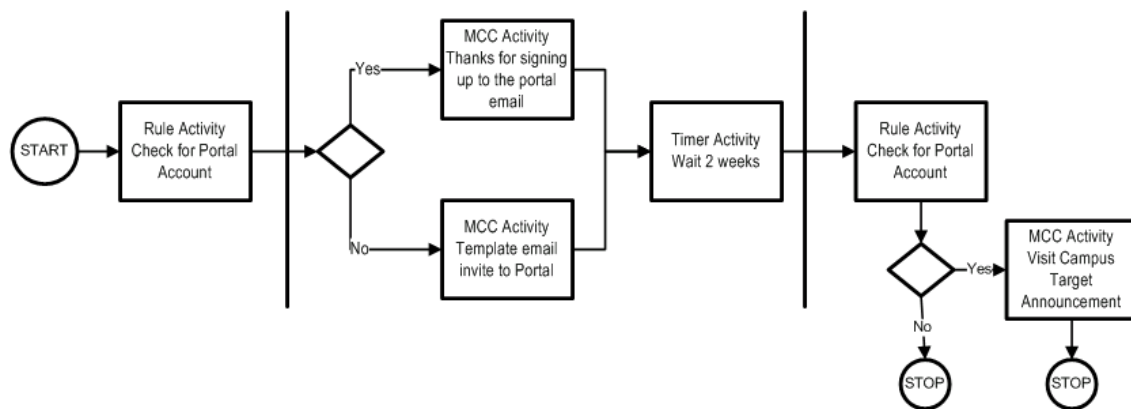
Building on that example, a complex campaign can add more personalization to the campaign by only sending an email invitation to those who do not have an account, and sending a 'thank you' email to those who have signed into the portal. These actions can happen simultaneously and independently of each other.

To create a campaign where the targeted announcement should also only be generated for valid accounts, the following objects will need to be included in the campaign model:

1.  Rule Activity to check if prospect already has a portal account.
2.  MCC Activity for the template **INQ Portal Invite EML** for those who do not have an account.
3.  MCC Activity for the template **INQ Thanks EML** for those who have an account.
4.  MCC Activity for **INQ Plan Campus Visit TA** generated to the prospects who have created a portal account.

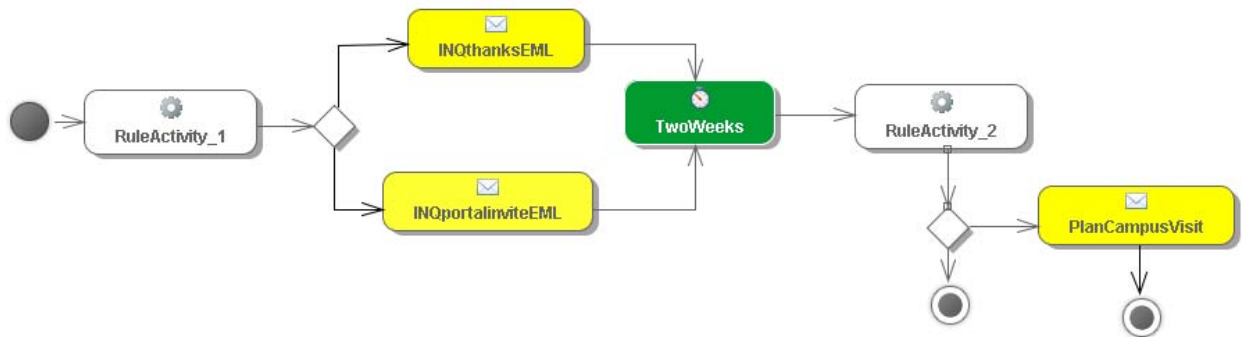
5.  Timer Activity for a two week waiting period between activities.
6.  Guard Transitions for the 'yes' or 'no' decisions.
7.  Parallel Activity for sending the two MCCs.
8. Context Parameters for the prospect's ID (PIDM) and the Prospective Student Portal Account.
9. Mapping Attributes for the Context Parameter.
10. Mapping Component Parameters for each of the rule activities.

The final campaign model will look something like this:



First we can position each of our objects on the campaign modeler and create the property sheets for the MCC and Timer activities following the instructions in the Campaign Workbook Level I.

After we have completed those tasks, our model will look something like this:





The next sections will demonstrate how to create the rest of the steps for a complex campaign.

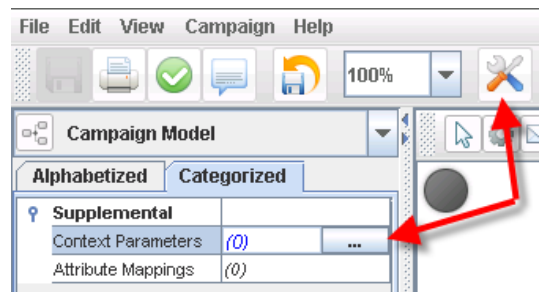
Context Parameters

Context Parameters

The first step in the campaign modeler will be to develop the parameters for the entire campaign. A parameter is a set of measurable factors, such as person's ID and existence of a portal account, that define a campaign and determine its behavior.

In this example, the campaign must check if a person has a prospective student portal account. Therefore two items are needed by the campaign activities: person's ID (PIDM) and existence of a PSP Account. These two items represent the input and output parameters of the whole campaign.


1. Click either the  icon or, with your cursor in the drawing area, by selecting the Context Parameters search Icon  in the Property Sheet.

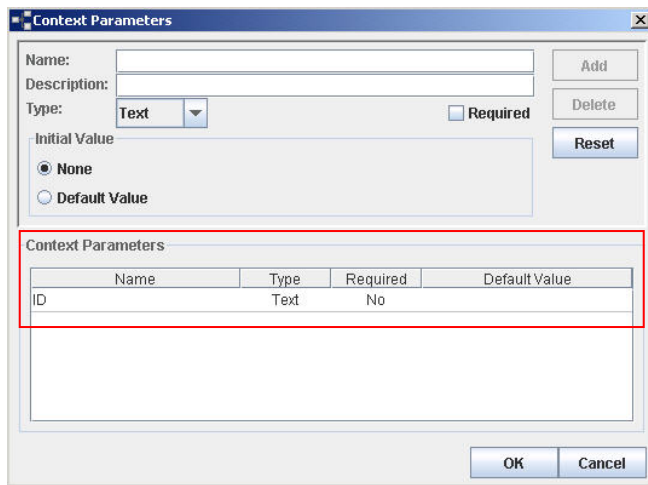


2. The Context Parameters window opens.
 - a. Enter a name for the parameter. In this example it is **ID**.
 - b. Enter a description (not required).
 - c. Select the data type required by the parameter (defaults to **Text**).
 - d. Select the Required checkbox only if this Context Parameter is required.
Note: Context Parameter values can be required or optional. If required, an initial value must be provided for the parameter when the campaign is started. In the majority of campaigns, the Required checkbox should be left **unchecked**.
 - e. Select an initial value setting for this context parameter if it is Required. The default is **None**.

The screenshot shows the 'Context Parameters' dialog box. The 'Name' field contains 'ID'. The 'Type' is set to 'Text'. The 'Required' checkbox is unchecked. The 'Initial Value' section has 'None' selected. The 'Context Parameters' table at the bottom is empty.

Name	Type	Required	Default Value
------	------	----------	---------------

3. Click the Add button . This creates a Context Parameter with the specified value that is listed in the Context Parameters window.



The dialog box titled "Context Parameters" contains the following fields and controls:

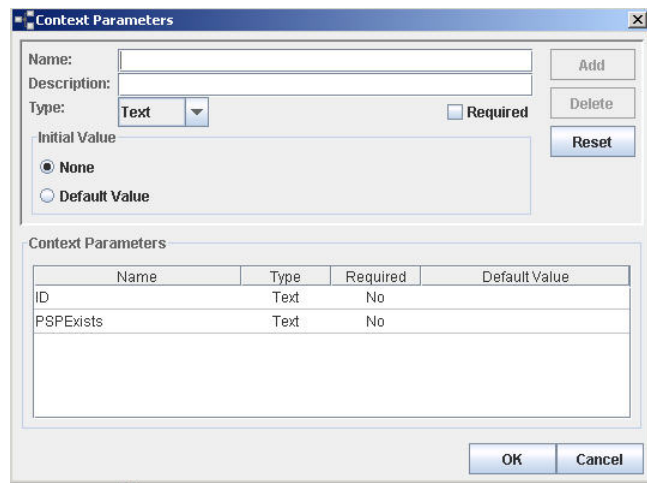
- Name:
- Description:
- Type: (dropdown menu)
- ☐ Required
- Initial Value: ☐ None (selected), ☐ Default Value
- Buttons: Add, Delete, Reset

Below these fields is a table titled "Context Parameters" with the following data:

Name	Type	Required	Default Value
ID	Text	No	

At the bottom of the dialog are OK and Cancel buttons.

4. Create the parameter for the PSP Account required in this example. (Note, for other campaigns, you can continue to create as many parameters as needed).
5. Click **OK**.



The dialog box titled "Context Parameters" contains the following fields and controls:

- Name:
- Description:
- Type: (dropdown menu)
- ☐ Required
- Initial Value: ☐ None (selected), ☐ Default Value
- Buttons: Add, Delete, Reset

Below these fields is a table titled "Context Parameters" with the following data:

Name	Type	Required	Default Value
ID	Text	No	
PSPExists	Text	No	

At the bottom of the dialog are OK and Cancel buttons.

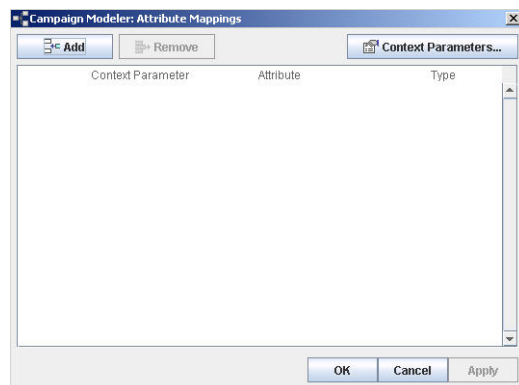
Attribute Mapping


Mapping

Now that the Context Parameters have been added, the next step will be to map attributes to the parameters. This means mapping the data that will flow into and through the entire campaign. In this example, and in all campaigns, this will mean mapping the Target ID.

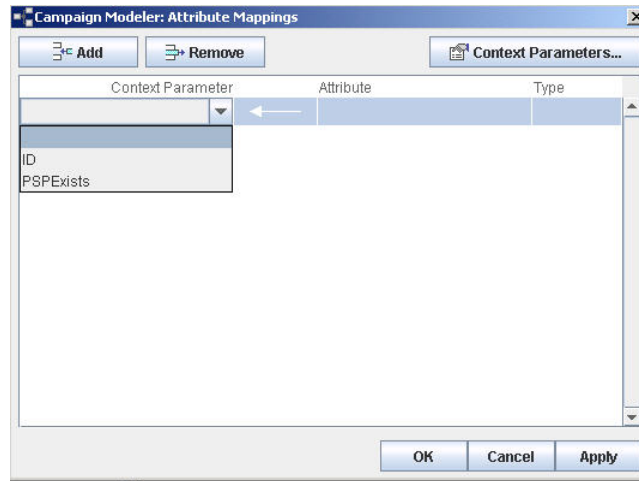
To map an attribute to a Context Parameter:

1. Click  on the right side of the **Attribute Mappings** field to open the Attribute Mappings window.

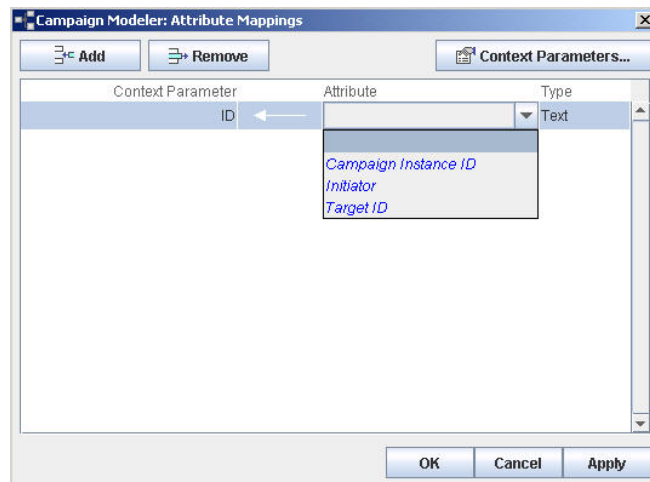


2. Click  to add a new Attribute mapping.

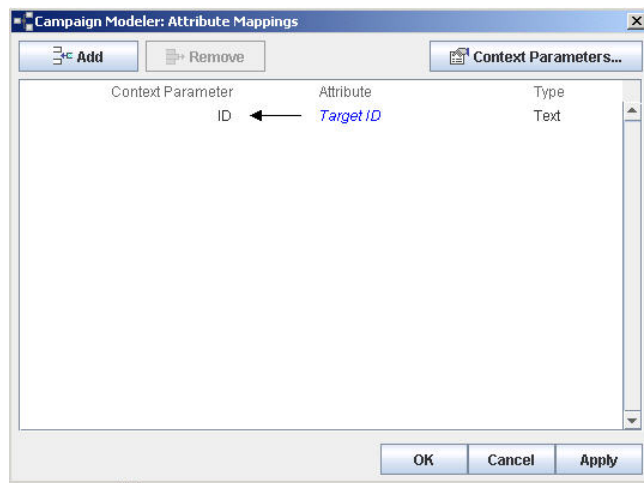
- Click in the white space directly under the Context Parameter heading and select a Context Parameter from the drop down list. These are the parameters which were established in the previous steps. In this example, select ID.



- Click in the white space directly under the Attribute heading and select an Attribute to map to a Context Parameter. In this example, select Target ID.



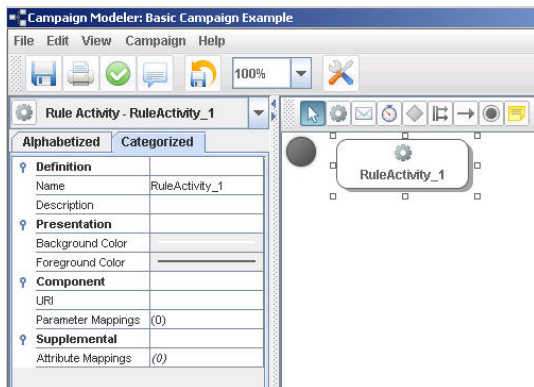
5. The Target ID Attribute has been successfully mapped to the ID Context Parameter.



6. Click **OK** to accept and close the window.

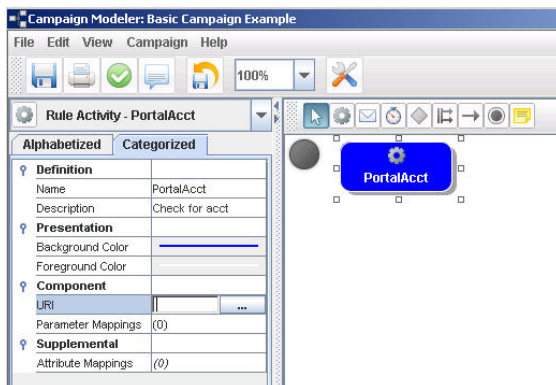
Once we have established the Context Parameters and mapped Attributes that will apply to the entire campaign, we can move on to defining Rule Activity properties.

Define Rule Activity Properties



The **Name**, **Description**, **Background Color** and **Foreground Color** areas can be edited. It is helpful to rename the Rule Activity the same name as the actual URI or Rule to which it refers.


For our example, the Activity was renamed to **PortalAcct**, a definition was added, and the background and foreground colors were changed.

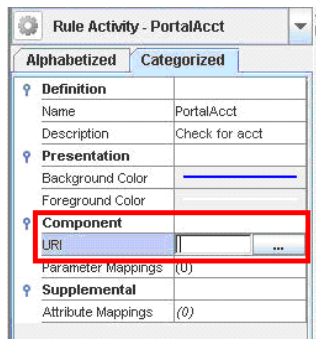


The most important feature of the Rule Activity is in the Component category, where the appropriate URI is selected to process the necessary rule.

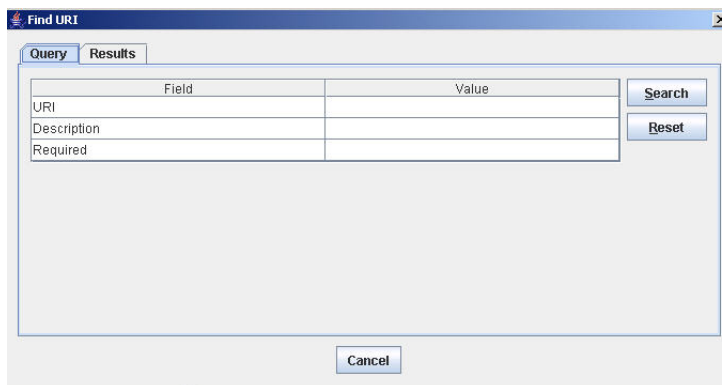
The Rule Activity must check if an individual has a portal account so that a decision can be made (in the Decision node) regarding which letter to send to which person (using Guard Conditions).

To do this we will need to first select the appropriate URI.

1. Click the  search icon next to the URI field.



2. This opens the URI search window.

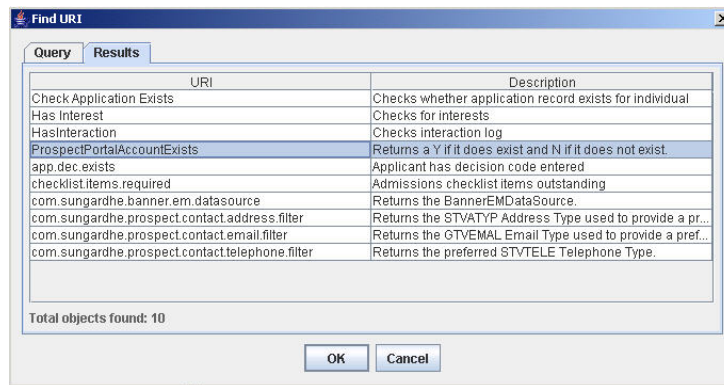


3. Click **Search** and wait for the **Results** tab to open.

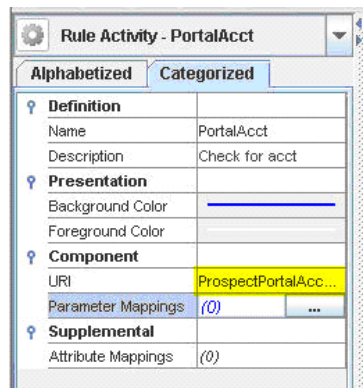
Tip: You can also use the query function to search for a URI. Enter any part of the name you might know (wildcards are accepted) and click the Search button.

Note: If a URI does not exist for your purposes, one will have to be created in the Administration Workspace. For more detailed information, please refer to the Business Rules Administration Training Workbook. Note also that business rules cannot have comments in them or the rest of the rule will **not** be executed from the point of the comment forward.


4. In the Results tab, select the appropriate URI from the result list by either double-clicking the name of the URI, or highlighting and clicking the OK button to accept.

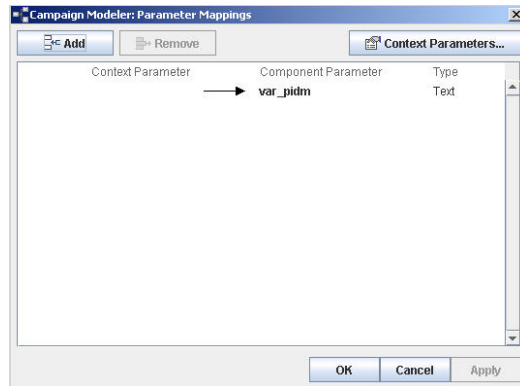


5. The URI name is now visible in the Property Sheet.



The last step needed to complete this activity is to map the parameters using the Parameters Mapping window.

1. To open the window, click the  icon next to Parameter Mappings. This opens the **Parameter Mappings** window.



In this window we will map the Context Parameters (established in the Campaign Model Context Parameter property sheet) to the appropriate Component Parameters established by the URI we selected in the earlier step.

When mapping parameters, the following information applies:

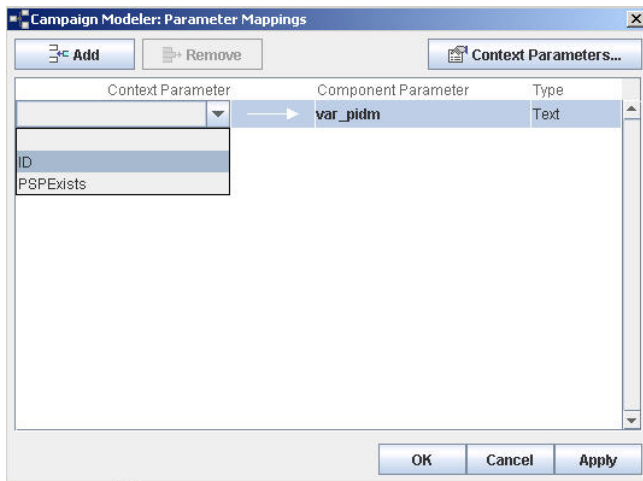
- A parameter is mapped FROM Context TO Component if data is passed to the Component.
- A parameter is mapped FROM Component TO Context if data is set or updated in the Component.
- Remember RINGO
 - Context Parameters are required if they must have a value at the start of the campaign process or activity.
 - Component Parameters are required if they must have a value when the activity starts.
 - Component Parameters are guaranteed if a value is expected at the conclusion of the activity.
 - Component Parameters must be guaranteed if they are used in a Guard Condition.
 - RINGO = Required IN, Guaranteed Out

For our example, a Component Parameter is the person's ID because an ID must exist in order for the Rule Activity to check to see if a person has a portal account. Therefore, the ID is *required* to launch the rule activity and therefore is the Context Parameter.

- The **ID Context Parameter** presents the **Banner PIDM** to the **Rule Activity**.

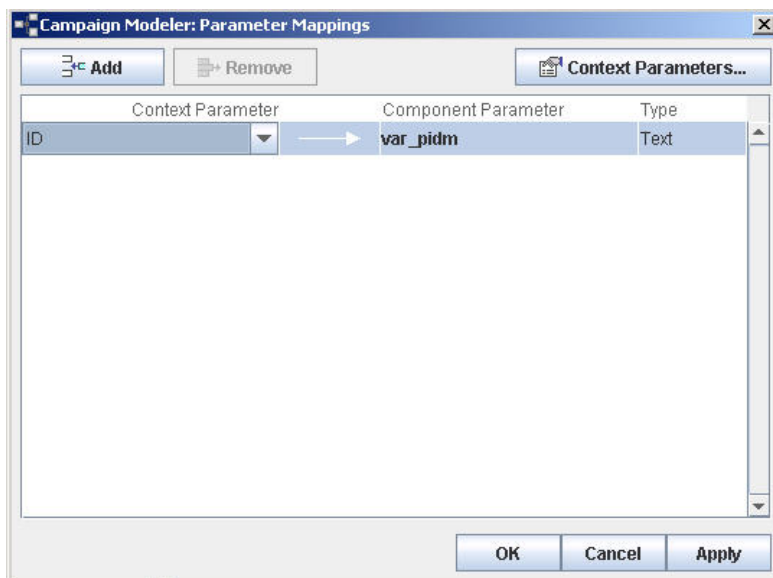
PSP Exists 'yes' or 'no' is *guaranteed* to be returned from the Rule Activity. Therefore the Rule Activity (via the URI we selected) requests portal account status. The PSP Exists Component Parameter queries the database and brings back a status code which is returned to the PSP Exists Context Parameter. The PSP Exists Context Parameter is used to determine the direction the process will flow (based on Guard Conditions which are covered next).

Click in the white space immediately below the Context Parameter heading to see the drop-down list and select a Context Parameter from the list. These are the parameters which were established in the previous section.




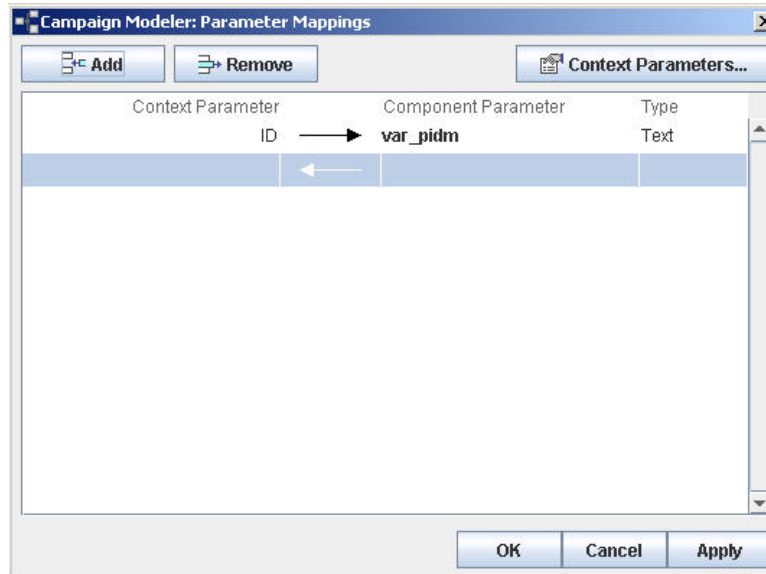
As we established above, the Context Parameter **ID** presents the **Banner PIDM** to the **Rule Activity**. So we will select **ID** from the Context Parameter drop-down.

The arrow points *toward* the Component Parameter **var_pidm** (variable pidm) because this is a Component *input* Parameter.

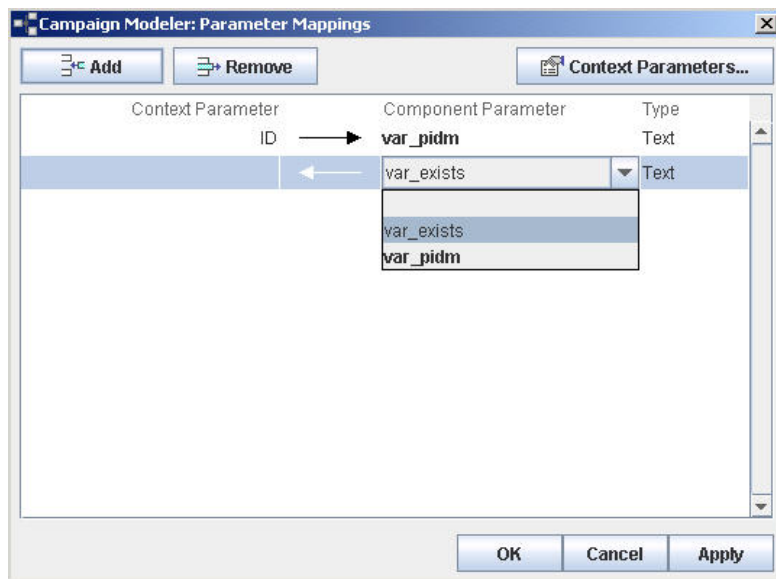


Now we must map the PSP Exists Context Parameter.

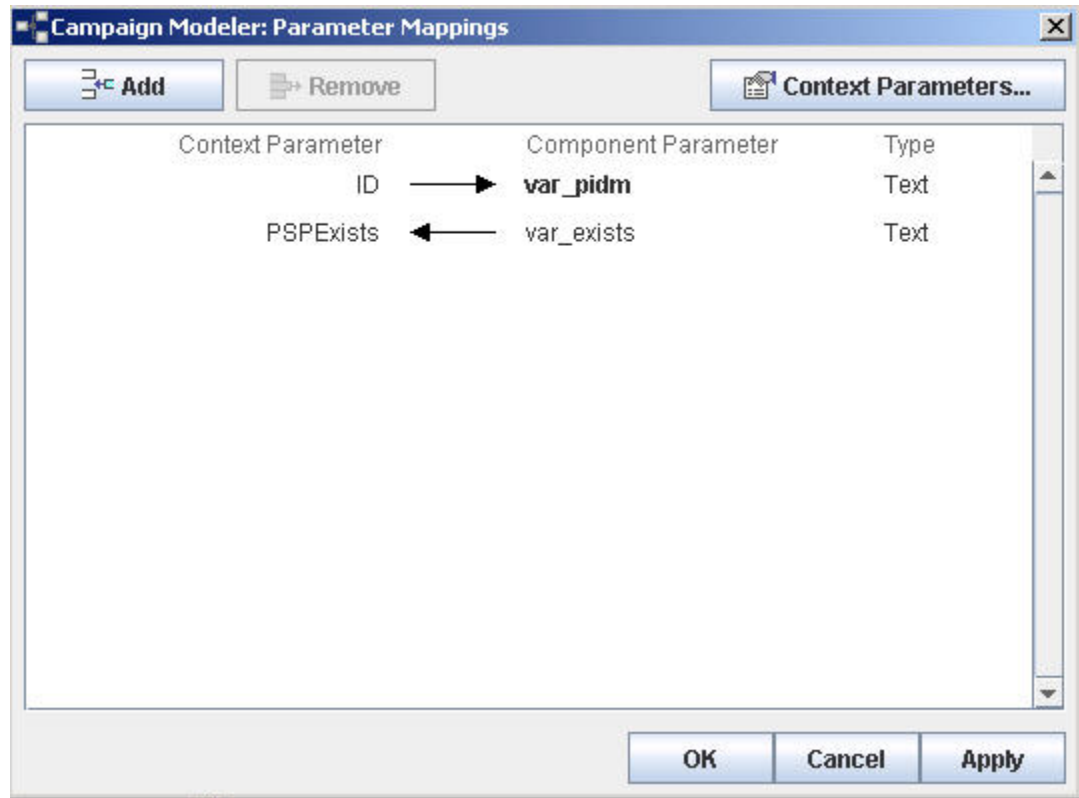
1. Click  to add a new parameter mapping.




2. Notice the arrow auto-populates facing toward the Context Parameter. The arrow points *away* from the Component Parameter because it needs to be a Component *output* Parameter. **Remember RINGO** from above.
3. Select **var_exists** (variable exists) from the drop down menu.





4. Select PSP Exists from the Context Parameter drop-down menu. The Parameter mapping should look like this:



5. You can add additional mappings if the campaign requires it, by clicking the  **Add** button.

Note: The direction of the arrow is significant. The direction indicates input and output for the component. To change the direction of the arrow between the two parameters, select the appropriate direction from the drop-down list for each parameter.

6. To remove a mapping, highlight the line to be removed and click the  **Remove** button.
7. If there is ever a need to edit the model's Context Parameter while working in the **Parameter Mapping** window, click on the  **Context Parameters...** button. The **Context Parameters** window will open as a pop up window.
8. Click **OK** to accept this parameter mapping.

This campaign example calls for two rule activities.


- Therefore we will need to repeat the steps for the second rule activity.

OR

- Since the rule activities are identical (both checking for a valid portal account) we can also create a copy of the activity we just created. To create a second rule activity that is the same as the first one, right-click on the rule activity in the drawing area, and select **Copy**. Right-click again in the drawing area and select **Paste**. You may wish to change the name of this rule activity to show that it is the second activity.

Campaign Decisions

Campaign Decisions

Decisions  are used to show when a decision is being made in a campaign. A decision step allows for alternate paths in a campaign. A Decision node is only a visual marker. The decision to follow a path is based on the Guard Conditions.

The Name, Description and Background Color and Foreground Color can be edited but are not required.

Add Decision nodes to your campaign model.

Decision - DecisionNode_1	
Alphabetized	Categorized
Definition	
Name	DecisionNode_1
Description	
Presentation	
Background Color	
Foreground Color	

Transition Guard Conditions

Transition Guard Conditions

A Guard Condition is evaluated at run-time to make a process level decision. Transition Guard Conditions must evaluate to 'true or false'.

You can use the following elements when you create a transition Guard Condition:

- Constants
- Operators
- Campaign Context Parameters


From any Activity or Decision, only one transition Guard Condition can evaluate to true at a time. If more than one condition can evaluate to true, the attribute evaluation will fail at runtime.

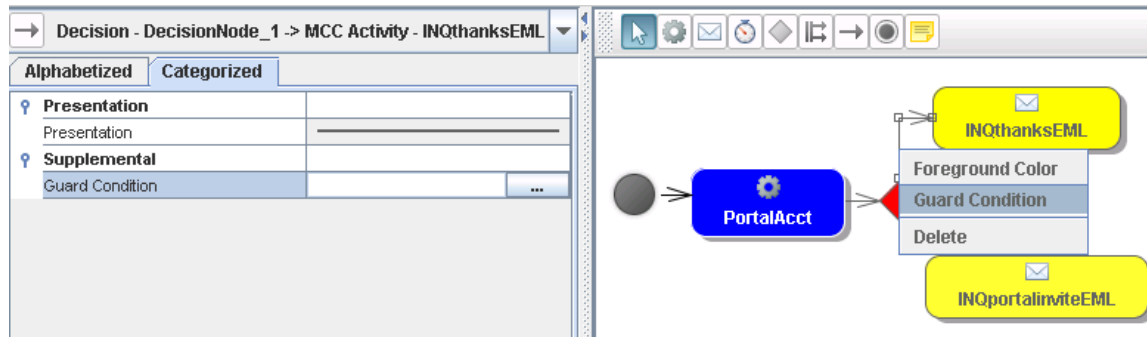
This means that if you have multiple outbound transitions with Guard Conditions that evaluate a complex situation, it is recommended that you use multiple Decisions. For instance, divide a single complex rule into several simple rules that are sequenced through more than one Decision.

In this example the Rule Activity has checked for a valid portal account. Now a decision is made based on the "Does the person have a portal account – Yes or No?".

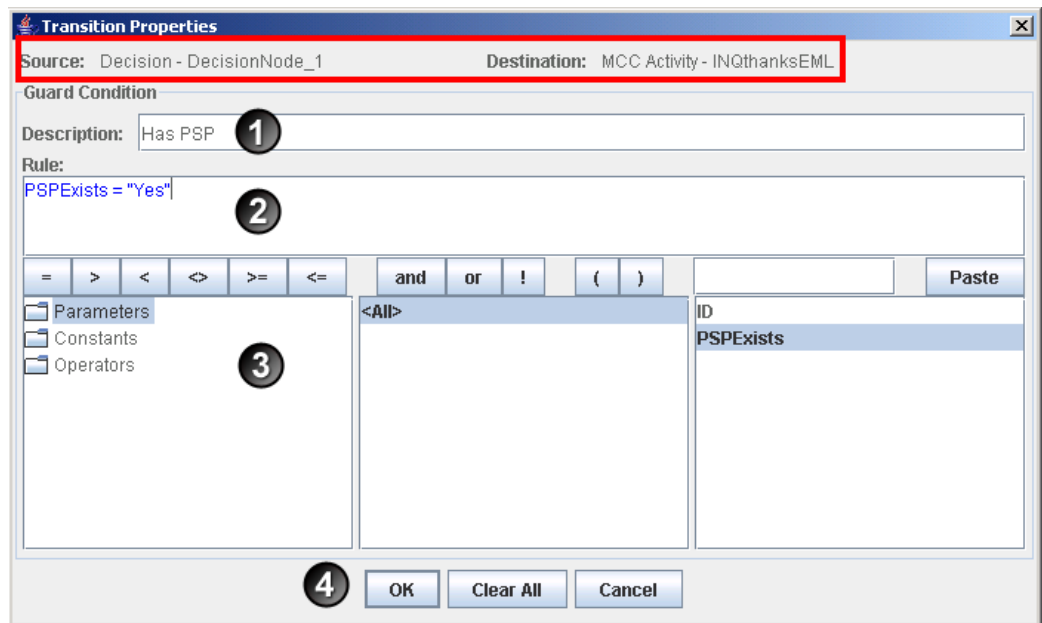
Adding a Guard Condition to the transition ensures the correct correspondence is sent to the correct group.

Create a Guard Condition

1. Connect the various activities in your campaign model using the Transition Tool 
2. Right-click on the Transition line after a Decision node to create the Guard Condition



3. This opens the **Transition Properties** window. Note that the top of the window describes source and destination of the transition.
4. The Guard Condition for this example will need to state that the parameter **PSPExists** equals "Yes".



Transition Properties

Source: Decision - DecisionNode_1 Destination: MCC Activity - INQthanksEML

Guard Condition

Description: Has PSP

Rule: PSPExists = "Yes"

Parameters
Constants
Operators

and or ! () Paste

ID
PSPExists

OK Clear All Cancel

5. Enter the Guard Condition description. The description can be made visible in the modeler.
6. Enter the Guard Condition rule. The campaign parameters, constants, and operators can be typed in manually in the **Rule:** field,

OR

Use the lists in the columns below the Rule field to select campaign parameters, constants, and operators.

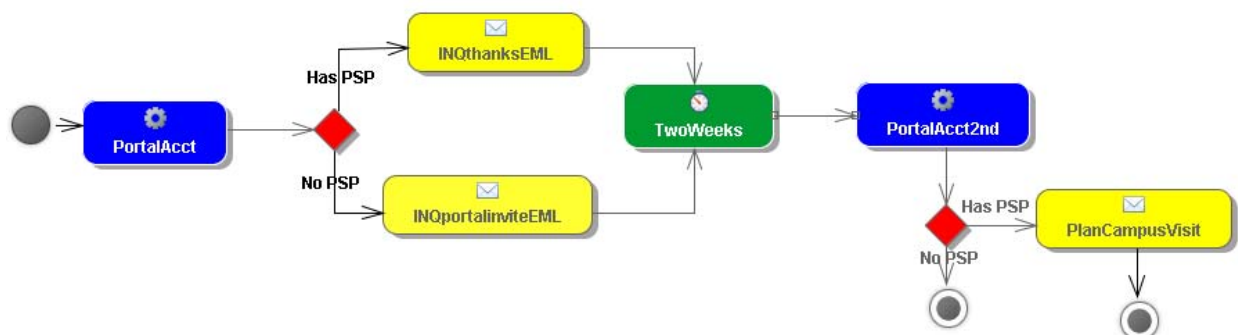
7. Click **OK** to process the information that you provided.
8. Repeat the steps for the Guard Condition where the parameter **PSPExists** equals "No".

Now we need to add the Guard Condition labels to the campaign model:

1. To display a Guard Condition label, right-click on the transition line with the Guard Condition.
2. Select **Show Guard** to display the Guard Condition label.
3. To display the Guard Condition rule instead of a label, leave the Description field empty on the Guard Condition.
4. Drag the Guard Condition label into the desired position on the transition line.
5. Right-click the transition again for new options for hiding or rotating the Guard Condition label.

Foreground Color
Show Guard
Guard Condition
Delete

The campaign now looks similar to the picture below. This is a valid campaign.



Simultaneous Activities

Simultaneous activities

You will often encounter situations where it doesn't matter which activity or which string of activities is performed first, as long as they are all performed before some other activity or before the end of the campaign. When this happens, you can use Parallel paths.


Parallel path guidelines

When you use Parallel paths, you need to follow a few guidelines:

- **Parallel paths require start and end parallel path bars** - All campaign models that use Parallel paths must use beginning and ending Parallel path bars.
- **Decisions within Parallel paths** - If you use a Decision (or multiple outbound transitions from an activity) within a Parallel path, all the possible outcomes of that Decision must rejoin into a single path and end at a closing Parallel path bar.
- **One Parallel path cannot connect to another path** - Activities in a Parallel path cannot connect to activities in another Parallel path.
- **Iteration in a Parallel path must occur within a single path** - You cannot have an activity return to an activity that occurred before the opening Parallel path bar

Parallel paths

To create a Parallel path:

1. Select the Parallel path tool ()
2. Click the drawing canvas where you want to begin the Parallel paths.

To make the Parallel path bar larger or smaller: select it, and then drag an end until it is the size you want.

To rotate the bar 90 degrees: right-click it, then select Rotate.

3. Enter activities between the appropriate Parallel paths.

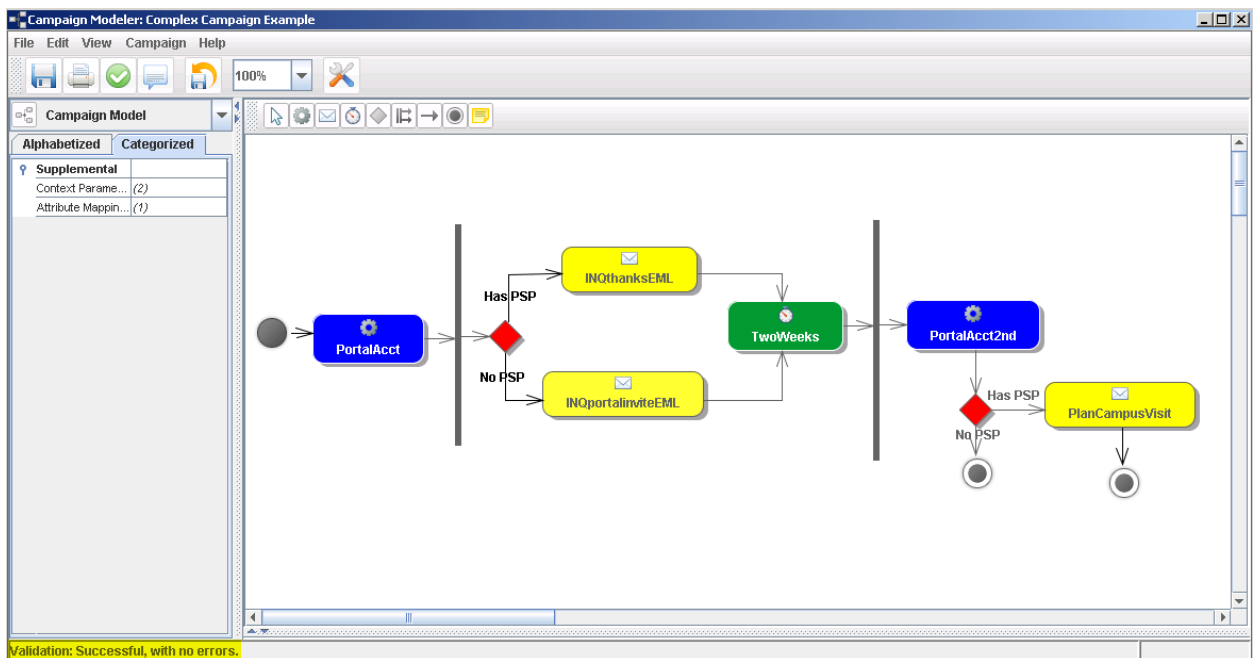
4. Connect the activities:

Connect the object that precedes the start of the Parallel paths to the opening Parallel path bar. This can be a Start, a Decision, or another activity.

Connect all activities within each path as necessary.

5. To end the Parallel paths, enter another Parallel path bar after the last activity in the Parallel paths.
6. Connect the last activity in each Parallel path to the closing Parallel path bar.
7. Connect the closing Parallel path bar to the next object in the campaign. This can be a Decision, another activity, or a Stop.


Add Parallel paths to your campaign model so that it looks like this:



Tip: The ***Banner Enrollment Management Suite – Relationship Management , Getting Started Guide*** is a helpful document for further reading regarding Parallel paths, as well as more information about campaigns. This document is available in the documentation downloads at the Customer Service Center site.

Validate, Activate and Start



Click the Validate icon () to validate the campaign. When the campaign model has successfully validated, it is ready to be used.

As we learned in Campaign Workbook Level I, the next steps would be to:

1. Add a Population List
2. Activate the campaign
3. Start the campaign

Monitoring Alerts



Monitoring Alerts

Introduction

An alert indicates that there is a problem with advancing the flow of a campaign instance. An alert will cause the campaign to stall for that particular campaign instance.

The user assigned the Administrator Role will:

- need to monitor alerts for the campaigns that they administer
- make corrections that allow the campaign instance to advance to the next step

Note: Any user can view the information on the Alert Search screen

Alerts will be indicated on the Status Search screen by an exclamation point (!). They can also be found on the Alert Search screen.

Types of alerts

In general, there are two reasons why an alert would be raised:

- Failed activity alerts – These alerts are raised for *processing* errors. For example, while processing an activity for a campaign instance, the database might be down or the communication template being used in the campaign is marked as inactive.
- Failed transition alerts – These alerts are raised for *transition* errors. For example, while moving from one activity to the next, a Guard Condition (rule) cannot be evaluated.


The screenshot shows the SunGard Banner Relationship Management interface. The main window displays a 'Status Search' table with columns: Target Name, Campaign Name, Status, Start Date, End Date, and Alert. The table lists 15 entries, all with 'Ready' status and 'Aug 12, 2010 11' for both start and end dates. The right sidebar contains 'Campaign Alerts' and 'Status Details' sections. The footer shows copyright information and the SunGard Higher Education logo.

Target Name	Campaign Name	Status	Start Date	End Date	Alert
Flintoff, Mark	Send App Comm	Ready	Aug 12, 2010 11:		
Jacobs, Lisa	Send App Comm	Ready	Aug 12, 2010 11:		
David, Roger	Send App Comm	Ready	Aug 12, 2010 11:		
Luther, Jack	Send App Comm	Ready	Aug 12, 2010 11:		
Father, Tom	Send App Comm	Ready	Aug 12, 2010 11:		
Mendonca, Denis	Send App Comm	Ready	Aug 12, 2010 11:		
Chris, John	Send App Comm	Ready	Aug 12, 2010 11:		
sampson, susan	Send App Comm	Ready	Aug 12, 2010 11:		
Su, hang	Send App Comm	Ready	Aug 12, 2010 11:		
Mëndönçä, Dénit	Send App Comm	Ready	Aug 12, 2010 11:		
Becker, Boris	Send App Comm	Ready	Aug 12, 2010 11:		
Franklin, James	Send App Comm	Ready	Aug 12, 2010 11:		
Jankovic, Justin	Send App Comm	Ready	Aug 12, 2010 11:		
Kramer, Jason	Send App Comm	Ready	Aug 12, 2010 11:		

To view alerts:

1. Access the Campaigns Workspace.
2. Click Status Search

OR

Click  **Advanced Search** to select a combination of attributes, and enter your attribute search criteria. When searching on attributes, any attribute that is not populated will be ignored. Click **Go** to display the results of your search.

A list of names (from the Population List) will display.

3. Any campaign instance with an error will display an '!' (Exclamation point) in the Alert field.
4. Double-click on an individual campaign instance (target name) to be taken to the campaign Status for that individual instance.

Responding to Alerts

Introduction

Alerts allow users to find campaign instances that have reached errors and fix them so the campaign can continue to run. Campaigns provide a way to stall the running instance when the model runs into an Alert condition.

Only the user assigned the Administrator Role is able to respond to Alerts. There are three ways you can respond to an alert on a campaign instance.

- Release – This option allows you to correct the error at an activity in the campaign model and have the campaign start up where it left off.
- Complete – This option tells the campaign to complete this particular activity or transition and go to the next activity.
- Stop – This option halts the campaign for this particular campaign instance.

When the error has been addressed, it will no longer display on the Campaign Alerts panel.

You can see alerts from the

- Status Search link – Perform a search/advanced search and click Go. Those campaign instances with an exclamation point (!) in the **Alert** Field have alerts.
- Alert Search link – Perform a search/advanced search and click Go.

Campaign Error Handling Tips

To minimize campaign errors, consider the following tips:

- Keep branching to a minimum.
- Finalize and Activate Communication templates before a campaign launches. Make sure that those creating and updating communication templates understand which templates are currently in use by campaigns.
- Delete Communication templates with caution: They may be associated to another campaign of which you are unaware. When a Communication template is updated, it becomes Version 1.1, 1.2 etc. A campaign will always use the most recent version of a Communication template.
- Encourage Communication template builders to finalize their work. If a template is not Active and it is associated to a campaign which is later launched (unknowingly), many alerts/errors will occur. This would also cause concern that incorrect information may be sent to prospective students.
- Use template folders and naming conventions that best suit your business practices to able to easily identify the various components of a campaign..

Alert Search Actions: New Refresh Open Copy Delete More Actions Close

Alert Search

Search by Campaign Name

Advanced Search

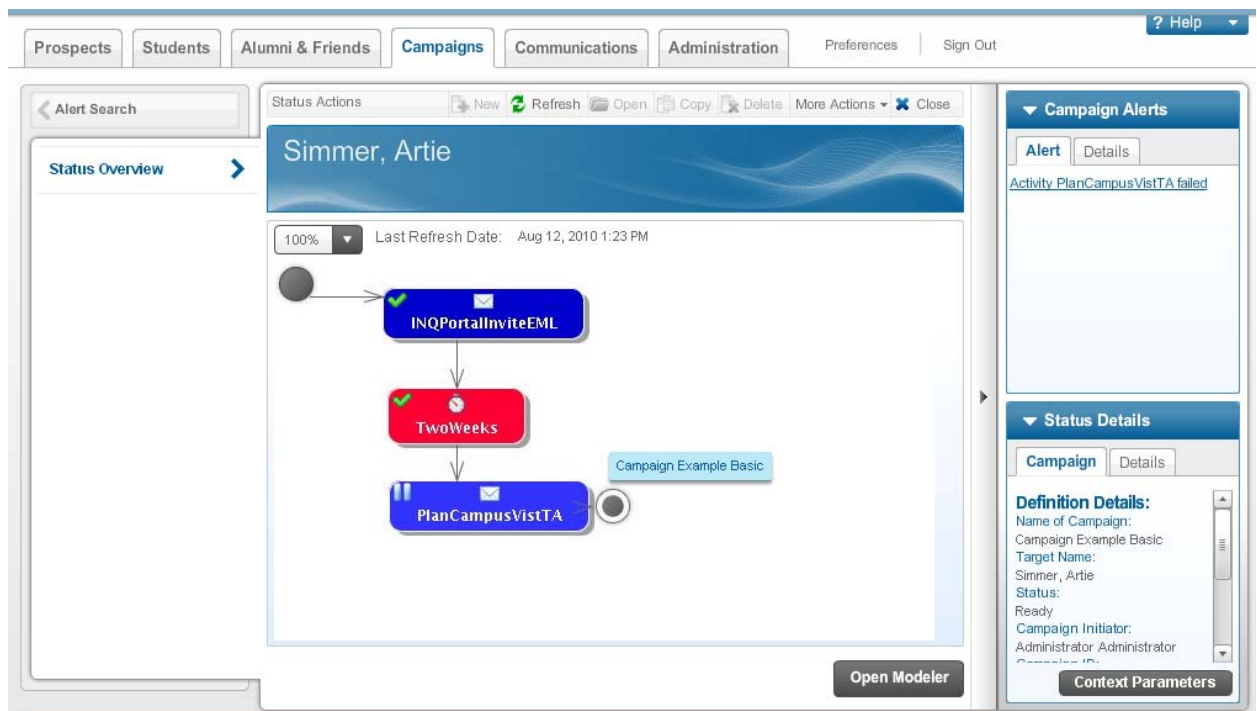
Displaying 2500 rows. Click [Advanced Search](#) to limit rows.


Campaign Name	Target Name	Activity Name	Alert Type
Campaign Example Basic	Touchet, Ernesto	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Godbout, Theo	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Simmer, Artie	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Lohr, Nyla	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Shannon, Gussie	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Negri, Waldo	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Barton, Mistie	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Sydow, Amber	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Vossler, Jerry	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Solleeau, Lorine	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Hudelson, Weldon	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Frederickson, Vesta	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Ceaser, Loyd	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Stockton, Kathrine	PlanCampusVistTA	Auto Activity Invalid Template
Campaign Example Basic	Ogden, Brendon	PlanCampusVistTA	Auto Activity Invalid Template

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Steps

1. Access the Campaigns Workspace.
2. Click the **Alert Search** link.
3. Search to find a specific campaign that has an alert on a campaign instance.
4. If alerts are present, view a description of the alert in the **Alert Type** field.
5. Click on a campaign instance to open the Status view.
6. A graphical representation of the campaign will display in the Workspace.



7. Click on the activity that has stalled, marked with (). The Details tab in the right-hand panel will display the activity where the error occurred and a brief description of the error.
8. Choose how to handle the alert: Release Activity; Complete Activity, or Stop Instance.

Planning Your Campaigns

Complex campaign design can be, as the name indicates, complex. This section walks through pre-design activities that can assist you with creating your campaigns in the Campaigns workspace. These activities are not required but are highly recommended.

Before creating the campaign in the Campaign workspace, there are some questions to ask which can help to establish the campaign's scope. These questions include:

- What do you hope to accomplish with the campaign (campaign goal)?
- How does this campaign support your Enrollment Management strategy and/or business goals?
- What Enrollment Management-related data is needed to carry out the campaign activities?
- Who will be receiving the campaign content (target audience)? You will need to create an Expression to identify this audience and save the resulting Population List to attach to the campaign.
- Who will develop the Business Rules that will be used in the Campaign?
- What information should be included in the communications? Are required Communication Templates in place or do new ones need to be created?
- What is the best method of delivery for the information (e.g., letter, email, targeted announcement)?
- What is the campaign timeline (start, stop, wait periods)?
- How often does the campaign need to occur (once, daily, weekly, etc.)?
- It is advisable to create all the components of the campaign (Expression, Population List, Templates, and Business Rules) before you begin to model your campaign.

Preparing to Create a Campaign

After establishing the scope of the campaign, the following steps will help guide the preparation process. Worksheets for these steps are in the Appendix *Preparing to Create a Campaign* at the end of this workbook.

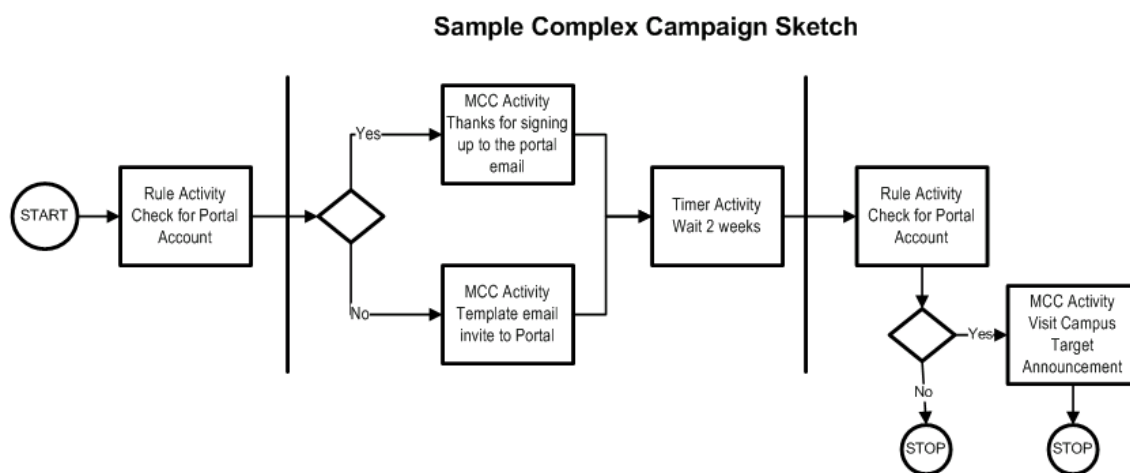
Step 1 – Describe the campaign to be modeled

- What is the name of the campaign?
- What are the business goals for this campaign?
- Describe the “event” that starts the campaign. Be specific.
- Describe the “event” that ends the campaign. Be specific.
- Who “owns” this campaign (handles errors while the campaign is running)?
- What metrics could be used to identify campaign success?

Step 2: Sketch the campaign model on paper

Sketch a model of your campaign as it would look in the Campaign Model Canvas.

- Order of the activities. There are some activities that must happen in a specific order, one activity must occur before going to the next activity. There may be times when multiple activities occurring simultaneously (parallel activity) is more appropriate.
- Logic in the model. There are times when specific data will determine the path of the process. For example, you might want to send one communication to prospects who have submitted an application and a different communication to prospects who need to be reminded to apply before the deadline.



Step 3: Identify each activity in the sketched model

Define the specific activities in your sketched model. The following list describes the activities supported in the Campaign Modeler.

- MCC activity
- Timer activity
- Rule activity
- Decision activity
- Parallel activity

Step 4: Identify activity property details

Complete the detailed information for each activity in your sketch. This information may result in new activities being added to the model. The following describes the information necessary for each activity

MCC activity details

- MCC activity type (e.g., letter, email, targeted announcement):
- MCC activity name:
- Description of activity (optional):
- Communication template used:

Timer activity details

- Timer activity name:
- Description of activity (optional):
- Wait time (in days, hours, minutes):

OR

- Fixed date (date and time):

Rule activity details

- Rule activity name:
- Description of activity (optional):
- URI used:
- Data (parameters) needed

Step 5: Walk through the final sketch

Review your sketch to uncover any issues. Be sure to follow all paths of the campaign model and consider all Enrollment Management-related data that is needed for the campaign to execute (such as PIDM, application status, etc.). Consider whether this modeled sketch will meet your campaign's goals and revise as necessary.

Appendix

Terminology

Term	Definition
Activities	<p>Steps in a campaign. An activity must be “drawn” on the campaign model and “defined” in terms of what work is to be performed and who will do it. There are three types of activities</p> <ul style="list-style-type: none">• Multi-communication (MCC) activity – Used for sending communication to a person(s). Could be a letter, email, or targeted announcement.• Timer activity – Used for setting pre-defined dates/times before enabling the next activity to launch.• Rule activity – Used when data needs to be pulled from a source and the returned value is used to determine process direction.
Administrative Role	The person who “owns” the campaign (e.g., can resolve issues within a campaign).
Alert	An indication that there is a problem with advancing the flow of a campaign instance.
Campaign	<p>A process comprised of individual activities that when performed, are designed to accomplish a specific objective. A campaign includes three components:</p> <ul style="list-style-type: none">• Campaign definition – consists of a campaign name, description, administrative role, population list and campaign goal.• Campaign model – a graphical depiction of a campaign process that represents the flow of activities. Includes flow diagram and property definitions for the model and the activities.• Population list – Comprises the names of individuals to whom you are directing communication.

Term	Definition
Campaign Instance	When a campaign is launched, each individual on the selected population list becomes a campaign instance.
Expressions	A logical statement that identifies the individuals you wish to include in your campaign. It is used to create the population list for the campaign.
Parameters	Data elements used in a campaign. There are two types <ul style="list-style-type: none"> • Context parameters – Define the data used at any time in a campaign model. • Component parameters – Define data used in a particular activity in a campaign.
Population	A pre-defined list of individuals established through Expression Builder.
Population list	A pool of prospects that are associated to and will go through an associated campaign. You will define this list in order to include the appropriate prospects in your campaign.
Status	Indicates whether a campaign has been launched or scheduled (active) or is still in development.
Target	Refers to a prospective student within a campaign. Each member of the campaign target population list represents a target.
Target Instance	Refers to the campaign path for each member of the target population. For example, a campaign targeted to a population list of 500 prospects will have 500 instances, one for each prospect.
URI	Universal Resource Identifier. A URI is the container for a rule set.

Preparing to Create a Campaign – Worksheet

Step 1 – Describe the campaign to be modeled

What is the name of the campaign?

What are the business goals for this campaign?

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

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

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

What metrics could be used to identify campaign success?

Step 2: Sketch the model

Step 3 – Identify each activity in the sketched model

Activity Type	Activity Name

Step 4 – Identify activity details

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

Step 5 – Walk through the final sketch

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

MCC Activity Worksheet

MCC Activity Type:

☐ Email ☐ Letter ☐ Targeted Announcement

MCC Activity Name:

MCC Activity Description:

Communication Template Name:

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

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

Timer Activity Worksheet

Timer Activity Name:

Timer Activity Description:

Wait Time (days, hours, minutes):

OR

Fixed date (date and time):

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

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

Rule Activity Worksheet

Rule Activity Name:

Rule Activity Description:

URI Name:

Parameter Mapping:

Context Parameters	Mapping (Directional Arrows)	Component Parameters

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

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