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Revision History Log

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<td>New version that supports the new Organizations and Communication Configurations features in the Banner Relationship 1.4 software.</td>
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Introduction to Organizations and Communication Configurations

Course goal
The goal of this course is to introduce Relationship Management administrators to organizations and communication configurations functionality, allowing them to create and maintain multiple internal organizations with distinct sender and reply-to accounts.

Course objectives
At the end of this session, participants will be able to:

• add a new organization
• edit an existing organization
• delete an organization
• create a mailbox account
• edit a mailbox account
• set up an organization address
• modify an organization address.

Intended audience
Administrators of Banner Relationship Management.
**Prerequisites**

To complete this course, you should have

- completed the Relationship Management Overview workbook
- access to the *Administration* tab of Banner Relationship Management.
Maintaining Organizations

Introduction

This section provides procedures for creating and maintaining organizations.

Objectives

At the end of this section, participants will be able to:

- add a new organization
- edit an existing organization
- delete an organization.
Organization Overview

Introduction

Organizations allow your institution to send e-mail from various departments within your institution. The organization structure has a single root node which is named ‘Root.’ The Root node may contain zero or more child organizations. All interactions and communication templates must be associated with an organization. Organizations can be created and maintained using the Organizations link on the Administration tab.

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the Communication Configuration link.

Organizations view
Adding a New Organization

Introduction

Only administrators and specified users can create and maintain organizations in Relationship Management. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create organizations, you will have an Organizations link on the Administration tab. From this screen, you can view and edit existing organizations and create new ones.

To create a new organization, select the Root organization then click the Add Child Organization button at the bottom of the workspace and type the name and description of the organization you wish to create. Once you save the organization, it will be added to the list of existing organizations.

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the Communication Configuration link. The organization is not available to use when contacting profiles by e-mail until a mailbox account is set up.
Organizations view

Steps

Follow these steps to create a new organization.

1. Click the **Administration** tab.
2. Click the **Organizations** link.
3. Select the **Root Organization** option from the list to create a new organization under the root level or select any existing organization to create a new child organization under the selected organization.
4. Click the **Add Child Organization** button.
5. Enter a name of the child organization in the **Name** field.
6. Enter a description of the child organization, if desired, in the **Description** field.
7. Click the **Save** button.
Editing an Existing Organization

Introduction

The Organizations Overview page displays high level information about an organization including the organization description and the name and description of any child organizations that exist. You can click the Edit (pencil) icon to edit the name or description of the organization. You can change the name of the organization and/or add or modify a description in the Edit Organization window.

Organization Overview
Steps

Follow these steps to edit an existing organization.

1. From the Administration Tab, click the Organizations link.

2. Double-click the name of the organization you want to edit to open it.

3. Alternatively, click the name of the organization you want to edit then click the Open button on the Organization Actions toolbar.

4. From the Overview window, click the Edit (pencil) icon.

5. Edit the name or description as needed.

6. Click the Save button to save the changes, or Cancel to exit without changes.
Deleting an Organization

Introduction

Organizations that are no longer needed can be deleted using the Organizations link on the Administration tab. Select the organization you want to delete from the list of existing organizations then click the Delete button on the Organization Actions toolbar.

The Confirm Delete window opens asking you to confirm you want to delete the organization. Click the Yes button to complete the process.

Note: Only administrators and specified users can delete organizations in Relationship Management. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create/delete organizations, you will have an Organizations link on the Administration tab.

Organizations view
Steps

Follow these steps to delete an organization.

1. From the Administration Tab, click the Organizations link.
2. Select the name of the organization you want to delete.
3. Click the Delete button.
4. Click the Yes button to confirm you want to delete the selected organization.
Maintaining Communication Configurations

Introduction

This section provides procedures for creating and maintaining communication configurations for organizations.

Objectives

At the end of this section, participants will be able to:

- create a mailbox account
- edit a mailbox account
- set up an organization address
- modify an organization address.
Communication Configuration Overview

Introduction

Organizations contain a name and description only. You can establish and maintain separate mailbox accounts for each organization using the Communication Configuration link. The organization is not available to use when contacting profiles by e-mail until a mailbox account is set up.

Using mailbox accounts, you will be able to specify the email address for the sender account and the reply-to account. You may also specify the letter address information and e-mail address information to use for an organization.

Note: Only administrators and specified users can create or modify mailbox and organization addresses. If you do not have the relevant permissions, you will not have access to this functionality. If you have the ability to create/delete organizations, you will have the Communication Configuration link on the Administration tab.

Communication Configuration view
Creating a Mailbox Account

Introduction

You can establish and maintain separate mailbox accounts for each organization using the Communication Configuration link. Using mailbox accounts, you will be able to specify the email address for the sender account and the reply-to account. You may also specify the letter address information and e-mail address information to use for an organization on the Communication Configuration link. Once the mailbox accounts are established, you can associate them with the organization through the Organization Address Setup link.

To create a new mailbox account, select the Mailbox Accounts link.

Mailbox Accounts view

A list of existing mailbox accounts will display. Use the New button on the Mailbox Account Actions toolbar to add a new mailbox account.
Note: Since you may have multiple sender and reply to accounts, you may want to put the organization name into the name of the account. Notice in this example that you can easily tell the difference between the Admissions and Advising Sender mailbox accounts.

Create Mailbox Account window

The Create Mailbox Account window allows you to select a Sender or Reply To type of account. You can then add a name, description, user name, password, e-mail address and display name. Notice that only items marked with a red asterisk* are required. After entering the mailbox account information, click the **Save** button to store your changes.
Steps

Follow these steps to create a mailbox account.

1. Click the Administration tab.
2. Click the Communication Configuration link.
3. Click the Mailbox Accounts link.
4. Click the New button on the Mailbox Account Actions toolbar.
5. Select a mailbox account type in the Type field.
   
   Note: The default value is Reply To but you can use the drop-down arrow to select Sender.
6. Enter a name for the mailbox account in the Name field.
7. Enter the user name associated with the mailbox account in the Username field.
8. Enter the password associated with the mailbox account in the Password field.
9. Reenter the password in the Confirm Password field.
10. Enter the e-mail address associated with the mailbox account in the Email Address field.
11. Enter a display name, if desired, in the Display Name field.
12. Click the Save button.
Editing a Mailbox Account

Introduction

The Overview page for Mailbox Accounts displays high level information about a mailbox account including the user name, description, type, e-mail address, and display name. You can click the Edit (pencil) icon to edit any of the displayed information except the type.

Overview
Edit Mailbox Account window

To edit a mailbox account, you can change the name of the mailbox account and/or add or modify a description in the Edit Mailbox Account window. You could also add/or modify the **Username**, **Password/Confirm Password**, **Email Address**, and **Display Name** fields. Click the **Save** button to save your changes.

![Edit Mailbox Account](image)

**Steps**

Follow these steps to edit a mailbox account.

1. From the **Administration** Tab, click the **Communication Configuration** link.

2. Click the **Mailbox Accounts** link

3. Double-click the name of the mailbox account you want to edit to open it.

4. Alternatively, click the name of the mailbox account you want to edit then click the **Open** button on the Mailbox Accounts Actions toolbar.

5. From the Overview window, click the **Edit** icon.

6. Edit the fields as needed.

7. Click the **Save** button to save the changes, or **Cancel** to exit without changes
Setting Up an Organization Address

Introduction

Once the mailbox accounts are established, you can associate them with the organization through the **Organization Address Setup** link. You can specify the letter address information and e-mail address information to use for an organization by selecting the **Organization Address Setup** link on the **Communication Configuration** view.
Create Organization Address Setup Window

The Create Organization Address Setup window allows you to use a **Lookup** icon to select the organization, sender account, and reply to account you created previously. You can then add an e-mail address. Notice that all items are marked with a **red asterisk** which means they are all required. After entering the organization address setup information, click the **Save** button to store your changes.

![Create Organization Address Setup Window](image)

Overview view

You can use the **Edit** (pencil) icon to open the Edit Letter Address window and enter the postal address to be used on letters. You can also use the **Edit** icon to modify the e-mail addresses that are displayed.

Once the letter and e-mail addresses are associated to organization using the **Organization Address Setup** link on the **Communication Configuration** view, the organization is available for use with multi-channel communications.
**Steps**

Follow these steps to set up an organization address.

1. Click the **Administration** tab.

2. Click the **Communication Configuration** link.

3. Click the **Organization Address Setup** link.

4. Click the **New** button on the Setup Actions toolbar.

5. Click the Look Up (•••) icon in the **Organization** field to select an organization from the list of available organizations.

   Note that Organizations are not created here, and will need to be set up in the Organization functionality prior to adding them here. For more details, refer to the previous section in this workbook.

6. Click the Look Up (•••) icon in the **Sender Account** field to select a sender account from the list of available mailbox accounts.

   Note that mailbox accounts are not created here, and will need to be set up in the Mailbox Account functionality prior to adding them here. For more details, refer to the previous lessons in this workbook.

7. Click the Look Up (•••) icon in the **Reply To Account** field to select a reply to account from the list of available mailbox accounts.

8. Enter the e-mail address that you want to use to send the e-mails from the selected organization.

9. Click the **Save** button.
Modifying an Organization Address

Introduction

You can use the **Edit** (pencil) icon to open the Edit Letter Address window and enter the postal address to be used on letters. You can also use the **Edit** icon to modify the e-mail addresses that are displayed.

Once the letter and e-mail addresses are associated to organization using the **Organization Address Setup** link on the **Communication Configuration** view, the organization is available for use with multi-channel communications.

Overview view
**Edit Letter Address window**

![Edit Letter Address window](image1)

**Edit Email Address window**

![Edit Email Address window](image2)
Steps

Follow these steps to modify an organization address.

1. From the **Administration** Tab, click the **Communication Configuration** link.

2. Click the **Organization Address Setup** link.

3. Double-click the name of the organization address you want to edit to open it.

4. Alternatively, click the name of the organization address you want to edit then click the **Open** button on the Setup Actions toolbar.

5. From the Overview window, click the **Edit** icon next to the address category (letter address or e-mail address) that you wish to edit.

6. Edit the fields as needed.

7. Click the **Save** button to save the changes, or the **Cancel** button to exit without changes.