Banner Enrollment Management Suite
Relationship Management
Tags Administration Training Workbook

Release 1.4 - August 2010
Updated 08/13/2010
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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.

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 ((IT)) 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 (IT).
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.

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.
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.
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.
Steps

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

![Add Tag dialog box](image)

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.
Applying a Tag to an Item

Introduction

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

If tags cannot be applied on the current screen, this icon will be grayed out (●).
Applying tags from the Tags Display Interface

Click a tag to apply it to the current item. Applied tags will be displayed in that item's summary and will appear in the Tags Display in bold, such as **College of Arts and Science** and **Current Students** in the example below. Multiple tags can be applied to an item.

Unapplying tags

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

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

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

Unapplying tags

To unapply a tag, click on it in the Available Tags list. It should change from being bolded to normal case, and it will be removed from the item's summary.
View Items With A Specific Tag

Introduction

Once a tag has been applied to items in the Relationship Management system, you can use the **Tags** link on the **Administration** tab to view all items to which that tag has been applied.
**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** (EDIT) icon in its Tag Overview block.
Search for Tagged Items

Introduction

Once tags have been applied to items in the Relationship Management system, you can use Advanced Search to search for items that contain specific tags.

Steps

1. Access a menu that contains searchable items that can be tagged. For this example, click the Campaigns tab.

2. Click Advanced Search to call up the advanced search functionality.

3. Select Tags from the criteria list.
4. Use the Look Up icon to view a list of available tags.

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.
Creating An Expression That Uses Tags

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.

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

![Expression Builder](image)

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.