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Introduction to Banner Communication Management

This guide provides information targeted for administrative users at your institution who use Banner Communication Management. This section introduces you to Banner Communication Management.

What is Banner Communication Management?

Banner Communication Management is an Ellucian application that helps your administrative users create, send, and manage communications to constituents across your institution.

<table>
<thead>
<tr>
<th>Communication</th>
<th>Constituents</th>
<th>Typical Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open house invitation</td>
<td>Prospective students</td>
<td>Email, Mobile</td>
</tr>
<tr>
<td>Acceptance and rejection letters</td>
<td>Applicants</td>
<td>Email, Letter</td>
</tr>
<tr>
<td>Welcome email</td>
<td>Incoming freshmen</td>
<td>Email, Letter</td>
</tr>
<tr>
<td>Emergency notice</td>
<td>Students in a residence hall</td>
<td>Email, Mobile</td>
</tr>
<tr>
<td>Acknowledgment of housing request</td>
<td>Students</td>
<td>Email, Letter, Mobile</td>
</tr>
<tr>
<td>Active Holds Notification</td>
<td>Students</td>
<td>Email, Mobile</td>
</tr>
<tr>
<td>Benefits open enrollment notice</td>
<td>Employees</td>
<td>Email, Letter</td>
</tr>
<tr>
<td>Newsletter</td>
<td>Parents</td>
<td>Email, Letter</td>
</tr>
<tr>
<td>Reunion invitation</td>
<td>Alumni</td>
<td>Email, Letter</td>
</tr>
</tbody>
</table>

Features

Your administrative users can use the following Banner Communication Management features to send communications to constituents across your institution.

- Search the Banner database for constituents who should receive a communication.
- Define data fields that can be pulled from the Banner database and inserted into a communication to personalize the communication for each recipient.
• Create communications that contain text, graphics, and personalized data fields.
• Use familiar editing capabilities (such as copy, paste, search, and replace) to create the template for a communication.
• Generate PDF files and download for review.
• View communications sent to a constituent from communications management and manually record interactions that occur outside of the application.
• Organize queries, templates, data fields and interaction types into folders to enhance findability.

Processing flow

Administrative users across your institution use the following high-level process to create and send a communication to constituents.

**Note:** Detailed steps are provided in other sections of this guide.

1. If the communication will contain personalized data (such as a student’s name or employee’s address), define the data fields (business rules) that will pull personalized data from Banner for each recipient.
2. Create a template that contains the content of the communication. The template can include text, graphics, and data fields.
3. Create and run a query that identifies the population of constituents who should receive the communication.
4. Send the communication, based on the template, to the population of constituents. Any personalized data is pulled from Banner and automatically inserted into the communication for each recipient.

5. Generate PDF files of the letter communication and mail to each recipient.

6. View all the communications sent to a constituent and manually record interactions that occur outside of the application.

Example 1
An adviser wants to send an email message to advisees to let them know that the class add date is approaching. The population of advisees is already defined in Banner Communication Management.

1. Define a data field for the student name.
2. Create a template for an email. Include a data field for the student name and information about the approaching add date.
3. Send the email to the previously defined population of advisees. The email is personalized with the name for each recipient.
4. View all the communications sent to a constituent.

Example 2
An admissions counselor wants to send an acceptance letter to students who are accepted for admission.

1. Define data fields for the student first name and mailing address.
2. Create a template for an acceptance letter. Include a congratulatory message, data fields for student first name and mailing address, and the school logo.
3. Create and run a query that identifies the students who should receive the acceptance letter.
4. Send the acceptance letter to the selected population of students. The letter is personalized with the first name and mailing address for each recipient.
5. Generate PDF files of the sent letters and mail them to each recipient.

Example 3
The bursar’s office wants to send a mobile notification to remind students to take care of active hold(s) on their accounts.

1. Define a data field for student active holds.
2. Create a template for a mobile notification. Include a data field for students active holds.
3. Create and run a query that identifies the students whose accounts have active holds as of a specific date.
4. Send the mobile notification to the selected population of students. The mobile notification is personalized with the active holds for each recipient.
5. View all the communications sent to a constituent.
Security considerations

Security setups at the organizational level and at the user level determine which folders you can access and which tasks you can perform.

Organizational security

Your application administrator can use Fine Grained Access (FGAC) to manage which Banner Communication Management folders you can access.

Admissions counselors can be restricted to folders that are set up for the Admissions Office.

Role-based security

Your Banner Web Tailor role determines which Banner Communication Management tasks you can perform.

You are assigned one of the following Banner Web Tailor roles, based on your job function.

• End user – COMMUNICATIONUSER role
• Author – COMMUNICATIONCONTENTADMIN role
• Application administrator – COMMUNICATIONADMIN role

Table 1: Tasks that an end user (role COMMUNICATIONUSER) can perform

<table>
<thead>
<tr>
<th>Component</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>View folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Queries</td>
<td>View and run queries in folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Populations</td>
<td>• View populations in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new populations.</td>
</tr>
<tr>
<td>Templates</td>
<td>View templates in folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Data fields</td>
<td>View and test data fields in folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Parameters</td>
<td>View data field parameters in folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Communications</td>
<td>• Create messages based on existing templates and populations in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• View and manage communication jobs created by the user.</td>
</tr>
<tr>
<td>Interactions</td>
<td>View interactions for a constituent with the ability to record manual interactions that occur outside of communications management.</td>
</tr>
</tbody>
</table>
Table 2: Tasks that an author (role COMMUNICATIONCONTENTADMIN) can perform

<table>
<thead>
<tr>
<th>Component</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>• View folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new folders.</td>
</tr>
<tr>
<td></td>
<td>• Edit and delete folders that were created by the user.</td>
</tr>
<tr>
<td>Queries</td>
<td>• View, copy, edit, delete, and run queries in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new queries to folders that the user is authorized to access.</td>
</tr>
<tr>
<td>Populations</td>
<td>• View populations in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new populations.</td>
</tr>
<tr>
<td></td>
<td>• Delete populations that were created by the user.</td>
</tr>
<tr>
<td>Templates</td>
<td>• View, copy, and publish templates in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new templates to folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Edit and delete templates that were created by the user.</td>
</tr>
<tr>
<td>Data fields</td>
<td>• View, copy, and test data fields in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new data fields to folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Edit and delete data fields that were created by the user.</td>
</tr>
<tr>
<td>Parameters</td>
<td>• View, copy and test data field parameters in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Add new data field parameters to folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• Edit and delete data field parameters that were created by the user.</td>
</tr>
<tr>
<td>Communications</td>
<td>• Send communications for templates and populations that are in folders that the user is authorized to access.</td>
</tr>
<tr>
<td></td>
<td>• View and manage communication jobs created by the user.</td>
</tr>
<tr>
<td>Interactions</td>
<td>View interactions with constituents with the ability to record manual interactions that occur outside of communications management.</td>
</tr>
</tbody>
</table>

Table 3: Tasks that an application administrator (role COMMUNICATIONADMIN) can perform

<table>
<thead>
<tr>
<th>Component</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folders</td>
<td>• View, edit, and delete any folder.</td>
</tr>
</tbody>
</table>

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## Component Tasks

<table>
<thead>
<tr>
<th>Component</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queries</td>
<td>• View, copy, edit, delete, and run any query.</td>
</tr>
<tr>
<td></td>
<td>• Add new queries to any folder.</td>
</tr>
<tr>
<td>Populations</td>
<td>View and delete any population</td>
</tr>
<tr>
<td>Templates</td>
<td>• View, copy, edit, delete, and publish any template.</td>
</tr>
<tr>
<td></td>
<td>• Add new templates to any folder.</td>
</tr>
<tr>
<td>Data fields</td>
<td>• View, copy, edit, delete, and test any data field.</td>
</tr>
<tr>
<td></td>
<td>• Add new data fields to any folder.</td>
</tr>
<tr>
<td>Parameters</td>
<td>• View, copy, edit, and test any data field parameters.</td>
</tr>
<tr>
<td></td>
<td>• Add new data field parameters to any folder.</td>
</tr>
<tr>
<td>Communications</td>
<td>• Send communications for any template and any population.</td>
</tr>
<tr>
<td></td>
<td>• View and manage communication jobs created by all users.</td>
</tr>
<tr>
<td>Organizations</td>
<td>• View and edit organization information, email server settings,</td>
</tr>
<tr>
<td></td>
<td>email account settings, and mobile notification settings.</td>
</tr>
<tr>
<td></td>
<td>• Add new organizations.</td>
</tr>
<tr>
<td>Error Log</td>
<td>View a list of errors that occurred when sending a communication.</td>
</tr>
<tr>
<td>Communication Log</td>
<td>View a list of communications that were sent by all users.</td>
</tr>
<tr>
<td>Interactions</td>
<td>View interactions for a constituent with the ability to record manual</td>
</tr>
<tr>
<td></td>
<td>interactions that occur outside of communications management.</td>
</tr>
<tr>
<td>Interaction Types</td>
<td>• View, copy, edit, and delete interaction types.</td>
</tr>
<tr>
<td></td>
<td>• Add new interaction types to any folder.</td>
</tr>
</tbody>
</table>

## Available documentation

Banner Communication Management is delivered with an installation guide, configuration and administration guide, and user guide.

<table>
<thead>
<tr>
<th>Document</th>
<th>Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Banner Communication Management Installation Guide</em></td>
<td>System administrator</td>
<td>Provides steps to install the application.</td>
</tr>
</tbody>
</table>
### Login steps

You can log in to Banner Communication Management as a standalone product.

**Procedure**

1. Access the Banner Communication Management URL given to you by your administrator.
   
   For example: `<server>:<port>/CommunicationManagement`

2. Enter your user name and password.

3. Click **Sign In**.

   The Banner Communication Management landing page displays.

### Landing page of the user interface

The landing page of the Banner Communication Management user interface contains options for performing communication tasks.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Communications                | Use this option to view all of the communication jobs that have been initiated for processing for the institution (MEP code) for which you are logged in.  
<pre><code>                             | Send a communication to constituents.                                                                                                        |
</code></pre>
<p>|                               | If you are an administrative user, all jobs are displayed, not just yours.                                                                      |
| Templates, Data fields, and Parameters | Use this option to define the format and content of a communication that you want to send to constituents. Also use this option to define a data field and data field parameters that pull personalized data from Banner. | Send a communication to constituents.                                                                                                        |
| Populations                   | Use this option to view a list of constituents in a population, send a communication to constituents in a population.                         |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queries</td>
<td>Use this option to define and run a query that select groups of constituents in Banner.</td>
</tr>
<tr>
<td>Folders</td>
<td>Use this option to organize templates, data fields, queries, and populations.</td>
</tr>
<tr>
<td>Interactions</td>
<td>Use this option to define interaction types. Also use this option to view the interactions with a constituent and manually record an interaction that occurred outside of communications management.</td>
</tr>
<tr>
<td>System Functions</td>
<td>Use this option to review a log of errors, review a log of all communications, manage organization information, and manage email and mobile notification settings.</td>
</tr>
</tbody>
</table>

**Note:** This option is only available to the application administrator.
Using Templates

This section provides information about creating and maintaining the templates that define the content and format of communications.

You can define the following types of templates:

- Email
- Letter
- Mobile notifications (including mobile phones and other mobile devices such as tablets)

What is a template?

A template provides the format and content of a communication that can be sent to constituents.

For example, you can use a template to define the format and content of a welcome email that you want to send to all incoming freshmen students or to create a letter of acceptance that you want to send to all applicants who have been accepted to your institution for the upcoming semester or to define a mobile notification to remind registered students that the add/drop date is approaching.

Templates support the following features:

- Simple text
- Formatted text
- Images
- Tables
- Fields that can be personalized for the recipients (for example, name and major)
- Editing capabilities (such as copy, paste, search, and replace)
- Communication previews

Template status

A template is active if it is published and valid for the current date. Only active templates can be used to send communications to constituents.

A template is inactive if either of the following conditions exists:

- The template is not published yet.
- The template is published, but the template is not valid for the current date.

Personal and shared templates

By default, a template is personal to the creator. Only the creator can edit and use a personal template.

The creator can choose to make the template shared so it is available for other authorized users to use. After a template is shared, it cannot be made personal again.
Search for a template

You can search for an existing template by using the full template name, any part of the template name, or wildcards.

About this task

You can search for templates that are stored in the folders that you are authorized to access.

Procedure

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. On the **Templates** tab, enter the search string in the **Search by Template Name** field. Refer to Template search criteria on page 15 for details about the format of the search string.
3. Press **Enter** to display the search results.

Template search criteria

You can use various search criteria to find a template.

**Note:** A search string is not case sensitive. Special characters in a search string are ignored or removed from the query. For example, the string `sp^$r` becomes `spr`.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full template name</td>
<td>Finds the template with the exact matching name.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all template names that contain the specified search string.</td>
</tr>
<tr>
<td></td>
<td>Example: The search string <strong>assign</strong> finds templates that are named Room Assignment and Assign Adviser.</td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all template names that contain the specified characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The following search strings find all template names that contain the characters <strong>student</strong>.</td>
</tr>
<tr>
<td></td>
<td>• %student</td>
</tr>
<tr>
<td></td>
<td>• student%</td>
</tr>
<tr>
<td></td>
<td>• %student%</td>
</tr>
<tr>
<td></td>
<td>• *student</td>
</tr>
<tr>
<td></td>
<td>• student*</td>
</tr>
<tr>
<td></td>
<td>• <em>student</em></td>
</tr>
</tbody>
</table>
### Search Criteria

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
</table>
| ? or _ wildcards | Finds all template names that contain the specific number of characters.  
Example: The search strings `welcome??letter` and `welcome__letter` find all template names that start with `welcome`, followed by any two characters, followed by `letter`. |

---

### View an existing template

You can view information about an existing template and the content of the template.

**About this task**

You can view templates that are stored in the folders that you are authorized to access.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. On the **Templates** tab, scroll to or search for the template that you want to view, and select it.
3. Click **Open**.
4. Review information about the template on the **Overview** tab.
5. Select the **Email Content** tab, **Letter Content** tab, or **Mobile Notification Content** tab, as applicable, to review the contents of the template.  
For a Letter template, you can optionally review the **Page Settings** tab.

---

### Create a template for an email

You can create a template for an email that you want to send to a population of constituents.

**Before you begin**

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a template.
- The folder where you want to store the template must already be defined.
- If you want to include data fields in the template, the data fields must already be defined.

**About this task**

- You can insert data fields (such as name, major, and address) into the template to personalize the email for each recipient when the communication is processed.
• You can insert images and tables into the template.
• You can use editing capabilities (such as copy, paste, search, and replace) when creating the template.

Procedure
1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. On the **Templates** tab, click **Add**.
3. Enter data about the template on the **Add Template** page.
   • A unique template name is required.
   • A folder name is required. This is the folder where you want to store the template. The **Folder** drop-down list shows the folders that you are authorized to access.
   • Select **Email** as the communication method.
   • The **Created By** field is your Oracle ID and cannot be changed.
   • The **Valid From** date defaults to the current date. You can change this to a later date if you want.
   • The **Valid To** date is optional. If blank, the template is valid indefinitely.
   • By default, the template is personal for your use only. You can select the **Would you like to share this template?** option to share the template with other authorized users. If you share the template, you cannot make it personal again.
4. Click **Save**.
5. Select the **Email Content** tab.
6. Click the **Edit** icon.
7. Enter the content of the email.
   • The **To** field is required. This is the formatted data field that pulls each recipient’s email address from Banner. Refer to **Data field formatting** on page 33 for details about formatting the email address.
   • The **Subject** field is required.
   • You cannot enter a reply-to or sender email address. These email addresses default from values that are set up by your application administrator for the institution.
   • You can use familiar editing features (such as copy, paste, search, and replace) and formatting features (such as font, alignment, and lists) to create content in the **Message** section. Refer to **Content editing features** on page 18 for a list of the editing and formatting features.
   • You can insert tables and images.
   • You can copy and paste content from a Microsoft Word or Microsoft Excel document.
   • A dollar sign ($) is used as the delimiter for data field names. If you need to use a dollar sign to indicate a monetary amount, use the characters \$. For example: **Your financial aid award of \$1,000 will be credited on September 1.**
8. **Optional:** To insert a data field that personalizes the content:
Using Templates

a) Place the cursor where you want to insert the personalized data.
b) Click Insert Data Fields.
c) In the left list of the Data Fields pane, select the folder that contains the data field that you want to insert.
d) In the right list of the Data Fields pane, select the data field that you want to insert.
The list shows published data fields only.
e) Click Insert.
f) Repeat these steps for each data field that you want to insert.
An alternate way to insert a data field into the template is to manually enter the data field name with dollar sign ($) delimiters. You must enter the data field name correctly.

9. Click Save.
If the template includes data fields, preview values are displayed for any data fields that have preview values. Data field names are displayed for data fields that do not have preview values.

10. Click the Preview icon in the editing toolbar.

11. Review the email.

12. Close the preview page.

13. If necessary, update and save the content of the email.

14. Optional: If you are ready to make the template available for use, click Publish.
If the current date is in the valid date range, the template is now active. After the template is published, the Create Message button appears on all pages from which you can create messages, including this page.

15. Optional: If you published the template and want to send the communication now, click Create Message.
Refer to Create messages on page 62 for more information.

Content editing features

You can use the following toolbar buttons on the Email Content page to edit and format the content of an email.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>Displays the email content in HTML format</td>
</tr>
<tr>
<td>New Page</td>
<td>Clears the editing area, creating a blank page</td>
</tr>
<tr>
<td>Preview</td>
<td>Displays a preview of the email as it will be seen by recipients</td>
</tr>
<tr>
<td>Templates</td>
<td>Displays predefined email templates that you can use to format the email</td>
</tr>
<tr>
<td>Cut</td>
<td>Cuts text and places it on your clipboard</td>
</tr>
</tbody>
</table>
### Using Templates

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Copy] Copier</td>
<td>Copies text to your clipboard</td>
</tr>
<tr>
<td>![Note] Note:</td>
<td>If your browser blocks this feature, use Ctrl+C.</td>
</tr>
<tr>
<td>![Paste] Paster</td>
<td>Pastes text from your clipboard to the email content</td>
</tr>
<tr>
<td>![Note] Note:</td>
<td>If your browser blocks this feature, use Ctrl+V.</td>
</tr>
<tr>
<td>![Paste as plain text]</td>
<td>Pastes text, minus formatting, from your clipboard to the email content.</td>
</tr>
<tr>
<td>![Note] Note:</td>
<td>If your browser blocks access to your clipboard, a text box is displayed. 1. Use Ctrl+V to paste the text into the text box. 2. Then click OK to paste the text into the email content.</td>
</tr>
<tr>
<td>![Paste from Word]</td>
<td>Pastes text that was copied from Microsoft Word or Microsoft Excel into the email content, preserving basic formatting from the original text.</td>
</tr>
<tr>
<td>![Note] Note:</td>
<td>If your browser blocks this feature, use Ctrl+V.</td>
</tr>
<tr>
<td>![Note] Note:</td>
<td>To avoid conflicts with the email that you are creating, some font styles from the original text are not preserved.</td>
</tr>
<tr>
<td>![Undo] Undo</td>
<td>Cancels the latest change and restores the previous content.</td>
</tr>
<tr>
<td>![Redo] Redo</td>
<td>Reverts the latest undo operation and restores the content that existed before the undo.</td>
</tr>
<tr>
<td>![Find] Find</td>
<td>Searches the email content for a character string. Options include:  • Match case.  • Match whole-words only.  • Restart the search when the end of text is reached (cyclic).</td>
</tr>
<tr>
<td>![Replace] Replace</td>
<td>Replaces text with another character string. Options include:  • Replace one or all occurrences.  • Match case.  • Match whole-words only.  • Restart the replace when the end of text is reached (cyclic).</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>✡️ Select All</td>
<td>Selects all content in the email, making it easier to apply formatting to the entire email.</td>
</tr>
<tr>
<td>✝️ Spell Checker</td>
<td>Provides a spell checker, grammar checker, and thesaurus.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Out-of-the-box, this feature supports ads. If you do not want ads, your institution must purchase a license from <a href="http://www.webspellchecker.net">http://www.webspellchecker.net</a>.</td>
</tr>
<tr>
<td>Normal Paragraph Format</td>
<td>Applies a format style to the selected text.</td>
</tr>
<tr>
<td>✒️ Font Name</td>
<td>Applies a font to the selected text.</td>
</tr>
<tr>
<td>Font Size</td>
<td>Applies a font size to the selected text.</td>
</tr>
<tr>
<td>✍️ Text Color</td>
<td>Applies a text color to the selected text.</td>
</tr>
<tr>
<td>✍️ Background Color</td>
<td>Applies a background color to the selected text.</td>
</tr>
<tr>
<td>🆕️ Bold</td>
<td>Formats the text with bold font.</td>
</tr>
<tr>
<td>✲️ Italic</td>
<td>Formats the text with italics.</td>
</tr>
<tr>
<td>✚️ Underline</td>
<td>Formats the text with underline.</td>
</tr>
<tr>
<td>✎️ Strike Through</td>
<td>Formats the text with a strike-through.</td>
</tr>
<tr>
<td>✏️ Remove Format</td>
<td>Removes all formatting from the selected text, resulting in plain text.</td>
</tr>
<tr>
<td>✍️ Numbered List</td>
<td>Inserts and removes a numbered list.</td>
</tr>
<tr>
<td>✍️ Bulleted List</td>
<td>Inserts and removes a bulleted list.</td>
</tr>
<tr>
<td>✏️ Decrease Indent</td>
<td>Removes nested indents from numbered and bulleted lists.</td>
</tr>
<tr>
<td>✏️ Increase Indent</td>
<td>Indents items in numbered and bulleted lists to provide nesting.</td>
</tr>
<tr>
<td>✋️ Create Div Container</td>
<td>Adds a container around a document fragment so formatting can be applied to the fragment.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This feature is intended for advanced users.</td>
</tr>
<tr>
<td>✎️ ✎️ ✎️ ✎️ Align</td>
<td>Aligns text (left, centered, right, or justified).</td>
</tr>
<tr>
<td>✉️ Link</td>
<td>Adds a clickable hyperlink for a URL, anchor in the document, or email address.</td>
</tr>
<tr>
<td>✉️ Unlink</td>
<td>Removes a clickable hyperlink, leaving plain text.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><img src="image" alt="Anchor" /></td>
<td>Creates an anchor that can be used as the target of a hyperlink within the document.</td>
</tr>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Inserts, edits, and manages an image.</td>
</tr>
<tr>
<td><img src="image" alt="Table" /></td>
<td>Creates and formats a table.</td>
</tr>
<tr>
<td><img src="image" alt="Insert Horizontal Line" /></td>
<td>Inserts a horizontal line.</td>
</tr>
<tr>
<td><img src="image" alt="Insert Special Character" /></td>
<td>Inserts special characters that are not part of a normal keyboard.</td>
</tr>
<tr>
<td><img src="image" alt="Insert Page Break for Printing" /></td>
<td>Inserts a horizontal page break, allowing you to divide text into physical pages for printing.</td>
</tr>
<tr>
<td><img src="image" alt="Maximize" /></td>
<td>Toggles the editor, inside the browser window, between maximized and normal view.</td>
</tr>
<tr>
<td><img src="image" alt="Show Blocks" /></td>
<td>Shows borders around blocks of content.</td>
</tr>
<tr>
<td><img src="image" alt="About CKEditor" /></td>
<td>Shows the version number, documentation link, and licensing link for the CKEditor editing tool.</td>
</tr>
</tbody>
</table>

**Insert a data field into a template**

You can insert data fields into a template to personalize the communication for each recipient. Examples include name, major, and address. When the communication is processed, data is pulled from Banner and inserted into the communication for each recipient.

**Before you begin**

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to insert data fields into a template.
- The personalized data fields must already be defined.

**About this task**

The following steps tell you how to use a pick list to insert a data field into a template. An alternate way is to manually enter the data field name with dollar sign ($) delimiters. You must enter the data field name correctly.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. On the **Templates** tab, scroll to or search for the template that you want to update with data fields, and select it.

3. Click **Open**.

4. Select the **Email Content** tab.

5. Click the **Edit** icon.

6. Place the cursor where you want to insert the personalized data.

7. Click **Insert Data Fields**.

8. In the left list of the **Data Fields** pane, select the folder that contains the data field that you want to insert.

9. In the right list of the **Data Fields** pane, select the data field that you want to insert. The list shows published data fields only.

10. Click **Insert**.

11. Repeat these steps for each data field that you want to insert.

12. Click **Save**.

   - Preview values are displayed for any data fields that have preview values.
   - Data field names are displayed for data fields that do not have preview values.

13. Click the **Preview** icon in the editing toolbar.

14. Review the email.

15. Close the preview page.

16. If necessary, update and save the content of the email.

---

### Create a template for a letter

You can create a template for a letter that you want to send to a population of constituents.

**Before you begin**

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a template.
- The folder where you want to store the template must already be defined.
- If you want to include data fields in the template, the data fields must already be defined.

**About this task**

- You can insert data fields (such as name, major, and address) into the template to personalize the email for each recipient when the communication is processed.
- You can insert images and tables into the template.
- You can use editing capabilities (such as copy, paste, search, and replace) when creating the template.
Procedure

1. Click **Templates and Data** field on the Banner Communication Management landing page.
2. Select the **Templates** tab.
3. Click **Add**.
4. Enter data about the template on the Add Template page.
   a) Enter a unique template name.
   b) Enter a folder name.
      This is the folder where you want to store the template. The **Folder** drop-down list shows
      the folders that you are authorized to access.
   c) Select **Letter** as the communication method.
   d) The **Created By** field is your Oracle ID and cannot be changed.
   e) The **Valid From** date defaults to the current date.
      You can change this to a later date if you want.
   f) The **Valid To** date is optional.
      If blank, the template is valid indefinitely.
   g) By default, the template is personal for your use only. You can select the **Would you like to share this template?** option to share the template with other authorized users. If you share
      the template, you cannot make it personal again.
5. Click **Save**.
6. Select the **Letter Content** tab.
7. Click **Edit**.
8. Enter the content of the letter.
   a) The **To** field is required.
      This is the formatted data field that pulls each recipient's mailing address from Banner.
      Refer to **Data field formatting** for details about formatting the mailing address.
      If the **To** field is not populated, or if the data field resolves to a null value, the letter will fail to
      send and will generate an error.
   b) You can use familiar editing features (such as copy, paste, search, and replace) and
      formatting features (such as font, alignment, and lists) to create content in the Message
      section.
      Refer to **Content editing features** for a list of the editing and formatting features. You
      can insert tables and images. You can copy and paste content from a Microsoft Word or
      Microsoft Excel document.
      A dollar sign ($) is used as the delimiter for data field names. If you need to use a dollar
      sign to indicate a monetary amount, use the characters \$. For example: Your financial aid
      award of \$1,000 will be credited on September 1.
      Optional: To insert a data field that personalizes the content:
      1. Place the cursor where you want to insert the personalized data.
      2. Click **Insert Data Fields**.
3. In the left list of the Data Fields pane, select the folder that contains the data field that you want to insert.

4. In the right list of the Data Fields pane, select the data field that you want to insert. The list shows published data fields only.

5. Click Insert.

6. Repeat these steps for each data field that you want to insert.

   An alternate way to insert a data field into the template is to manually enter the data field name with dollar sign ($) delimiters. You must enter the data field name correctly making sure to use the correct case.

7. Click Save.

   If the template includes data fields, preview values are displayed for any data fields that have preview values. Data field names are displayed for data fields that do not have preview values.

8. Click the Preview icon in the editing toolbar.

9. Review the letter content.

10. Close the preview page.

11. If necessary, update and save the content of the letter.

12. Select the Page Settings tab.

13. Optional: Click Edit if you want to change the default margin and page size settings for the letter.

14. Edit the data.

15. Click Save.

16. Optional: If you are ready to make the template available for use, click Publish.

   If the current date is in the valid date range, the template is now active. After the template is published, the Create Message button appears on all pages from which you can create messages, including this page.

17. Optional: If you published the template and want to send the communication now, click Create Message.

   Refer to Create messages for more information.

Create a template for a mobile notification

You can create a template for a mobile notification that you want to send to a population of constituents.

Before you begin

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a template.
- The folder where you want to store the template must already be defined.
About this task

- You can insert data fields (such as name, major, and address) into the template to personalize the mobile notification for each recipient when the communication is processed. Data fields can only be inserted manually by entering the data field name with a dollar sign ($) delimiter. You must be sure to enter the data field name correctly with no typographical errors.
- You can insert URLs into the template.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. Select the Templates tab.
3. Click Add.
4. Enter data about the template on the Add Template page.
   - A unique template name is required.
   - A folder name is required. This is the folder where you want to store the template. The Folder drop-down list shows the folders that you are authorized to access.
   - Select Mobile Notification as the communication method.
   - The Created By field is your Oracle ID and cannot be changed.
   - The Valid From date defaults to the current date. You can change this to a later date if you want.
   - The Valid To date is optional. If blank, the template is valid indefinitely.
   - By default, the template is personal for your use only. You can select the Would you like to share this template? option to share the template with other authorized users. If you share the template, you cannot make it personal again.
5. Click Save.
6. Select the Mobile Notification Content tab.
7. Click the Edit icon.
8. Enter the content of the notification.
   - The Mobile Headline field is required. This is the text that will appear in the pop-up on the recipient's device if you also select Push mobile headline notification.
   - You can copy and paste plain text in the Body field from a text editor, but you cannot apply formatting to the text.
   - If you want to include a clickable link to a URL, enter values both the Destination URL and Destination Label fields. If you enter a value in one of these fields, you must also enter a value in the other; you cannot enter a value for only one.
   - In the Expires section, specify when the notification is to expire, which is when you want the notification to stop appearing on recipients' devices.
   - Select Push mobile headline notification if you want an alert to pop up on recipients' devices. If you do not select this check box, recipients will see the notification only when they access the mobile application.
• Select **User cannot delete notification** if you do not want the user to be able to delete the alert in the mobile application.

9. Click **Save**.
   The **Mobile Notification Content** tab is redisplayed with a preview of your notification.

10. **Optional**: If you are ready to make the template available for use, click **Publish**.
    If the current date is in the valid date range, the template is now active.

11. **Optional**: If you published the template and want to send the communication now, click **Create Message**.
    Refer to **Create messages** on page 62 for more information.

### Edit a template

You can edit the content and format of an existing template.

**About this task**

• If you have an end user role (COMMUNICATIONUSER), you cannot edit a template.
• If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit a template that you created.
• If you have an application administrator role (COMMUNICATIONADMIN), you can edit any template.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. On the **Templates** tab, scroll to or search for the template that you want to edit, and select it.
3. Click **Open**.
4. **Optional**: To edit data about the template:
   a) Click the **Edit** icon.
   b) Edit the data.
   c) Click **Save**.
5. **Optional**: To edit the content and format of the template:
   a) Select the **Email Content** tab, **Letter Content** tab, or the **Mobile Notification Content** tab, as applicable.
   b) Click the **Edit** icon.
   c) Edit the content and format.
   d) Click **Save**.
6. **Optional**: If you published the template and want to send the communication now, click **Create Message**.
Refer to Create messages on page 62 for more information.

Share an existing template

You can share an existing template with other authorized users, if you are the template creator.

About this task

- A new template is personal by default.
- Only the template creator can share a template.
- After a template is shared, you cannot make it personal again.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. On the Templates tab, scroll to or search for the template that you want to share, and select it.
3. Click Open.
4. Click the Edit icon.
5. For the Would you like to share this template? prompt, select the Yes option button.
6. Click Save.

Copy a template

You can copy an existing template and use the copy as a basis for a new template. Templates are not automatically versioned, so copying a template is a good way to preserve multiple versions of a template.

Before you begin

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a template.
- You must have access to the folder where the template is currently stored and to the folder where you want to store the copied template.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. On the Templates tab, scroll to or search for the template that you want to copy, and select it.
3. Click Copy.
4. Replace the default name in the Template Name field with a new, unique template name.
5. Optional: Edit the Description, Folder, Valid From, and Valid To fields.
6. Click Save.
7. Optional: If you want to edit the content of the new template, perform the following sub-steps.
   a) Select the Email Content, Letter Content tab, or the Email Mobile Notification tab, as applicable.
   b) Click the Edit icon.
   c) Edit the message as desired.
   d) Click Save.
8. Optional: If you are ready to make the template available for use, click Publish.
9. Optional: If you published the template and want to send the communication now, click Create Message.
    Refer to Create messages on page 62 for more information.

Delete a template

You can delete a template under certain conditions.

About this task

- If you have an end user role (COMMUNICATIONUSER), you cannot delete any template.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a template if you created the template and if no communications were created from the template.
- If you have an application administrator role (COMMUNICATIONADMIN), you can delete any template if no communications were created from the template.
- No user can delete a template if communications were created from the template.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. On the Templates tab, scroll to or search for the template that you want to delete, and select it.
3. Click Delete.
4. Click Yes on the confirmation message.
Using Data Fields

This section provides information about creating and maintaining data fields that can be used to personalize communications to your constituents.

What is a data field?

A data field defines a business rule that pulls data from Banner for a Banner ID. A data field can be inserted as a placeholder into a communication template. When the associated communication is generated, personalized data from Banner is automatically inserted into the communication for each recipient.

A data field can be used to select any data that is associated with a Banner ID.

A data field can use predefined data field parameters to build a business rule. When a data field references a data field parameter, the user will be prompted to enter the parameter value at the time the communication template is sent.

Example

A data field can be defined to pull a student's major from Banner. The data field can be inserted into a template for an email that will be sent to all graduating students. When the email is generated, the major of each selected student is pulled from Banner and inserted into the student's email.

Status of a data field

The status of a data field is one of the following:

- DEVELOPMENT – The data field is not published and cannot be inserted into a template.
- PRODUCTION – The data field is completely defined, formatted, and published. The data field can be inserted into a template. After a data field is published, its status cannot be changed to DEVELOPMENT.

Search for a data field

You can search for an existing data field by using the full data field name, any part of the data field name, or wildcards.

About this task

You can search for data fields that are stored in the folders that you are authorized to access.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. Select the **Data fields** tab.
3. Enter the search string in the **Search by Data Field Name** field.
   Refer to **Data field search criteria** on page 30 for details about the format of the search string.
4. Press **Enter** to display the search results.

### Data field search criteria

You can use various search criteria to find a data field.

**Note:** A search string is not case sensitive.

**Note:** Special characters in a search string are ignored or removed from the query. For example, the string `sp^&$r` becomes `spr`.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full data field name</td>
<td>Finds the data field with the exact matching name.</td>
</tr>
</tbody>
</table>
| Search string | Finds all data field names that contain the specified search string.  
   **Example:** The search string `name` finds data fields that are named `First_Name` and `Name_Prefix`. |
| % or * wildcard | Finds all data field names that contain the specified characters.  
   **Example:** The following search strings find all data field names that contain the characters `housing`.  
   - `%housing`  
   - `housing%`  
   - `%housing%`  
   - `*housing`  
   - `housing*`  
   - `*housing*` |
| ? or _ wildcards | Finds all data field names that contain the specific number of characters.  
   **Example:** The search strings `city????address` and `city____address` find all data field names that start with `city`, followed by any four characters, followed by `address`. |
View an existing data field

You can view information about an existing data field, such as the folder location, description, and status.

**About this task**

You can view data fields that are stored in the folders that you are authorized to access.

**Procedure**

1. Click *Templates, Data Fields and Parameters* on the Banner Communication Management landing page.
2. Select the *Data fields* tab.
3. Scroll to or search for the data field that you want to view, and select it.
4. Click *Open*.
5. Review information about the data field on the *Overview* tab.
6. Select the *Data Selection* tab to review the business rule that pulls data from Banner.
7. Select the *Formatting* tab to review the formatting string for the data field placeholder.
8. Select the *Field Test* tab to test the data field for a specific Banner ID.

Create a data field

You can create a data field that defines a business rule for pulling personalized data from Banner for a Banner ID. You can insert predefined data field parameters when building the business rule.

**Before you begin**

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a data field. The folder where you want to store the data field must already be defined.

**About this task**

A data field can be inserted as a placeholder into a communication template. When the communication template is sent, you will be prompted to enter a value for the data field parameter(s). When the associated communication is generated, personalized data from Banner is automatically inserted into the communication for each recipient.

**Procedure**

1. Click *Templates, Data Fields and Parameters* on the Banner Communication Management landing page.
2. Select the *Data fields* tab.
3. Click **Add**.

4. Enter data about the data field on the **Add Field** page.
   - A unique field name is required. Spaces and special characters are not allowed.
   - A folder name is required. This is the folder where you want to store the data field. The **Folder Name** drop-down list shows the folders that you are authorized to access.
   - The optional **Preview Value** field is the value that is displayed when you preview the data field in a template. This allows you to check spacing and format.

5. Click **Save**.

6. Enter the business rule as follows:
   a) Select the **Data Selection** tab.
   b) Click the **Edit** icon.
   c) **Optional**: If the SQL statement is intended to return a list of values, select the **Output returns more than one row** check box.
   d) Enter or paste a query statement into the **SQL Statement** field. This is the business rule that pulls data from Banner.
      - You cannot use a semicolon or asterisk.
      - You can use these operators:
        - UNION [ALL]
        - INTERSECT
        - MINUS
      - You must include a SELECT statement.
      - You must include a :pidm parameter in the **WHERE** clause.
      - You cannot use these reserved words:
        - ALTER
        - CREATE
        - DATABASE
        - DELETE
        - DROP
        - EXECUTE
        - INSERT
        - INSERT INTO
        - MERGE
        - UPDATE
      - You must have security access to the Banner table that you want to query.
      - You can use pre-defined data field parameters to build your SQL statement.
Using Data Fields

e) To use a pre-defined data field parameter to build your SQL statement, place your cursor at the location where you want to include the data field parameter and click **Insert Data Field Parameter**. Select the data field parameter you want to use. The data field parameter gets inserted into your SQL statement at the cursor location you have specified.

f) Click **Validate** to check the syntax of the SQL statement.

g) Click **Save**.

7. Format the data field as follows:
   a) Select the **Formatting** tab.
   b) Click the **Edit** icon.
   c) Enter a string to format the data field.
      Refer to **Data field formatting** on page 33 for details about entering the format string.
   d) Click **Save**.

8. Test the data field as follows:
   a) Select the **Field Test** tab.
   b) Enter the Banner ID that you want to test.
   c) If the data field references data field parameters, enter a value(s) for the data field parameter(s).
   d) Click **Test**.
      Personalized data for the Banner ID displays.
   e) Ensure that the correct test results are returned for the Banner ID.
      For example, if you are testing a data field that defines the primary email address, the test results should display the email address for the Banner ID that you entered.
   f) **Optional**: If you want to reset the value of the Banner ID, click **Reset** and repeat the test.

9. **Optional**: If you are ready to publish the data field so it can be used in a template, click **Publish**.
   • Before a data field can be published, it must have a name, folder, and formatting.
   • Publishing a data field changes the status of the data field from DEVELOPMENT to PRODUCTION. After you publish a data field, you cannot change the status back to DEVELOPMENT.

**Data field formatting**

Before you can publish a data field, you must define the format of the data field placeholder. The placeholder is formatted on the **Communication Management > Data Fields > Formatting** tab. After the placeholder is formatted and published, the data field can be inserted into templates.

Placeholder names must meet the following requirements:
• No spaces are allowed.
• Underscores can be used to improve readability.
• A dollar sign ($) must be used as a delimiter before and after the name. If you need to use the $ symbol outside the delimiters, use the symbols \$.

Examples of placeholder names are $today$ and $hold_status$.

**Formatting for a single returned value**

A data field can return a single value from the database. In this case, the formatting string refers to a column name that is used in the data field’s SQL statement.

The following example illustrates a simple substitution for a single returned value:

```sql
select spbpers_name_suffix from spbpers
where spbpers_pidm = :pidm
```

This SQL statement returns a single value with the column name spbpers_name_suffix. The formatting string is $spbpers_name_suffix$.

**SQL date formatting**

Oracle PL/SQL functions for formatting dates can be applied within the SQL statement:

```sql
select to_char(sysdate,'Month DD, YYYY') today from dual where :pidm = :pidm
```

The `to_char()` function is used to present the full month name and two-digit day, followed by a comma and the four-digit year. The column name is `today`. The formatting string is $today$.

**Mailing address formatting**

There is no default mailing address resolution for recipients of a letter communication. When creating a letter template, you can use the rich functionality of data fields to populate the To field with a letter mailing address data field.

The following example shows the SQL statement for a data field named `Mailing_Address`:

```sql
select spraddr_street_line1, spraddr_city, spraddr_stat_code, spraddr_zip
from spraddr where spraddr_pidm = :pidm and SPRADDR_ATYP_CODE = 'MA'
```

The retrieved column names are:

- spraddr_street_line1
- spraddr_city
- spraddr_stat_code
- spraddr_zip

The formatting string is $spraddr_street_line1$,
$spraddr_city$, $spraddr_stat_code$, $spraddr_zip$.

An example output is:

1 One Street,
Malvern, PA 19355.
You can create additional mailing address related data fields to satisfy different uses and business rules.

**Email address formatting**

There is no default email address resolution for recipients of an email communication. When creating an email template, you can use the rich functionality of data fields to populate the **To** field with a preferred email data field.

The following example shows the SQL statement for a data field named `Email_Preferred`:

```sql
select GOREMAL_EMAIL_address from goremal
where goremal_pidm = :pidm and GOREMAL_PREFERRED_IND = 'Y'
```

The retrieved column name is `goremal_email_address`. The formatting string is `$goremal_email_address$`. An example output is `jsmith@ellucian.edu`.

You can create additional email address related data fields to satisfy different uses and business rules.

**Formatting for a returned list of values**

If a data field is intended to return a small list of values, the formatting string consists of structured text with placeholders that refer to column names in the data field's SQL statement.

**Note:** Do not define SQL statements that return more than 50 values. The number of returned values must be controlled to handle performance levels, memory issues, and inherit limitations imposed by the email server.

You must select the **Output returns more than one row** check box on the **Communication Management > Data Fields > Data Selection** tab. This alerts the formatter to treat each placeholder as a list of values.

A special syntax is used to format a data field that returns a list of values:

```plaintext
$list_placeholder1, list_placeholder2 : { placeholder1, placeholder2 | $placeholder1$: $placeholder2$}
```

The list semantics appear as a simple text function, beginning and ending with the $ delimiter. There are two parts to the syntax:

1. **Before the colon** – This part includes all SQL column placeholders, separated by commas, that will be passed as input. These placeholders are treated as lists.
2. **After the colon** – This part associates a new placeholder name, which refers to a single value in the list. Static and placeholder content is marked up between the braces `{ }`. The pipe symbol `|` separates the structured list content from the new placeholder names.

For example, consider the following SQL statement for a data field:

```sql
select stvhldd_desc description, sprhold_reason reason
from sprhold, stvhldd
where stvhldd_code = sprhold_hldd_code
and sprhold_from_date <= SYSDATE
and sprhold_to_date > SYSDATE
```
and sprhold_pidm = :pidm

This SQL statement outputs two columns: description and reason. These columns can be used as placeholders in the following formatting text:

```html
<ul>
  <li>$description, reason: { d,r}</li>
</ul>
```

The following output is rendered from HTML:

- Library Fines **, Overdue books
- Parking Fine, Unpaid Parking ticket

## Edit a data field

You can edit the overview information, business rule, and formatting for an existing data field.

### About this task

- If you have an end user role (COMMUNICATIONUSER), you cannot edit a data field.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit a data field that you created.
- If you have an application administrator role (COMMUNICATIONADMIN), you can edit any data field.
- If the data field has a status of PRODUCTION, you cannot edit the name or business rule for a data field as you can potentially affect communications that are currently processing.

### Procedure

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Data fields** tab.
3. Scroll to or search for the data field that you want to edit, and select it.
4. Click **Open**.
5. **Optional:** To edit overview information:
   a) Click the **Edit** icon on the **Overview** tab.
   b) Edit the data.
   c) Click **Save**.
6. **Optional:** To edit the business rule:
   a) Select the **Data Selection** tab.
   b) Click the **Edit** icon.
   c) Edit the SQL statement.
   d) Click **Validate** to check the syntax of the SQL statement.
   e) When the statement is valid, click **Save**.

7. **Optional:** To edit the formatting string:
   a) Select the **Formatting** tab.
   b) Click **Save**.
   c) Edit the formatting string.
   d) Click **Save**.

8. To test the data field:
   a) Select the **Field Test** tab.
   b) Enter the Banner ID that you want to test.
   c) Click **Test**.
      Personalized data for the Banner ID displays.
   d) Ensure that the correct test results are returned for the Banner ID.

9. **Optional:** If you are ready to publish the data field so it can be used in a template, click **Publish**.
   - Before a data field can be published, it must have a name, folder, and formatting.
   - Publishing a data field changes the status of the data field from **DEVELOPMENT** to **PRODUCTION**. After you publish a data field, you cannot change the status back to **DEVELOPMENT**.

**Copy a data field**

You can copy an existing data field and use the copy as a basis for a new data field. Data fields are not automatically versioned, so copying a data field is a good way to preserve multiple versions of a data field.

**Before you begin**
- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a data field.
- You must have access to the folder where the data field is currently stored and to the folder where you want to store the copied data field.
**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Data fields** tab.
3. Scroll to or search for the data field that you want to copy, and select it.
4. Click **Copy**.
5. Replace the default name in the **Field Name** field with a new, unique data field name. Spaces and special characters are not allowed.
6. **Optional:** Edit the **Description**, **Folder**, and **Preview Value** fields.
7. Click **Save**.
8. **Optional:** If you want to edit the business rule or formatting for the copied data field, use the steps in **Edit a data field** on page 36.

---

**Test a data field**

You can test a data field to make sure it pulls data from Banner correctly. For example, you can test a data field that pulls the primary email address by entering a valid Banner ID and verifying that you get the primary email address for the Banner ID.

**About this task**

You can test data fields that are stored in the folders that you are authorized to access.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Data fields** tab.
3. Scroll to or search for the data field that you want to test, and select it.
4. Click **Open**.
5. Select the **Field Test** tab.
6. Click the **Edit** icon.
7. Enter the Banner ID that you want to test.
8. If the data field references a data field parameter(s), enter a value(s) for the data field parameter(s).
9. Click **Test**.
10. Ensure that the correct test results are returned for the Banner ID.
Delete a data field

You can delete a data field under certain conditions.

About this task

• If you have an end user role (COMMUNICATIONUSER), you cannot delete any data field.
• If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a data field if you created the data field and if the data field is not published yet.
• If you have an application administrator role (COMMUNICATIONADMIN), you can delete any data field that is not published yet.
• No user can delete a published data field.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. Select the Data fields tab.
3. Scroll to or search for the data field that you want to delete, and select it.
4. Click Delete.
5. Click Yes on the confirmation message.
Using Data Field Parameters

This section provides information about creating data field parameters that will allow flexibility and re-use of data fields to personalize communications to your constituents.

What is a data field parameter?

A data field parameter allows flexibility and reuse of a data field. The values of a data field parameter define what specific data will get selected from the Banner database for a Banner ID when the data field is calculated.

A data field parameter can be inserted as a placeholder into the business rule of a data field. When the associated data field is used in a template, and a message is created using the template, you will be prompted to enter a value for the data field parameter. When the communication is generated, the data field parameter value is evaluated, and the specific personalized data from Banner is automatically inserted into each data field used in the communication for each recipient.

Example

A data field parameter can be defined for term_code. When creating a business rule for a data field that references a term_code, the data field parameter can be inserted as a placeholder.

In the case for a data field that will get the Primary_Advisor for a particular term for a student. The term_code data field parameter is referenced in the business rule. The data field is used in an email template that will be sent to students informing them of their current advisor. When a message is created using the email template, you will be prompted to provide the term_code value. When the email is generated, the primary advisor for each selected student for the entered term code is pulled from Banner and inserted into the student's email.

Data Field Parameter Type

A data field parameter can be defined as having one of the following types:

- Text – The entered value for the data field parameter must be text
- Number – The entered value for the data field parameter must be a number
- Date – The entered value for the data field parameter must be a date

Note: You cannot define a Data Field Parameter with the name pidm, as it is reserved for mandatory inclusion as a parameter in the WHERE clause for every Data Field business rule.
Search for a data field parameter

You can search for an existing data field parameter by using the full data field parameter name, any part of the data field parameter name, or wildcards.

About this task

You can search for data field parameters that are stored in the folders that you are authorized to access.

Procedure

1. Click Templates, Data Fields and Parameters on the Banner Communication Management landing page.
2. Select the Parameters tab.
3. Enter the search string in the Search by Parameter Name field.
   Refer to Data field parameter search criteria on page 41 for details about the format of the search string.
4. Press Enter to display the search results.

Data field parameter search criteria

You can use various search criteria to find a data field parameter.

Note:  A search string is not case sensitive.

Note:  Special characters in a search string are ignored or removed from the query. For example, the string sp^&$r becomes spr.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full parameter name</td>
<td>Finds the parameters with the exact matching name.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all parameter names that contain the specified search string.</td>
</tr>
<tr>
<td>Example: The search string code finds parameters that are named Term_Code and Letter_Code.</td>
<td></td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all parameter names that contain the specified characters.</td>
</tr>
<tr>
<td>Example: The following search strings find all parameter names that contain the characters housing.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• %housing</td>
</tr>
<tr>
<td></td>
<td>• housing%</td>
</tr>
<tr>
<td></td>
<td>• %housing%</td>
</tr>
</tbody>
</table>
### Search Criteria

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
</table>
|                 | • *housing*
|                 | • housing* |
|                 | • *housing* |
| ? or _ wildcards| Finds all parameter names that contain the specific number of characters. |
|                 | The search strings `city????address` and `city address` find all parameter names that start with `city`, followed by any four characters, followed by `address`. |

### View an existing data field parameter

You can view information about an existing data field parameter, such as the description and type.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Parameters** tab.
3. Scroll to or search for the parameter that you want to view, and select it.
4. Click **Open**.
5. Review information about the parameter.

### Create a data field parameter

You can create a data field parameter that defines the specific data to select from the Banner database for a Banner ID.

**Before you begin**

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a data field parameter.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Parameters** tab.
3. Click **Add**.
4. Enter data about the parameter on the **Add Parameter** page.
• A unique parameter name is required. Spaces and special characters are not allowed.
• A title required. This will be displayed in the create message page when the data field parameter is presented to the user to enter a value.
• A Type is required. The **Type** drop-down list shows the available types.

5. Click **Save**.

### Edit a data field parameter

You can edit the parameter name, title and type of a data field parameter.

**About this task**

• If you have an end user role (COMMUNICATIONUSER), you cannot edit a data field parameter.
• If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit a data field parameter that you created.
• If you have an application administrator role (COMMUNICATIONADMIN), you can edit any data field parameter.
• If a parameter is being used in a data field, you can only edit the title for a parameter.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Parameters** tab.
3. Scroll to or search for the parameter that you want to edit, and select it.
4. Click **Open**.
5. Edit the data.
6. Click **Save**.

### Copy a data field parameter

You can copy an existing parameter and use the copy as a basis for a new parameter.

**Before you begin**

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a parameter.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Select the **Parameters** tab.
3. Scroll to or search for the parameter that you want to copy, and select it.
4. Click **Copy**.
5. Replace the default name in the **Parameter Name** field with a new, unique data field parameter name.
   Spaces and special characters are not allowed.
6. Optional: Edit the **Title** and **Type** fields.
7. Click **Save**.

**Delete a data field parameter**

You can delete a parameter under certain conditions.

**About this task**

- If you have an end user role (COMMUNICATIONUSER), you cannot delete any data field parameter.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a data field parameter if you created the parameter and if the data field parameter is not being used by a data field.
- If you have an application administrator role (COMMUNICATIONADMIN), you can delete any data field parameter that is not being used by a data field.
- No user can delete a parameter that is being used by a data field.

**Procedure**

1. Click **Templates, Data Fields and Parameters** on the Banner Communication Management landing page.
2. Click on the **Parameters** tab.
3. Scroll to or search for the parameter that you want to delete, and select it.
4. Click **Delete**.
5. Click **Yes** on the confirmation message.
Using Queries

This section provides information about querying Banner to identify the constituents who should receive a communication.

What is a query?

A query is a set of criteria that selects a group of constituents in Banner. The resulting group of constituents is called a population. You can use a query to create a population of constituents who should receive a communication.

For example, you can use queries to create the following groups of constituents in Banner:

- Out-of-state students
- Incoming freshmen students
- Donors with Illinois addresses
- Full time employees
- Active Holds

A new population of constituents is created each time a query is run, whether the query is run by the same user or by a different user.

Query scenarios

Various administrative users and departments at your institution can use queries to select the constituents who should receive a communication.

Scenario 1 – Recruiting

A recruiter wants to invite prospective students to an open house that is targeted for specific degree programs. The recruiter creates, saves, and runs a query that identifies prospects in the specific degree programs for the fall term. The recruiter then sends an email invitation to the identified prospects. The recruiter can also use the saved query to send reminder emails at a later date.

Scenario 2 – Advising

An advisor wants to invite next term's incoming students to the new student orientation session. The advisor creates a query for students with a student type "New First Time" or "First Time Freshman" and are classified as "First Year" for the next term. The advisor saves and runs the query. The advisor then sends an email invitation to the identified incoming students. The advisor can also use the saved query to send reminder emails at a later date.
Scenario 3 – Financial Aid
A financial aid officer wants to send a schedule of financial aid workshops to the following financial aid applicants for the next financial aid year:

- Applicants who are registered for classes in the current term and have not met the Pace of Satisfactory Academic Progress standards
- New applicants whose GPA is lower than 2.0

The financial aid officer creates, saves, and runs a query that identifies the two groups of applicants. The financial aid officer then sends a workshop schedule to the identified applicants.

Scenario 4 – Human Resources
The HR manager wants all project managers to attend the webinar "Building and Leading Successful Project Teams" on November 14. The HR manager creates, saves, and runs a query that identifies all project managers at the institution. The HR manager then sends an email, which includes the date of the webinar and a link to the webinar so interested employees can register, to the project managers.

Scenario 5 – Active Holds
The bursar’s office wants to send a notification to students to take care of active holds on their accounts. The bursar's office representative creates, saves, and runs a query that identifies all students who have active holds on their accounts for the current semester. The bursar's office representative then sends a mobile notification, which includes a URL, to the students notifying them to log in to their accounts and address the holds.

Search for a query

You can search for an existing query by using the full query name, any part of the query name, or wildcards.

About this task
You can search for queries that are stored in the folders that you are authorized to access.

Procedure
1. Click Queries on the Banner Communication Management landing page.
2. Enter the search string in the Search by Query Name field.
   Refer to Query search criteria on page 47 for details about the format of the search string.
3. Press Enter to display the search results.
Query search criteria

You can use various search criteria to find a query.

**Note:** A search string is not case sensitive.

**Note:** Special characters in a search string are ignored or removed from the query. For example, the string `sp^&$r` becomes `spr`.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full query name</td>
<td>Finds the query with the exact matching name.</td>
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<tr>
<td>Search string</td>
<td>Finds all query names that contain the specified search string.</td>
</tr>
<tr>
<td></td>
<td>Example: The search string list finds queries that are named Class List and List of Athletes.</td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all query names that contain the specified characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The following search strings find all query names that contain the characters student.</td>
</tr>
<tr>
<td></td>
<td>• %student</td>
</tr>
<tr>
<td></td>
<td>• student%</td>
</tr>
<tr>
<td></td>
<td>• %student%</td>
</tr>
<tr>
<td></td>
<td>• *student</td>
</tr>
<tr>
<td></td>
<td>• student*</td>
</tr>
<tr>
<td></td>
<td>• <em>student</em></td>
</tr>
<tr>
<td>? or _ wildcards</td>
<td>Finds all query names that contain the specific number of characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The search strings housing????assignments and housing__assignments find all query names that start with housing, followed by any four characters, followed by assignments.</td>
</tr>
</tbody>
</table>

View an existing query

You can view the name, description, folder name, creator, status, query type, and query statement for an existing query.

**About this task**

You can view queries that are stored in the folders that you are authorized to access.
Procedure
1. Click Queries on the Banner Communication Management landing page.
2. Scroll to or search for the query that you want to view, and select it.
3. Click Open.
4. Review information about the query on the Details page.
5. If the query has more than one version, use the View Versions drop-down to display the details for that version.

Create a query

You can create a query to select a group of constituents in Banner that meet a set of selection criteria.

Before you begin
• You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a query.
• The folder where you want to store the query must already be defined.

Procedure
1. Click Queries on the Banner Communication Management landing page.
2. Click Add.
3. Enter data about the query.
   • A unique query name is required.
   • A folder name is required. This is the folder where you want to store the query. The Folder Name drop-down list shows the folders that you are authorized to access.
   • The Creator field is your Oracle ID and cannot be changed.
4. Select the type of query:
   • SQL Statement – a query defined in terms of a SQL statement that references the Banner database schema.
   • Population Selection Extract – a reference to an existing population selection extraction.
   • For the type SQL Statement, enter or paste a query statement into the Query Statement field. This statement specifies the criteria that select a group of constituents in Banner.
   • You cannot use a semicolon or asterisk.
   • The query statement must select PIDMs.
   • You must include a SELECT statement.
   • You cannot use these reserved words:
     – ALTER
Using Queries

- CREATE
- DATABASE
- DELETE
- DROP
- EXECUTE
- INSERT
- INSERT INTO
- MERGE
- UPDATE
- ORDER BY

- You must have security access to the Banner table that you want to query.

5. Click Validate to check the syntax of the SQL statement. Validation results are displayed in the Validation Results field.

6. For the type Population Selection Extract, you must specify the Application and the Selection ID.
   a) Enter the Application Name or click on the search icon button to choose an application from a searchable list.
   b) Enter the Selection ID (if unique) or click on the search icon button to choose between a unique Selection ID, Creator ID, and User ID.
   c) The Creator ID and User ID should populate based on the selection of the Selection ID.
   d) A count will also display to show the current size of the population selection extract.

Publish a query

Publishing a query marks the current state of the query as being suitable for generating populations.

Procedure

1. Verify the status of the query is Development.
2. Click Publish.
3. Verify the status of the query changed to Production.
Generate population

You can run a published query against Banner to generate a population of constituents who match the query criteria.

About this task
You can run queries that are stored in the folders that you are authorized to access.

Procedure
1. Click Queries on the Banner Communication Management landing page.
2. Scroll to or search for the query that you want to run, and select it.
3. Click Generate Population.
   
   **Note:** If the Generate Population button is not enabled, the query was likely never published.
4. Specify the following fields:
   - Population Name
   - Description
   - Notice the Folder Name is inherited from the selected query
   - **Advanced:** Choose Always use the latest published version of the query if you would like the population’s query to be updated with published edits to the query in the event the population is regenerated. The default is to always use the published query at the time of creation when doing population regenerations.
5. Click Generate.
   
   You will then be routed to the new population detail page while the application is processing the query.

Edit a query

You can edit an existing query.

About this task
If the query has been previously published, a new version of the query will be saved without any adverse effects to existing populations.

- If you have an end user role (COMMUNICATIONUSER), you cannot edit a query.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit a query that you created.
- If you have an application administrator role (COMMUNICATIONADMIN), you can edit any query.
Procedure
1. Click **Queries** on the Banner Communication Management landing page.
2. Scroll to or search for the query that you want to edit, and select it.
3. Click **Open**.
4. Click the **Edit** icon.
5. Edit the data.
6. Click **Save**.

**Note:**
Every time a query is edited and published, a read only copy of the query criteria is saved to the side. This protects existing communication jobs from future edits of the query depending on the advanced option chosen when generating the population. It also allows the end user to make changes to a query by not locking it when used in existing populations.

Versions of queries are always tracked by their published date. When viewing a query, you will see a **View Versions** drop-down if the population has been previously published. The current indicator represents the most recent edition of the query which may or may not have been published yet.

Copy a query

You can copy an existing query and use the copy as a basis for a new query.

**Before you begin**
- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a query.
- You must have access to the folder where the query is currently stored and to the folder where you want to store the copied query.

**Procedure**
1. Click **Queries** on the Banner Communication Management landing page.
2. Scroll to and search for the query that you want to copy, and select it.
3. Click **Copy**.
4. Replace the default name in the **Query Name** field with a new, unique query name.
5. **Optional:** Edit the **Description**, **Folder Name**, and **Query Statement** fields.
   The **Creator** field cannot be changed.
6. Click **Save**.
   The query is saved with your Oracle ID in the **Creator** field.
Copy a displayed query version

You can copy an existing query version and use the copy as a basis for a new query. Queries are not automatically versioned, so copying a query is a good way to preserve multiple versions of a query.

Before you begin

• You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a query.
• You must have access to the folder where the query is currently stored and to the folder where you want to store the copied query.

Procedure

1. Click **Queries** on the Banner Communication Management landing page.
2. Scroll to and search for the query that you want to copy, and select it.
3. Choose the specific query version under the **View Versions** drop-down.
4. Click **Copy Displayed Version** under the (…) menu.
5. Replace the default name in the **Query Name** field with a new, unique query name.
6. Optional: Edit the **Description**, **Folder Name**, and **Query Statement** fields. The **Creator** field cannot be changed.
7. Click **Save**. The query is saved with your Oracle ID in the **Creator** field.

Delete a query

You can delete a query under certain conditions.

About this task

• If you have an end user role (COMMUNICATIONUSER), you cannot delete any query.
• If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a query if you created the query and if no populations are associated with the query.
• If you have an application administrator role (COMMUNICATIONADMIN), you can delete any query if no populations are associated with the query.
• No user can delete a query if populations are associated with the query.

Procedure

1. Click **Queries** on the Banner Communication Management landing page.
2. Scroll to or search for the query that you want to delete, and select it.
3. Click **Delete**.
4. Click **Yes** on the confirmation message.

**Delete a displayed query version**

You can delete a published query version under certain conditions.

**About this task**

- If you have an end user role (COMMUNICATIONUSER), you cannot delete any query.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a query if you created the query and if no populations are associated with the query.
- If you have an application administrator role (COMMUNICATIONADMIN), you can delete any query if no populations are associated with the query.
- No user can delete a query if populations are associated with the query.

**Procedure**

1. Click **Queries** on the Banner Communication Management landing page.
2. Scroll to or search for the query that you want to delete, and select it.
3. Choose the specific query version under the **View Versions** drop-down.
4. Click **Delete Displayed Version**.
5. Click **Yes** on the confirmation message.
Using Populations

This section provides information about populations and how they are used to send communications to your constituents.

What is a population?

A population is a defined group of individual profiles used as the target audience for a particular communication. A population consists of a number of constituents that share one or more common attributes.

You create a population when you generate a query against the Banner database. A population contains the constituents who match the selection criteria in the query. You can also create a population by importing profiles.

You can run queries to create populations that contain following groups of constituents:

- Out-of-state students
- Incoming freshmen students
- Donors with Illinois addresses
- Full time employees

After you generate a query and create a population from a query, you can send a communication to constituents in the population. A new population is created every time a query is run, whether the query is run by the same user or by a different user.

You can also create a manual population and add profiles by searching for a constituent or by importing a csv, xls, or xlsx file. For example, you can create a population that contains the following groups of constituents:

- Deans’ List students
- Financial Aid Award students
- Employees with vacation remaining

After you manually create a population, you can send a communication to the constituents in the population. You can also add profiles to a query generated population list. You own the population that you create.

Populations

When you first click Populations on the Communication Management landing page, a listing of all your populations displays. Each row displays a summary of a population. From here you can:

- Search for a population
- Add a population
- Open Population Details
- Delete a population
Administrative user can select the **View All** check box to show all populations by user.

## Search for a population

You can search for an existing population by using the full population name, any part of the population name, or wildcards.

### About this task

You can search for populations that are stored in the folders that you are authorized to access.

### Procedure

1. Click **Populations** on the Banner Communication Management landing page.
2. Enter the search string in the **Search By Population Name** field.
   
   Refer to **Population search criteria** on page 55 for details about the format of the search string.
3. Press **Enter** to display the search results.
4. If you want to send a communication to a population now, click **Create Message**.
   
   Refer to **Create messages** on page 62 for more information.

### Population search criteria

You can use various search criteria to find a population.

**Note:** A search string is not case sensitive.

**Note:** Special characters in a search string are ignored or removed from the query. For example, the string `sp^&$r` becomes `spr`.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full population name</td>
<td>Finds the population with the exact matching name.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all population names that contain the specified search string.</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> The search string <code>list</code> finds populations that are named Class List and List of Athletes.</td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all population names that contain the specified characters.</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> The following search strings find all population names that contain the characters <code>student</code>.</td>
</tr>
<tr>
<td></td>
<td>• %student</td>
</tr>
<tr>
<td></td>
<td>• student%</td>
</tr>
</tbody>
</table>
### Search Criteria

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>%student%</td>
<td>Finds all population names that contain the specific number of characters.</td>
</tr>
<tr>
<td>*student</td>
<td></td>
</tr>
<tr>
<td>student*</td>
<td></td>
</tr>
<tr>
<td><em>student</em></td>
<td></td>
</tr>
<tr>
<td>? or _ wildcards</td>
<td>Finds all population names that contain the specific number of characters.</td>
</tr>
</tbody>
</table>

**Example:** The search strings `senior????students` and `senior____students` find all population names that start with `senior`, followed by any four characters, followed by `students`.

---

### View population details

You can view population overview information and a list of constituents in the population from the last time the population was generated.

**About this task**

You can view populations that are stored in the folders that you are authorized to access.

**Procedure**

1. Click **Populations** on the Banner Communication Management landing page.
   The system displays the **Populations** page listing all your populations. If you are an administrative user, you can select the **View All** check box which will show all populations by user.
2. Scroll to or search for the population that you want to view, and select it.
3. Click **Open**.
4. Review the **Overview** section.
   This section contains summary information such as the name of the population, description, folder name, status, total population results [count], creator, and created date.

   Generating a population from a query is performed by a background process. The status describes if the generation is still processing or if it has completed and the population is available for use. After the Status is **Available**, you can inspect the results by expanding the **Total Population Results** section.
5. Review the **Query Information** section.
   This section is visible when you generate a population from a query. Information includes the specific query name and version (used by the generation), query results, generated date, and the rule for applying the query for future generations.
6. Review the **Manually Added Profiles** section.
This section contains manually included profiles. You can add profiles from a file or add a profile by searching and adding them to the list. You can also remove a profile or remove all profiles in this section. After you have added profiles, you can review the list of manually included constituents.

If you want to filter the list of constituents in the Manually Added Profiles section, enter the full or partial constituent name or ID (with or without wildcards) in the Search by Name or ID field.

7. Review the Total Population Results section.
This section contains a list of all the constituents in the population. Profiles generated from the query and profiles from the manual include list are displayed in this section. You can review the total list of constituents in the population.

If you want to filter the list of constituents in the Results section, enter the full or partial constituent name or ID (with or without wildcards) in the Search by Name or ID field.

8. If you want to send a communication to a population now, click Create Message. Refer to Create messages on page 62 for more information. If you want to rerun the underlying query, you can click Regenerate Population.

Create a population

You can create a population by determining the profiles you want to include. You can also create a population when you run a published query against Banner to generate a population of constituents who match the query criteria. Refer to the section Generate population on page 50 to create a population by generating a query.

Before you begin

• You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a population.
• You must ensure that the folder where you want to store the population is already defined.

Procedure

1. Click Populations on the Banner Communication Management landing page. The system displays the Populations page listing all of your populations. If you are an administrative user, you can select the View All check box which shows all populations by user.
2. Click Add.
3. Enter data about the population.
   • A unique population name is required.
   • A folder name is required. This is the folder where you want to store the query. The Folder Name drop-down list shows the folders that you are authorized to access.
4. Click Save.
Results
The population saves and the **Overview** and **Manually Added Profiles** sections displays. The **Total Population Result** section closes.

Manually Added Profiles

You can determine the constituents to include in a population by importing a file of profiles or by searching for and including a profile(s).

Before you begin

- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to add profiles to a population.
- The folder where you want to store the population must already be defined.
- The file to be used (csv, xls, or xlsx) must have two lines at a minimum.

  **Note:** Currently, IE has a limitation to only accept csv type files.

About this task
You can import files from your desktop. File types supported include csv, xls, and xlsx file types.

Procedure

1. Click **Populations** on the Banner Communication Management landing page.
   The system displays the **Populations** page listing all of your populations. If you are an administrative user, you can select the **View All** check box which will show all populations by user.
2. Scroll to or search for the population to which you want to manually add profiles, and select it.
3. Click **Open**.
   **Overview** section displays. The **Manually Added Profiles** and **Total Population Results** sections are available.
4. Open the **Manually Added Profiles** section by clicking on the arrow.
   - Click **Add from File** to add profiles from a csv, xls, or xlsx file.
   - Click **Add** to search for and add a single constituent.
5. To add profiles from a file:
   a) Click **Browse** to navigate and select a file.
      The name of the selected file will be displayed in the field.
   b) Click **Continue**.
   c) Preview the file.
      If your file does not include a header row, clear the **My Spreadsheet Has Headers** check box.
d) Map the column that corresponds to the Banner ID field, by selecting a column from the drop-down or by selecting the column in the Preview section. You must identify the Banner ID column to continue.

e) Click Import.
   - A progress bar of the import will display.
   - When the import is complete, a window with results will display.
   - The results will display the number of profiles added and the number of entries not added to the manually added profiles section because they were duplicates, already in the population or not found in Banner.

f) Click Close.
The Manually Added Profiles will display the records that were successfully imported.

6. To add a single profile:
   a) Search for a constituent by entering name or ID. Enter at least 3 characters to search for a constituent.
   b) Select the constituent you want to add and click Add. Manually Added Profiles will display the record that you added.
   c) Optional: If you want to filter the list of constituents in the Manually Added Profiles, enter the full or partial constituent name or ID (with or without wildcards) in the Search by Name or ID field.

7. If you want to send a communication to a population now, click Create Message.

   Note: The count for Total Population Results for a population is the sum of the unique profiles in the list generated from the query and in the manually added profiles list. Adding profiles to a population manually will add profiles to the Manually Added Profiles section, but the count for Total Population Results may not increase because the profiles are already in the query results section.

Regenerate population

You can regenerate a population to update the results of the population.

About this task
   • Useful for updating the query results of matching constituents.
   • Can update the published query version associated with this population depending on the advanced option used to create the population.
   • Does not affect the manual include list.
   • Does not affect existing communication jobs.
   • Generation is performed as background process. The status indicates if the generation has completed.
Procedure

1. Click Populations on the Banner Communication Management landing page. 
   The system displays the Populations page listing all of your populations.
   If you are an administrative user, you can select the View All check box which will show all populations by user.
2. Scroll to or search for the population that you want to view, and select it.
3. Click Open.
4. Click Regenerate Population.

Delete a population

You can delete a population under certain conditions.

About this task

- If you have an end user role (COMMUNICATIONUSER), you cannot delete any population.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete a population if you created the population and if no communications were sent to the population.
- If you have an application administrator role (COMMUNICATIONADMIN), you can delete any population if no communications were sent to the population.
- No user can delete a population if communications were sent to the population.

Procedure

1. Click Populations on the Banner Communication Management landing page. 
   The system displays the Populations page listing all of your populations.
   If you are an administrative user, you can select the View All check box which will show all populations by user.
2. Scroll to or search for the population that you want to delete, and select it.
3. Click Delete.
4. Click Yes on the confirmation message.
What are the building blocks of a communication?

In Banner Communication Management, a communication is based on a template, data fields (optional), and a population that is created with a query. These pieces must be in place before you send a communication.

**Template**
A template provides the format and content of the communication, such as an email that will be sent to all graduating students, or a letter that will be sent to an alumnus thanking them for their support, or a mobile notification that will be sent to students to update their personal information.

**Data fields**
A template can optionally include data fields that personalize the communication for each recipient. A data field pulls personalized data from Banner and inserts that data into the communication. For example, an email template can include data fields for the recipient's name and anticipated graduation date. When the email is generated, the name and graduation date are pulled from Banner and automatically inserted into each recipient's email.

**Data Field Parameters**
A data field parameter allows flexibility and reuse of a data field. The values of a data field parameter define what specific data will be selected from the Banner database for a Banner ID when the data field is calculated.

For example, an email template can include data fields for the Total Fall Award and Total Spring Award for an Aid Year for a constituent. When the email is generated, the Aid Year data field parameter is presented to the user for a value. The Total Fall Award and Total Spring Award for the entered aid year is pulled from Banner and automatically inserted into each recipient's email.

**Query**
A query is a set of criteria that selects a group of constituents in Banner. For example, a query can select all students who are expected to graduate at the end of a specific term.

**Population**
When you run a query against the Banner database, you get a list of constituents who match the selection criteria in the query. This group of constituents is called a population. For example, a population can include all students who are expected to graduate at the end of a specific term. A communication can be sent to a population of recipients.
Organization
The organization describes the sender of the communication. It may also specify specific configuration for sending communication over a specific communication channel (for example, an email sender account and email server host).

Create messages

You can create a message from an existing population, template, or the communication jobs page.

Before you begin
• The organization for which you want to send the message must already be defined.
• A template with the content of the communication must be created.
• The target population must exist already.

About this task
• During the send process for communications, the reply-to and sender details (email addresses or mobile notification server information, as applicable) default from values that are set up by your application administrator.
• If the template includes data fields, each recipient's message is customized with personalized data that is pulled from Banner during the send process.

Procedure
1. Navigate to the Open Population, Open Template, or Communication Job page.
2. Click Create Message.
3. Enter data about the message on the Create Message page.
   • A descriptive name for the communication job is required.
   • The Organization drop down list shows organizations that you are authorized to access.
   • The Population drop down list shows populations that you are authorized to access.
   • The Template drop down list shows templates that you are authorized to access.
   • If the template contains data fields that require parameters, a list of Data Field Parameters will display. Enter a value for each of the data field parameters.
   • Choose to send now or schedule for a future date and time.
     – Jobs will process on or after the date specified.
     – For Schedule Date and Time, enter the target date and time.
       Optionally, you can also specify a time zone.
   • Select Regenerate Population on Send if you want the population results refreshed at the time of processing.
4. Click Send.
The **Open Communication Job** page is displayed showing the processing status of the communication for the population.

5. Refresh the page to view updated status.
   
   When the **Status** field displays **Completed**, processing is complete.
Monitoring Communications

There are several ways to monitor communications sent through Banner Communication Management, depending on your role.

All types of users can access the Communication Jobs page, which displays all of your jobs and from which you can open and delete jobs. If you are an administrative user, you can view all jobs by user on the Communication Jobs page.

Administrative users can access the Communication Log page, which lists all communications that users successfully submitted through Banner Communication Management. Communications can be listed for all or selected constituents.

Administrative users can access the Error Log page to view a list of errors that occurred in processing communications.

What is the Communication Jobs page?

The Communication Jobs page displays summary information about all of your jobs or, if you are an administrative user, all jobs.

This page allows you to open a job to display detail information about it on the Open Communication Job page. You can stop a job from the Communication Jobs page.

Open a job

You can open a job to view detail information about a job.

Procedure

1. Click Communications on the Banner Communication Management landing page.
   The system displays the Communication Jobs page listing all of your jobs. If you are an administrative user, you can select the View All check box which will show all jobs by user.
2. Scroll to or search for the job for which you want to view detail information, and select it.
3. Click Open.
   The system displays the Open Communication Job page.

Stop a job

You can stop a job that is not complete.

Procedure

1. Click Communications on the Banner Communication Management landing page.
The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, select the **View All** check box to show all jobs by user.

2. Select the job you want to stop and click **Stop Job**.
   You can stop a job only if it is not marked as complete.

3. **Click Yes** on the confirmation message.

### Delete a job

You can delete a stopped or completed job. When you delete a job, all error log items associated with the job are also deleted.

**Procedure**

1. Click **Communications** on the Banner Communication Management landing page.
   The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, select the **View All** check box to show all jobs by user.
2. Scroll to or search for the job you want to delete, and select it.
3. **Click Delete**.
4. **Click Yes** on the confirmation message.

### Create a message from the Communication Jobs page

You can create a message from the **Communication Jobs** page.

**Procedure**

1. Click **Communications** on the Banner Communication Management landing page.
2. Scroll to or search for the job for which you want to create a message, and select it.
3. **Click Create Message**.
4. Enter data about the message on the **Create Message** page.
5. **Click Send**.
   The **Open Communication Job** page is displayed showing the processing status of the communication for the population. Refresh the page to view updated status. When the **Status** field displays **Completed**, processing is complete.

### Display detail communication job information

You can view summary and detail information about communication jobs successfully submitted through Banner Communication Management.

**Procedure**

1. Click **Communications** on the Banner Communication Management landing page.
The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, you can select the **View All** check box which will show all jobs.

2. To view detail information about a job, select it and click **Open**.
   The system displays the **Open Communication Jobs** page. A summary of the communication job information and the group send information is displayed, including a list of all the constituents included in the job.

3. **Optional:** You can stop the job, delete the job or refresh the job for updated results from this page.

4. **Optional:** If the job is complete and the communication channel is letter, you can click **Generate Letter Archive** to generate a PDF file of the letters.

5. **Optional:** If the job is not complete and you want to refresh the page to view updated results, click **Refresh**.

6. **Optional:** If the job is not complete and you want to stop it, select the job and click **Stop Job**.

7. **Optional:** If you want to delete the job, select the job and click **Delete Job**.

**Generate a letter archive**

You can generate a letter archive for a completed communication job that used a letter template.

**About this task**

Letters in the archive will only be generated for communication items that successfully completed. The files in the letter archive can be optionally printed and mailed to constituents. The archive is in zip format which is supported by most operating systems.

**Procedure**

1. Click **Communications** on the Banner Communication Management landing page.
   The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, select the **View All** check box to show all jobs by user.

2. Scroll to or search for the letter communication job for which you want to generate letter archive and select it.

3. Click **Open**.
   The system displays the **Open Communication Job** page.

4. Click **Generate Letter Archive** to generate PDF files of the letters successfully sent.

5. **Optional:** Edit the file name for the zip file that will be generated, the default file name is set to the name of the job.

6. **Optional:** Edit the number of Letters per PDF that will be generated.
   The default number of letters per PDF is 100. You can enter a number between 1-1000.

7. Click **Submit**.
   The system presents a window confirming that download is successful.

8. Open the .zip file and verify that the correct number of PDFs have been generated and review that the number of letters in the PDF matches the number you entered.
Optional: You can print the letters and mail to constituents.

Print a letter

You can generate and print a single PDF file for a successful letter communication created for a constituent.

Procedure

1. Click **Communications** on the Banner Communication Management landing page.
   The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, select the **View All** check box to show all jobs by user.
2. Scroll to or search for the letter communication job for which you want to generate letter archive and select it.
3. Click **Open**.
   - The system displays the **Open Communication Job** page.
   - The system displays a list of all the constituents included in the job.
   - A **Print** link is displayed for all constituents whose communication item processed successfully.
4. Scroll to or search for the constituent for whom you want to generate a single PDF and print.
5. Click **Print** to generate a single PDF file of the letter.
   The system opens the generated PDF file.
6. **Optional:** You can print the letter and email it to the constituent.

View failed communication items

You can view error details for failed communication items within a job.

Procedure

1. Click **Communications** on the Banner Communication Management landing page.
   The system displays the **Communication Jobs** page listing all of your jobs. If you are an administrative user, select the **View All** check box to show all jobs by user.
2. Scroll to or search for a communication job for that has errors and select it.
3. Click **Open**.
   The system displays the **Open Communication Job** page. The system displays a list of all the constituents included in the job including a status of the communication item sent.
   - Items that fail to process successfully will have a status of **Error**.
   - Items that complete successfully will have a status of **Complete**.
   - Items that are still processing will have a status of **Processing**.
   - Items that have been stopped will have a status of **Stopped**.
4. Click on the **Error** link of a communication item for a constituent. The system opens the **Error Details** window.
5. The user can review the details and fix it.

**What is the Communication Log?**

The **Communication Log** lists all communications that users successfully submitted through Banner Communication Management. Communications can be listed for all or selected constituents.

**Display the Communication Log**

You can use the Communication Log to view all communications that were sent to all constituents.

**About this task**

You must have an application administrator role (COMMUNICATIONADMIN) to display the Communication Log.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Communication Log** tab.
3. Scroll to review the communications.

**Display the Communication Log for selected constituents**

You can use the Communication Log to list all communications that were sent to selected constituents.

**About this task**

You must have an application administrator role (COMMUNICATIONADMIN) to display the Communication Log.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Communication Log** tab.
3. Enter the search string in the **Search by Banner ID** field.
   - Refer to **Communication search criteria** on page 69 for details about the format of the search string.
4. Press **Enter** to display the search results.
Communication search criteria

You can use various search criteria to find communications for selected constituents.

**Note:** A search string is not case sensitive. Special characters in a search string are ignored or removed from the query. For example, the string `sp^&$r` becomes `spr`.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Banner ID</td>
<td>Finds all communications for the Banner ID with the exact matching ID.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all communications for all Banner IDs that contain the specified search string.</td>
</tr>
<tr>
<td></td>
<td>Example: The search string <code>71</code> finds communications for Banner IDs A00071000 and A71038593.</td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all communications for all Banner IDs that contain the specified characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The following search strings find communications for all Banner IDs that contain the characters <code>308</code>.</td>
</tr>
<tr>
<td></td>
<td>• <code>%308</code></td>
</tr>
<tr>
<td></td>
<td>• <code>308%</code></td>
</tr>
<tr>
<td></td>
<td>• <code>%308%</code></td>
</tr>
<tr>
<td></td>
<td>• <code>*308</code></td>
</tr>
<tr>
<td></td>
<td>• <code>308*</code></td>
</tr>
<tr>
<td></td>
<td>• <code>*308*</code></td>
</tr>
<tr>
<td>? or _ wildcards</td>
<td>Finds all communications for all Banner IDs that contain the specific number of characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The search strings <code>A12????62</code> and <code>A12____62</code> find all communications for all Banner IDs that start with <code>A12</code>, followed by any four characters, followed by <code>62</code>.</td>
</tr>
</tbody>
</table>

What is the Error log?

Administrative users can view a list of errors that occurred in processing communications from the System Functions page.

The error log lists each transmission error separately, not grouped by jobs.

You can search for errors by Banner ID and open an item to display details about the error.
Display the error log

You can display summary and detail information about errors from the Error Log page.

Before you begin

You must have an application administrator role (COMMUNICATIONADMIN) to display the error log.

Procedure

1. Click System Functions on the Banner Communication Management landing page. 
   The system displays the Error Log page.

2. Optional: If you want to view details about an error, scroll to or search for the record that you want to view, select it, and click Open.
   The system displays details about the error in a new window.
Interactions

An interaction is recorded for each communication that is successfully sent to a constituent from Banner Communication Management.

Your institution can also record a manual interaction for a constituent for interactions that occur outside of Communications Management. You must search for a constituent to view interactions recorded for that constituent. This section provides information about managing interactions information. You can view interactions and record a manual interaction for a constituent. You must first define interaction types to record manual interactions.

Search for a constituent

Banner Communication Management requires you to search for a constituent to view interactions recorded for that constituent.

About this task

You can search for a constituent by using full Banner ID, entering at least the first three characters of the constituent’s first or last name or wildcards. You can search for constituents that you are authorized to access.

Procedure

1. Click Interactions on the Banner Communication Management landing page.
2. Enter the search string in the Search By Name or Banner ID field.
   Refer to Name or Banner ID search criteria for details about the format of the search string.
3. Press Enter to display the search results.
   • If there is one exact match, the interactions for the constituent will display.
   • If there is more than one match for the search criteria, the Select Person window will display.
   • If there is no match, a notification message will display.
4. Select the constituent for whom you want to view interactions and click OK.
   • All interactions recorded for the constituent will be shown.
   • If no interactions exist, a notification message will display.
### Search by Name or Banner ID

You can use various search criteria to find a constituent.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Banner ID</td>
<td>Finds the constituent with the exact matching Banner ID.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all constituent names that contain the specified search string. Example: The search string Smith finds constituents with a first or last name Smith.</td>
</tr>
</tbody>
</table>
| % or * wildcard | Finds all constituent names that contain the specified characters. Example: The following search strings find all constituents that contain the characters smith.
- %smi
- smi%
- %smi%
- *smi
- smi*
- *smi* |

**Note:** A search string is not case sensitive. Special characters in a search string are ignored or removed from the query. For example, the string sp^&$r becomes spr.

### View interactions details

View details of a system generated or manually recorded interaction for a constituent, and the information recorded for the constituent.

**Procedure**

1. Click **Interactions** on the Banner Communication Management landing page.
2. Search for a constituent by entering a search string into the **Search by Name** or **Banner ID** field, and click **Enter**.
   Refer to Name or Banner ID search criteria for details about the format of the search string.
   - If there is one exact match, the interactions for the constituent will display.
   - If there is more than one match for the search criteria, the Select Person window will display.
   - If there is no match, a notification message will display.
3. Select a constituent from the **Select Person** window, and click **OK**.
All recorded interactions for the constituent will display.

4. Select an interaction and click **Open** to view details.

5. Review details about the interaction.

The **Interaction Detail** displays the following read-only information:

- Banner ID and Full Name of constituent
- Date – Date the communication was sent or recorded
- Channel – Channel used to send the communication: Email, Letter, Manual and Mobile notification
- Template/Type – Name of the template or Interaction Type
- Folder – Name of Folder
- Organization – Name of Organization
- Created By – Name of the user who created the interaction
- Subject – Subject of the interaction if it is an email or description if it is a mobile notification
- Message Content for email, Mobile Headline, Headline, Body for mobile notification, Print link to view PDF of letter sent and Description if a manually recorded interaction.

### Record manual interaction

You can record a manual interaction for a constituent for communications that occur outside of Banner Communication Management.

**Procedure**

1. Click **Interactions** on the Banner Communication Management landing page.
2. Click **Record Manual Interaction**.
3. Enter the details for the interaction
   a) Search for or enter a **Banner ID** or **Name** of constituent, the person for whom you are creating a manual interaction. Refer to [Name or Banner ID search criteria](#) for details about the format of the search string.
   b) Select an **Organization** for the interaction.
   c) Select an **Interaction Type**.
   d) Enter the **Interaction Date and Time**.
   e) Edit the **Interactor** if the person who interacted with the student is someone other than the person who creates the interaction.
   f) Enter the **Subject** of the interaction.
   g) **Optional**: Optional: Enter a Description of the interaction.
   h) Click **Save**.
Edit a manual interaction

Edit the organization, interaction type, interaction date and time, interactor, subject, and description for a manual interaction if you were the creator of the original manual interaction.

Procedure

1. Click Interactions on the Banner Communication Management landing page.
2. Search for a constituent by entering a search string into the Search by Name or Banner ID fields, and then click Enter.
   Refer to Name or Banner ID search criteria for details about the format of the search string. If there is one exact match, the interactions for the constituent will display. If there is more than one match for the search criteria, the Select Person window will display. If there is no match, a notification message will display.
3. Select a constituent from the Select Person window, and then click OK.
   All recorded interactions for the constituent will display.
4. To edit an interaction:
   a) Select the interaction you want to edit.
   b) Click Open.
   c) Click Edit on the Interaction Detail window.
   d) Edit the data.

Interaction types

An interaction type allows your institution to be more specific in recording interactions with a constituent for communications that occur outside of Banner Communication Management. You can use an interaction type when recording a manual interaction for a constituent.

For example, you can create interaction types for the following types of interactions that occur with the constituent

- Advising Appointment
- Campus Visit
- College Night
- Counselor Visit

After you create an interaction type, you can use it to record a manual interaction for a constituent.
Search for an interaction type

Search for an existing interaction type by using the full interaction type name, any part of the interaction type name, or wildcards.

About this task
You can search for interaction types that are stored in the folders that you are authorized to access.

Procedure
1. Click Interactions on the Banner Communication Management landing page.
2. Select the Interaction Types tab.
3. Enter the search string in the Search by Interaction Type field.
   Refer to Interaction Type search criteria for details about the format of the search string.
4. Press Enter to display the search results.

Interaction type search criteria

Use various search criteria to find an interaction type.

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full interaction type name</td>
<td>Finds the interaction type with the exact matching name.</td>
</tr>
<tr>
<td>Search string</td>
<td>Finds all interaction type names that contain the specified search string.</td>
</tr>
<tr>
<td></td>
<td>Example: The search string college finds interaction types that are named College Night and College Fair.</td>
</tr>
<tr>
<td>% or * wildcard</td>
<td>Finds all interaction types that contain the specified characters.</td>
</tr>
<tr>
<td></td>
<td>Example: The following search strings find all query names that contain the characters appointment.</td>
</tr>
<tr>
<td></td>
<td>%appointment</td>
</tr>
<tr>
<td></td>
<td>appointment %</td>
</tr>
<tr>
<td></td>
<td>% appointment %</td>
</tr>
<tr>
<td></td>
<td>* appointment</td>
</tr>
<tr>
<td></td>
<td>appointment *</td>
</tr>
<tr>
<td></td>
<td>* appointment *</td>
</tr>
<tr>
<td>? or _ wildcards</td>
<td>Finds all interaction type names that contain the specific number of characters.</td>
</tr>
</tbody>
</table>
Search Type | Result
--- | ---
Example: The search strings housing????assignments and housing_ assignments find all query names that start with housing, followed by any four characters, followed by assignments.

Note: A search string is not case sensitive. Special characters in a search string are ignored or removed from the interaction type. For example, the string sp^&$r becomes spr.

View existing interaction type

View the name, description, folder name, and whether it is available for use.

About this task
You can view interaction types that are stored in the folders that you are authorized to access.

Procedure
1. Click Interactions on the Banner Communication Management landing page.
2. Select the Interaction Types tab.
3. Scroll to or search for the interaction type that you want to view, and select it.
4. Click Open.
5. Review information about the interaction type on the Open Interaction Type page.

Create an interaction type

Create an interaction type that will be available for use when recording a manual interaction for a constituent.

Before you begin
You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create an interaction type.

The folder where you want to store the query must already be defined.

The organization for which you want to record the interaction must already be defined.

Procedure
1. Click Interactions on the Banner Communication Management landing page.
2. Click the Interaction Types tab.
3. Click Add.
4. Enter data about the interaction type.
   a) Enter the Name.
b) **Optional:** Enter a description for the interaction type.

c) Select the **Folder Name**.
   This is the folder where you want to store the interaction type. The **Folder Name** drop-down list shows the folders that you are authorized to access.

d) Select the check-box available for use, this will make it available for use when you Record Manual Interaction.

5. Click **Save**.

---

**Edit an interaction type**

Edit an existing interaction type.

**Before you begin**

You need an application administrator role (COMMUNICATIONADMIN) to edit any interaction type. If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit an interaction type that you created. If you have an end user role (COMMUNICATIONUSER), you cannot edit an interaction type.

**Procedure**

1. Click **Interactions** on the Banner Communication Management landing page.
2. Click the **Interaction Types** tab.
3. Scroll to or search for the interaction type that you want to edit, and select it.
4. Click **Open**.
5. Click the **Edit** icon.
6. Edit the data.
7. Click **Save**.

---

**Copy an interaction type**

Copy an existing interaction type and use the copy as a basis for a new interaction type.

**Before you begin**

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy an interaction type. You must have access to the folder where the interaction type is currently stored and to the folder where you want to store the copied query.

**Procedure**

1. Click **Interactions** on the Banner Communication Management landing page.
2. Click the Interaction Types tab.
3. Scroll to and search for the interaction type that you want to copy, and then select it.
4. Click Copy.
5. Replace the default name in the Interaction Type Name field with a new, unique interaction type name.
6. Optional: Edit the Description.
7. Click Save.

Delete an interaction type

Delete an interaction type under certain conditions.

Before you begin

- You need an application administrator role (COMMUNICATIONADMIN), you can edit any interaction type.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only edit an interaction type that you created.
- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy an interaction type.

Procedure

1. Click Interactions on the Banner Communication Management landing page.
2. Click the Interaction Types tab.
3. Scroll to and search for the interaction type that you want to delete, and then select it.
4. Click Delete.
5. Click Yes on the confirmation message.
Managing Organization Information

This section provides information about managing organization information. You can define multiple organizations. You must first create a root organization to add organizations.

What is an organization?

An organization is an entity that supports Banner Communication Management at your institution. Your institution can have multiple organizations. Organizations allow your institution to send communications from various departments within your institutions. All communications generated through Banner Communication Management are generated for one of your defined organizations.

Organization information that is required to send email communications

- Organization name
- Outgoing email server
- Mailbox accounts

Organization information that is required to send mobile notifications

- Organization name
- Mobile Notification Settings

Create the root organization

Banner Communication Management requires a root organization. You can create other organizations after you have created a root organization.

Before you begin

You must have an application administrator role (COMMUNICATIONADMIN) to create an organization.

Note: If Fine Grained Access Control (FGAC) is being applied to restrict organization, ensure that at the minimum, the user has access to select the root organization.

Procedure

1. Click System Functions on the Banner Communication Management landing page.
2. Select the Organization tab.
   If no organization is set up, you are prompted to create a root organization.
3. Enter the General Settings.
   a) Enter the organization name.
Set up the outgoing email server

You must set up the server that handles outgoing emails.

**Before you begin**
You must have an application administrator role (COMMUNICATIONADMIN) to set up the server.

**About this task**

**Note:** You can use the same steps to edit any settings for the outgoing email server.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Select **View Root Organization**, or scroll to, or search for the organization that you want to edit, select and click **Open**.
4. When the **Organization** page displays, click **Edit**.
5. Enter Outgoing Email Server settings.
   a) Enter server host name.
   b) Enter port.
      
      **Note:** When server host name is entered, then port is required.
   
   c) **Note:** The **Does Server require Authentication?** check box is selected by default.

      You must enter a user name and password for the reply-to and sender mailbox accounts.
Set up the mailbox accounts

You must set up two mailbox accounts. The "reply to" mailbox account is the account to which recipients can send response messages. The "sender" mailbox account is used to send emails to recipients. The "reply to" and "sender" mailbox accounts can be the same or different mailbox accounts.

Before you begin

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.

About this task

You can use the same steps to edit any settings for the mailbox accounts.

Procedure

1. Click System Functions on the Banner Communication Management landing page.
2. Select the Organization tab.
3. Select View Root Organization, or scroll to, or search for the organization that you want to edit, and click Open.
4. When the Organization page displays, click Edit.
5. Enter reply-to-mailbox account information for the mailbox account to which recipients can send response messages:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>The user name of the mailbox account that is used for replies.</td>
</tr>
<tr>
<td>Email Address</td>
<td>The email address where responses are sent.</td>
</tr>
<tr>
<td>Display Name</td>
<td>The name that is displayed when a recipient clicks Reply To.</td>
</tr>
</tbody>
</table>

6. Enter sender mailbox account information for the mailbox account that sends emails to recipients:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>The user name of the mailbox account that sends the emails.</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
Email Address | The email address that sends the emails.
Display Name | The name that is displayed as the “from” address when emails are sent.

**Note:** For both reply-to and sender mailbox accounts, when the user name is entered, then email address is required.

**Note:** For both reply-to and sender mailbox accounts, when the **Does Server require Authentication?** check box is cleared in **Outgoing Email Server Settings**, the **Username** and **Password** fields will not be required.

7. Click **Save**.

### Set up mobile notification settings

You must set up mobile notification settings to send mobile notifications.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mobile notification settings.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Select **View Root Organization** or scroll to or search for the organization that you want to edit, select and click **Open**.
4. When the **Organization** page displays, click **Edit**.
5. **Note:** When end point URL is entered, then application name and application key are required.

   Enter the end point URL, application name, and application key Mobile Notification settings.
6. Click **Save**.

### Edit the root organization

You can edit the root organization.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.
Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Select **View Root Organization** or scroll to or search for the organization that you want to edit, and click **Open**.
4. When the **Organization** page displays, click **Edit**.
5. **Optional:** Edit the general settings.
6. **Optional:** Edit the outgoing email server settings. Refer to Set up the outgoing email server on page 80 for more information.
7. **Optional:** Edit the mailbox account settings. Refer to Set up the mailbox accounts on page 81 for more information.
8. **Optional:** Edit the mobile notification settings. Refer to Set up mobile notification settings on page 82 for more information.
9. Click **Save**.

Add an organization

You can add organizations from which communications can be sent. Organizations can be added after a Root Organization has been created.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.

**Note:** The organization inherits mobile notification settings from the Root Organization.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Click **Add**.
4. When the **Add Organization** page displays, enter General Settings:
   a) Enter the organization name.
   b) **Optional:** Enter the description.
   a) **Optional:** Check the **Available for display** check box to make the organization available when sending a communication.
5. Enter reply-to mailbox Email Account Settings for the mailbox account to which recipients can send response messages:
Managing Organization Information

### Field | Description
--- | ---
Username | The user name of the mailbox account that is used for replies.
Email Address | The email address where responses are sent.
Display Name | The name that is displayed when a recipient clicks **Reply To**.

6. Enter sender mailbox Email Account Settings for the mailbox account that sends emails to recipients:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
<td>The user name of the mailbox account that sends the emails.</td>
</tr>
<tr>
<td>Email Address</td>
<td>The email address that sends the emails.</td>
</tr>
<tr>
<td>Display Name</td>
<td>The name that is displayed as the &quot;from&quot; address when emails are sent.</td>
</tr>
</tbody>
</table>

**Note:** For both reply-to and sender mailbox accounts, when username is entered then email address is required.

**Note:** For both reply-to and sender mailbox accounts, when the **Does Server require Authentication?** check box is cleared in **Outgoing Email Server Settings**, the Username and Password fields will not be required.

7. Click **Advanced Settings** to verify the settings are inherited from the root organization.
8. Click **Edit** to change the server host name, port, and connection settings.
9. Click **Save**.

## Edit an organization

You can edit an organization.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Scroll to and select the organization that you want to edit, and click **Open**.
4. When the **Organization** page displays, click **Edit**.
5. **Optional:** Edit the general settings.
6. **Optional:** Edit the mailbox account settings.
7. **Optional:** Edit the advanced settings.
8. Click **Save**.

## Copy an organization

You can copy an existing organization and use the copy as a basis for a new organization.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Select **View Root Organization** or scroll to or search for the organization that you want to copy and select it.
4. Click **Copy**.
5. Replace the default name in the **Organization Name** field with a new, unique name.
6. **Optional:** Edit the **Description** and **Email Account Settings** fields.
7. Click **Save**.

## Delete an organization

You can delete an organization unless communications exist for that organization. When communications exist for an organization, it cannot be deleted.

**Before you begin**

You must have an application administrator role (COMMUNICATIONADMIN) to set up the mailbox accounts.

**Procedure**

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organization** tab.
3. Select **View Root Organization** or scroll to or search for the organization that you want to delete and select it.
4. Click **Delete**.
5. Click **Yes** on the confirmation message.
Managing Folders

This section provides information about managing the folders that organize your templates, data fields, queries, and populations.

What is a folder?

Folders are used to organize templates, data fields, queries, and populations. Folders help secure Banner Communication Management by limiting user access to specific folders.

One suggestion is to create a folder for each administrative department that uses Banner Communication Management.

Search for a folder

You can search for an existing folder by using the full folder name, any part of the folder name, or wildcards.

Procedure

1. Click Folders on the Banner Communication Management landing page.
2. Enter the search string in the Search by Folder Name field.
   Refer to Folder search criteria on page 87 for details about the format of the search string.
3. Press Enter to display the search results.

Folder search criteria

You can use various search criteria to find a folder.

Note: A search string is not case sensitive.

Note: Special characters in a search string are ignored or removed from the query. For example, the string sp^&$r becomes spr.

Note: A folder name with the System Created column as Yes, cannot be edited or deleted as it is a part of the seed data.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full folder name</td>
<td>Finds the folder with the exact matching name.</td>
</tr>
</tbody>
</table>
### Search Criteria

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
</table>
| **Search string** | Finds all folder names that contain the specified search string.  
Example: The search string *office* finds folders that are named Admissions Office and Financial Aid Office. |
| **% or * wildcard** | Finds all folder names that contain the specified characters.  
Example: The following search strings find all folder names that contain the characters *student*.  
- %student  
- student%  
- %student%  
- *student  
- student*  
- *student* |
| **? or _ wildcards** | Finds all folder names that contain the specific number of characters.  
Example: The search strings registrar????office and registrar____office find all folder names that start with registrar, followed by any four characters, followed by office. |

### Create a folder

You can create a folder to store templates, data fields, queries, and populations.

**Before you begin**

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to create a folder.

**Procedure**

1. Click **Folders** on the Banner Communication Management landing page.
2. Click **Add**.
3. Enter the folder name and optional folder description.
4. Click **Save**.
Edit a folder

You can edit an existing folder.

About this task

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to edit a folder.

Procedure

1. Click Folders on the Banner Communication Management landing page.
2. Scroll to or search for the folder that you want to edit, and select it.
3. Click Open.
4. Click the Edit icon.
5. Edit the folder name, the description or both.
6. Click Save.

Copy a folder

You can copy an existing folder and use the copy as a basis for a new folder.

Before you begin

You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to copy a folder.

Procedure

1. Click Folders on the Banner Communication Management landing page.
2. Scroll to or search for the folder that you want to copy, and select it.
3. Click Copy.
4. Replace the default name in the Folder Name field with a new, unique folder name.
5. Optional: Edit the folder description.
6. Click Save.
Delete a folder

You can delete a folder under certain conditions.

About this task

• If you have an end user role (COMMUNICATIONUSER), you cannot delete any folder.
• If you have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN), you can delete any empty folder.
• No user can delete a folder if templates, data fields, queries, or populations or all of them are associated with the folder.
• No user can delete a folder if the System Created column is Yes, as it is a part of the seed data.

Procedure

1. Click Folders on the Banner Communication Management landing page.
2. Scroll to or search for the folder that you want to delete, and select it.
3. Click Delete.
4. Click Yes on the confirmation message.