



Banner Communication Management User Guide

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Contents

About Banner Communication Management.....	7
Features.....	7
Processing flow.....	8
Landing page.....	10
Security considerations.....	11
Organizational security.....	11
Role-based security.....	11
Banner Communication Management configurations.....	14
Using Templates.....	15
What is a template?.....	15
Search for a template.....	16
Template search criteria.....	16
View an existing template.....	17
Create a template for an email.....	17
Content editing features.....	19
Insert a data field into a template.....	22
Create a template for a letter.....	23
Create a template for a mobile notification.....	26
Test an email template.....	27
Test a letter template.....	28
Test a mobile notification template.....	29
Edit a template.....	29
Share an existing template.....	30
Copy a template.....	31
Delete a template.....	31
Using Data Fields.....	33
What is a data field?.....	33
Search for a data field.....	33
Data field search criteria.....	34
View an existing data field.....	35
Create a data field.....	35
Data field formatting.....	37
Edit a data field.....	40
Copy a data field.....	41
Test a data field.....	42
Delete a data field.....	42
Using Data Field Parameters.....	44
What is a data field parameter?.....	44
Search for a data field parameter.....	45
Data field parameter search criteria.....	45

View an existing data field parameter.....	46
Create a data field parameter.....	46
Edit a data field parameter.....	47
Copy a data field parameter.....	48
Delete a data field parameter.....	48
Using Queries.....	50
What is a query?.....	50
Query scenarios.....	50
Search for a query.....	51
Query search criteria.....	52
View an existing query.....	52
Create a query.....	53
Publish a query.....	54
Generate population.....	54
Edit a query.....	55
Copy a query.....	56
Copy a displayed query version.....	57
Delete a query.....	57
Delete a displayed query version.....	58
Using Populations.....	59
What is a population?.....	59
Search for a population.....	60
Population search criteria.....	60
View population details.....	61
Create a population.....	62
Manually Added Profiles.....	63
Regenerate population.....	64
Delete a population.....	65
Send a Communication.....	66
What are the building blocks of a communication?.....	66
Create messages.....	67
Monitor Communications.....	69
Communication Jobs page.....	69
Recurrent communication messages.....	69
Communication log.....	70
Error log.....	70
Manage communications.....	70
Create messages.....	70
Open a job or recurrent message.....	72
Stop a job or recurrent message.....	72
Delete a job or recurrent message.....	72
Display detail communication job information.....	73
Generate a letter archive.....	73
Print a letter.....	74
View failed communication items.....	74

Understand job status.....	75
Display the Communication Log.....	76
Display the Communication Log for selected constituents.....	77
Communication search criteria.....	77
Display the error log.....	78
Interactions.....	79
Search for a constituent.....	79
Search by Name or Banner ID.....	80
View interactions details.....	80
Record manual interaction.....	81
Edit a manual interaction.....	82
Interaction types.....	82
Search for an interaction type.....	83
Interaction type search criteria.....	83
View existing interaction type.....	84
Create an interaction type.....	84
Edit an interaction type.....	85
Copy an interaction type.....	85
Delete an interaction type.....	86
Managing Organization Information.....	87
What is an organization?.....	87
Create the root organization.....	87
Set up the outgoing email server.....	88
Set up the mailbox accounts.....	89
Set up mobile notification settings.....	90
Email and mobile notifications server settings test.....	90
Test email server settings.....	90
Test mobile notification settings.....	91
Edit the root organization.....	92
Add an organization.....	93
Edit an organization.....	94
Copy an organization.....	94
Delete an organization.....	95
Managing Event Mappings.....	96
What is an event mapping?.....	96
Search for an event mapping.....	96
Event mapping search criteria.....	97
Create an event mapping.....	97
Edit an event mapping.....	98
Delete an event mapping.....	98
Managing Folders.....	100
What is a folder?.....	100
Search for a folder.....	100
Folder search criteria.....	101
Create a folder.....	101

Edit a folder.....	102
Copy a folder.....	102
Delete a folder.....	103

About Banner Communication Management

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

You can send the following communications to your constituents:

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

Features

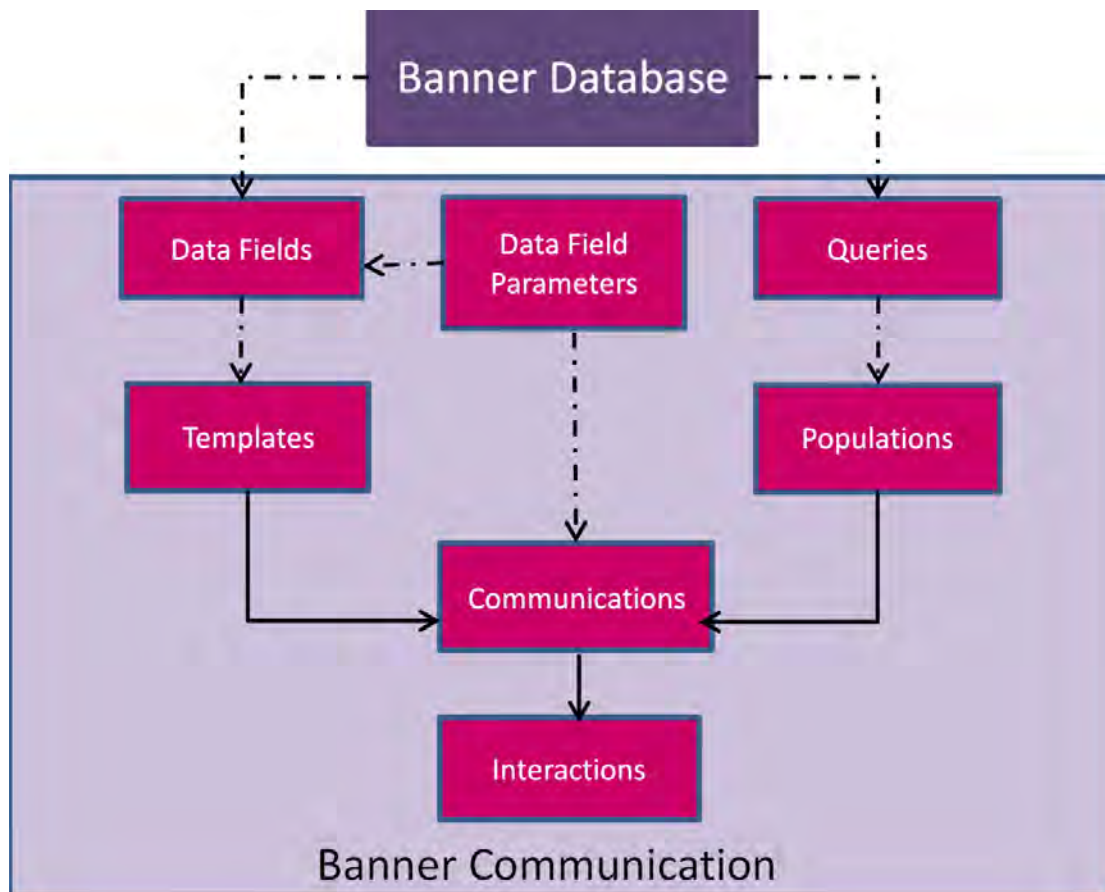
Your administrative users can use the following Banner Communication Management features to send communications to constituents across your institution.

- 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 the ability to find them.
- Schedule recurrent communications for messages that you need to periodically send to your constituents.

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.

Landing page

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

Option	Description
Communications	<p>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.</p> <p>Send a communication to constituents.</p> <p>If you are an administrative user, all jobs are displayed, not just yours.</p>
Templates, Data fields, and Parameters	<p>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.</p> <p>Send a communication to constituents.</p>
Populations	<p>Use this option to view a list of constituents in a population, send a communication to constituents in a population.</p>
Queries	<p>Use this option to define and run a query that select groups of constituents in Banner.</p>
Folders	<p>Use this option to organize templates, data fields, queries, and populations.</p>
Interactions	<p>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.</p>
System Functions	<p>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.</p> <p>Note: This option is only available to the application administrator.</p>

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

Component	Tasks
Folders	View folders that the user is authorized to access.
Queries	View and run queries in folders that the user is authorized to access.
Populations	<ul style="list-style-type: none"> • View populations in folders that the user is authorized to access. • Add new populations.
Templates	View templates in folders that the user is authorized to access.
Data fields	View and test data fields in folders that the user is authorized to access.
Parameters	View data field parameters in folders that the user is authorized to access.
Communications	<ul style="list-style-type: none"> • Create messages based on existing templates and populations in folders that the user is authorized to access. • View and manage communication jobs created by the user.
Interactions	View interactions for a constituent with the ability to record manual interactions that occur outside of communications management.

Table 2: Tasks that an author (role COMMUNICATIONCONTENTADMIN) can perform

Component	Tasks
Folders	<ul style="list-style-type: none"> • View folders that the user is authorized to access. • Add new folders. • Edit and delete folders that were created by the user.
Queries	<ul style="list-style-type: none"> • View, copy, edit, delete, and run queries in folders that the user is authorized to access. • Add new queries to folders that the user is authorized to access.
Populations	<ul style="list-style-type: none"> • View populations in folders that the user is authorized to access. • Add new populations. • Delete populations that were created by the user.
Templates	<ul style="list-style-type: none"> • View, copy, and publish templates in folders that the user is authorized to access. • Add new templates to folders that the user is authorized to access. • Edit and delete templates that were created by the user.
Data fields	<ul style="list-style-type: none"> • View, copy, and test data fields in folders that the user is authorized to access. • Add new data fields to folders that the user is authorized to access. • Edit and delete data fields that were created by the user.
Parameters	<ul style="list-style-type: none"> • View, copy and test data field parameters in folders that the user is authorized to access. • Add new data field parameters to folders that the user is authorized to access. • Edit and delete data field parameters that were created by the user.
Communications	<ul style="list-style-type: none"> • Send communications for templates and populations that are in folders that the user is authorized to access. • View and manage communication jobs created by the user.
Interactions	View interactions with constituents with the ability to record manual interactions that occur outside of communications management.

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

Component	Tasks
Folders	<ul style="list-style-type: none"> • View, edit, and delete any folder. • Add new folders.
Queries	<ul style="list-style-type: none"> • View, copy edit, delete, and run any query. • Add new queries to any folder.
Populations	View and delete any population
Templates	<ul style="list-style-type: none"> • View, copy, edit, delete, and publish any template. • Add new templates to any folder.
Data fields	<ul style="list-style-type: none"> • View, copy, edit, delete, and test any data field. • Add new data fields to any folder.
Parameters	<ul style="list-style-type: none"> • View, copy, edit, and test any data field parameters. • Add new data field parameters to any folder.
Communications	<ul style="list-style-type: none"> • Send communications for any template and any population. • View and manage communication jobs created by all users.
Organizations	<ul style="list-style-type: none"> • View and edit organization information, email server settings, email account settings, and mobile notification settings. • Add new organizations.
Event Mappings	View and edit event mapping information to associate Templates and organizations to events.
Error Log	View a list of errors that occurred when sending a communication.
Communication Log	View a list of communications that were sent by all users.
Interactions	View interactions for a constituent with the ability to record manual interactions that occur outside of communications management.
Interaction Types	<ul style="list-style-type: none"> • View, copy, edit, and delete interaction types. • Add new interaction types to any folder.

Banner Communication Management configurations

You must configure some settings before you implement Banner Communication Management pages.

Note: These configuration options affect only the Banner Communication Management application. Your choices regarding these settings do not affect any other part of Banner.

When you make configuration changes in the Banner Applications Configurations (GUACONF) page, Banner Communication Management picks up the changes the next time that the quartz scheduler runs.

The interval when it runs depends on the `configJob.interval` configuration value in the `CommunicationManagement_configuration.groovy` file.

Refer to the sections that describe configuring application-specific settings in the *Banner Communication Management 9.5 Installation Guide* for information about maintaining configuration settings in the database.

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 16 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`.

Search Criteria	Result
Full template name	Finds the template with the exact matching name.
Search string	Finds all template names that contain the specified search string. Example: The search string <code>assign</code> finds templates that are named Room Assignment and Assign Adviser.
% or * wildcard	Finds all template names that contain the specified characters. Example: The following search strings find all template names that contain the characters <code>student</code> . <ul style="list-style-type: none"> • <code>%student</code> • <code>student%</code> • <code>%student%</code> • <code>*student</code> • <code>student*</code> • <code>*student*</code>

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

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** or double-click on the selected row.
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 37 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 19 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:
 - 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**.


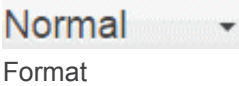















Refer to [Create messages](#) on page 67 for more information.












Content editing features

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

Button	Description
 Source	Displays the email content in HTML format
 New Page	Clears the editing area, creating a blank page
 Preview	Displays a preview of the email as it will be seen by recipients
 Templates	Displays predefined email templates that you can use to format the email
 Cut	Cuts text and places it on your clipboard Note: If your browser blocks this feature, use Ctrl+X.

Button	Description
 Copy	<p>Copies text to your clipboard</p> <p>Note: If your browser blocks this feature, use Ctrl+C.</p>
 Paste	<p>Pastes text from your clipboard to the email content</p> <p>Note: If your browser blocks this feature, use Ctrl+V.</p>
 Paste as plain text	<p>Pastes text, minus formatting, from your clipboard to the email content.</p> <p>Note: If your browser blocks access to your clipboard, a text box is displayed.</p> <ol style="list-style-type: none"> 1. Use Ctrl+V to paste the text into the text box. 2. Then click OK to paste the text into the email content.
 Paste from Word	<p>Pastes text that was copied from Microsoft Word or Microsoft Excel into the email content, preserving basic formatting from the original text.</p> <p>Note: If your browser blocks this feature, use Ctrl+V.</p> <p>Note: To avoid conflicts with the email that you are creating, some font styles from the original text are not preserved.</p>
 Undo	<p>Cancels the latest change and restores the previous content.</p>
 Redo	<p>Reverts the latest undo operation and restores the content that existed before the undo.</p>
 Find	<p>Searches the email content for a character string. Options include:</p> <ul style="list-style-type: none"> • Match case. • Match whole-words only. • Restart the search when the end of text is reached (cyclic).
 Replace	<p>Replaces text with another character string. Options include:</p> <ul style="list-style-type: none"> • Replace one or all occurrences. • Match case. • Match whole-words only. • Restart the replace when the end of text is reached (cyclic).
 Select All	<p>Selects all content in the email, making it easier to apply formatting to the entire email.</p>

Button	Description
 Spell Checker	Provides a spell checker, grammar checker, and thesaurus. Note: Out-of-the box, this feature supports ads. If you do not want ads, your institution must purchase a license from http://www.webspellchecker.net .
 Paragraph Format	Applies a format style to the selected text.
 Font Name	Applies a font to the selected text.
 Font Size	Applies a font size to the selected text.
 Text Color	Applies a text color to the selected text.
 Background Color	Applies a background color to the selected text.
 Bold	Formats the text with bold font.
 Italic	Formats the text with italics.
 Underline	Formats the text with underline.
 Strike Through	Formats the text with a strike-through.
 Remove Format	Removes all formatting from the selected text, resulting in plain text.
 Numbered List	Inserts and removes a numbered list.
 Bulleted List	Inserts and removes a bulleted list.
 Decrease Indent	Removes nested indents from numbered and bulleted lists.
 Increase Indent	Indents items in numbered and bulleted lists to provide nesting.
 Create Div Container	Adds a container around a document fragment so formatting can be applied to the fragment. Note: This feature is intended for advanced users.
 Align	Aligns text (left, centered, right, or justified).

Button	Description
 Link	Adds a clickable hyperlink for a URL, anchor in the document, or email address.
 Unlink	Removes a clickable hyperlink, leaving plain text.
 Anchor	Creates an anchor that can be used as the target of a hyperlink within the document.
 Image	Inserts, edits, and manages an image.
 Table	Creates and formats a table.
 Insert Horizontal Line	Inserts a horizontal line.
 Insert Special Character	Inserts special characters that are not part of a normal keyboard.
 Insert Page Break for Printing	Inserts a horizontal page break, allowing you to divide text into physical pages for printing.
 Maximize	Toggles the editor, inside the browser window, between maximized and normal view. Note: This feature is not available in some browsers.
 Show Blocks	Shows borders around blocks of content.
 About CKEditor	Shows the version number, documentation link, and licensing link for the CKEditor editing tool.

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** or double-click on the selected row.
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 67 for more information.

Test an email template

Use the Test Email feature to verify that the format, content and data fields used in the email template are correct.

About this task

The Template does not have to be published to test.

Procedure

1. Click **Templates** on the Banner Communication Management landing page.
2. From the list of templates, select a template to test and click **Open**.
3. Click the **More** icon from any tab and select **Test Email**.
The test feature is available on all of the tabs.
The Test Email Template window opens that displays the message `Send a test email using this template.`
4. Select the organization from the **Organization** drop-down menu from which you want the test email to be sent from.
5. Type a name or a Banner ID in the **Send message to** field.
The search list filters as you type a name or Banner ID.
6. After you select the name or Banner ID, click **Send**.
If the test is successful, the message `Email Successfully Submitted` appears.

Test a letter template

Use the Test Letter feature to verify that the format, content and data fields used in the letter template are correct.

About this task

The Template does not have to be published to test.

Procedure

1. Click **Templates** on the Banner Communication Management landing page.
2. From the list of templates, select a template to test and click **Open**.
3. Click the **More** icon from any tab and select **Test Letter**.

The test feature is available on all of the tabs.

The Test Letter Template window opens that displays the message `Create a test letter using this template`.

4. Select the organization from the **Organization** drop-down menu from which you want the test letter to be sent from.
5. Type a name or a Banner ID in the **Send message to** field.
The search list filters as you type a name or Banner ID.
6. After you select the name or Banner ID, click **Create**.

Note: The PDF and ZIP files that generate have the same name as the job name by default. If the user overrides the name, the file system will not permit the following special characters, and an underscore will replace that character.

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)

If the letter test is successful, a `Letter Created Successfully` message appears.

7. Click on the **Print** link to download the letter and view it.
8. From the **Interactions** page, you can search for the name or Banner ID of the person that the test letter and print the letter.

Test a mobile notification template

Use the Test Mobile Notification feature to verify that the format, content and data fields used in the mobile notification template are correct.

About this task

The Template does not have to be published to test.

Procedure

1. Click **Templates** on the Banner Communication Management landing page.
2. From the list of templates, select a template to test and click **Open**.
3. Click the **More** icon from any tab and select **Test Mobile Notification**.

The test feature is available on all of the tabs.

The Test Mobile Notification window opens that displays the message `Send a test mobile notification using this template.`

4. Select the organization from the **Organization** drop-down menu from which you want the mobile notification to be sent from.
5. Type a name or a Banner ID in the **Send message to** field.
The search list filters as you type a name or Banner ID.

Note: If the person selected does not have an External ID, their name displays in red text and Banner Communication Management disables the Send button.

6. After you select the name or Banner ID, click **Send**.
If the mobile notification test is successful, a `Mobile notification Successfully Submitted` message appears.

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** or double-click on the selected row.
 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 67 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** or double-click on the selected row.
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 **Mobile Notification Content** 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 67 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 34 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`.

Search Criteria	Result
Full data field name	Finds the data field with the exact matching name.
Search string	Finds all data field names that contain the specified search string. Example: The search string <code>name</code> finds data fields that are named <code>First_Name</code> and <code>Name_Prefix</code> .
% 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 <code>housing</code> . <ul style="list-style-type: none"> • <code>%housing</code> • <code>housing%</code> • <code>%housing%</code> • <code>*housing</code> • <code>housing*</code> • <code>*housing*</code>
? or _ wildcards	Finds all data field names that contain the specific number of characters. Example: The search strings <code>city????address</code> and <code>city__address</code> find all data field names that start with <code>city</code> , followed by any four characters, followed by <code>address</code> .

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** or double-click on the selected row.
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.
 - 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 37 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 > Open Field > 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:

```
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:

```
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**:

```
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**:

```
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 > Open Field > 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:

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

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:

```
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:

```
<ul>
  $description, reason:{ d,r|
  <li>$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** or double-click on the selected row.
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 40.

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** or double-click on the selected row.
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 45 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`.

Search Criteria	Result
Full parameter name	Finds the parameters with the exact matching name.
Search string	Finds all parameter names that contain the specified search string. Example: The search string <code>code</code> finds parameters that are named <code>Term_Code</code> and <code>Letter_Code</code> .

Search Criteria	Result
% or * wildcard	<p>Finds all parameter names that contain the specified characters.</p> <p>Example: The following search strings find all parameter names that contain the characters <code>housing</code>.</p> <ul style="list-style-type: none"> • <code>%housing</code> • <code>housing%</code> • <code>%housing%</code> • <code>*housing</code> • <code>housing*</code> • <code>*housing*</code>
? or _ wildcards	<p>Finds all parameter names that contain the specific number of characters.</p> <p>The search strings <code>city????address</code> and <code>city__address</code> find all parameter names that start with <code>city</code>, followed by any four characters, followed by <code>address</code>.</p>

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** or double-click on the selected row.
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 52 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`.

Search Criteria	Result
Full query name	Finds the query with the exact matching name.
Search string	Finds all query names that contain the specified search string. Example: The search string <code>list</code> finds queries that are named Class List and List of Athletes.
% or * wildcard	Finds all query names that contain the specified characters. Example: The following search strings find all query names that contain the characters <code>student</code> . <ul style="list-style-type: none"> • <code>%student</code> • <code>student%</code> • <code>%student%</code> • <code>*student</code> • <code>student*</code> • <code>*student*</code>
? or _ wildcards	Finds all query names that contain the specific number of characters. Example: The search strings <code>housing????assignments</code> and <code>housing___assignments</code> find all query names that start with <code>housing</code> , followed by any four characters, followed by <code>assignments</code> .

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** or double-click on the selected row.
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
 - 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 Options for future Regenerations of this Population:**
 - Select the **Always use the latest published version of the query** check box 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.
 - Select the **Schedule population generation** check box if you want to run the generation at a later date and time and enter a target date and time.
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** or double-click on the selected row.
 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 60 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 67 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`.

Search Criteria	Result
Full population name	Finds the population with the exact matching name.
Search string	Finds all population names that contain the specified search string. Example: The search string <code>list</code> finds populations that are named Class List and List of Athletes.

Search Criteria	Result
% or * wildcard	<p>Finds all population names that contain the specified characters.</p> <p>Example: The following search strings find all population names that contain the characters <code>student</code>.</p> <ul style="list-style-type: none"> • <code>%student</code> • <code>student%</code> • <code>%student%</code> • <code>*student</code> • <code>student*</code> • <code>*student*</code>
? or _ wildcards	<p>Finds all population names that contain the specific number of characters.</p> <p>Example: The search strings <code>senior????students</code> and <code>senior____students</code> find all population names that start with <code>senior</code>, followed by any four characters, followed by <code>students</code>.</p>

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** or double-click on the selected row.
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 67 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 54 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, xlsx) must have at least one row with data to import. If the file has only one row and it is a header row, the import button will remain disabled.

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

Note: Currently, only the data in the first worksheet will be imported.

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.

Note: The preview displays only the first few rows of the spreadsheet as a sample.

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.

Send a Communication

This section provides information about sending a communication to constituents in a population.

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 the message now, schedule to send at a future date and time, or define a recurrent schedule for sending the message.
 - Jobs will process on or after the date specified.
 - For Schedule Date and Time, enter the target date and time. You can specify a time zone.
 - For recurrent schedule, select the Recurrent Message tab and define the message frequency by day, week, month, or year. Enter start and end dates. You have the option to enter the number of occurrences to limit the the messages, and you can 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** or the **Recurrent Messages** page displays depending on how you defined the message.

- If you created a one-time message, it will be displayed showing the processing status of the communication for the population.
- If you created a recurrent communication, it will be listed with a processing status of New.

5. Refresh the page to view updated status.

- For a one-time message, when the **Status** field displays `Completed`, processing is complete.
- For a recurrent message, when the status changes to `Scheduled`, it starts executing the occurrences according to the frequency you defined.

6. Go to the **Communication Jobs** page to view the jobs created for each execution of the recurrent message.

Monitor Communications

There are several pages you can use to monitor communications sent through Banner Communication Management depending on your role.

Page	All users	Administrative users
Communication Jobs	<ul style="list-style-type: none"> View all of their jobs. Open, stop, and delete jobs. 	<ul style="list-style-type: none"> View all jobs by user. Perform tasks listed for all users.
Communication Recurrent Messages	<ul style="list-style-type: none"> View all of their recurrent communications. Open, stop, and delete recurrent communications. 	<ul style="list-style-type: none"> View all recurrent communications by user. Perform tasks listed for all users.
Communication Log	No access	View all communications that users successfully submitted through Banner Communication Management. The list can include communications for all or selected constituents.
Error Log	No access	View a list of errors that occurred when processing communications.

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.

Recurrent communication messages

You can schedule to send recurring messages by minute, hour, day, week, month, or year. You can also define advanced recurring scenarios by using a Cron expression with the scheduler.

You use a start and end date or number of occurrences to define when to send the message. If you do not specify an end date or number of occurrences, BCM sends the message until you stop it.

Recurrent communications support all existing template types (email, mobile notification, and letter) and the ability to regenerate a population when sending.

Communication log

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

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.

Manage communications

Managing communications includes creating messages, generating and printing letters, and monitoring jobs using the communication and error logs. You use the Communications and System Functions features to manage these tasks.

When using the **Communication Jobs** or **Communication Recurrent Messages** pages, you can click the **View All** check box to see messages for all users sorted by user.

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 the message now, schedule to send at a future date and time, or define a recurrent schedule for sending the message.
 - Jobs will process on or after the date specified.
 - For Schedule Date and Time, enter the target date and time. You can specify a time zone.
 - For recurrent schedule, select the Recurrent Message tab and define the message frequency by day, week, month, or year. Enter start and end dates. You have the option to enter the number of occurrences to limit the the messages, and you can 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** or the **Recurrent Messages** page displays depending on how you defined the message.

 - If you created you created a one-time message, it will be displayed showing the processing status of the communication for the population.
 - If you created a recurrent communication, it will be listed with a processing status of New.
5. Refresh the page to view updated status.
 - For a one-time message, when the **Status** field displays *Completed*, processing is complete.
 - For a recurrent message, when the status changes to *Scheduled*, it starts executing the occurrences according to the frequency you defined.
6. Go to the **Communication Jobs** page to view the jobs created for each execution of the recurrent message.

Open a job or recurrent message

You can open a job or recurrent message to view detail information about it.

Procedure

1. Click **Communications** on the Banner Communication Management landing page.
2. Open the job or recurrent message.
 - To open a job, on the **Communication Jobs** page find the job you want to view and select it.
 - To open a recurrent message, click the **Communication Recurrent Messages** page, find the recurrent message you want to view and select it.
3. Click **Open**.

Stop a job or recurrent message

You can stop a job or recurrent message that is not complete.

Procedure

1. Click **Communications** on the Banner Communication Management landing page.
2. To stop a job, on the **Communication Jobs** page select the job and click **Stop Job**.
3. To stop a recurrent message, click the **Communication Recurrent Messages** page, select the recurrent message, and click **Stop**.
4. Click **Yes** on the confirmation message.

Delete a job or recurrent message

You can delete a stopped or completed job or recurrent message. When you delete a job, BCM deletes all error log items associated with the job.

Procedure

1. Click **Communications** on the Banner Communication Management landing page.
2. To delete a job, on the **Communication Jobs** page find the job and select it.
3. To delete a recurrent message, click the **Communication Recurrent Messages** page, find the recurrent message, and select it.
4. Click **Delete**.
5. Click **Yes** on the confirmation message.

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.
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.
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.
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.
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.

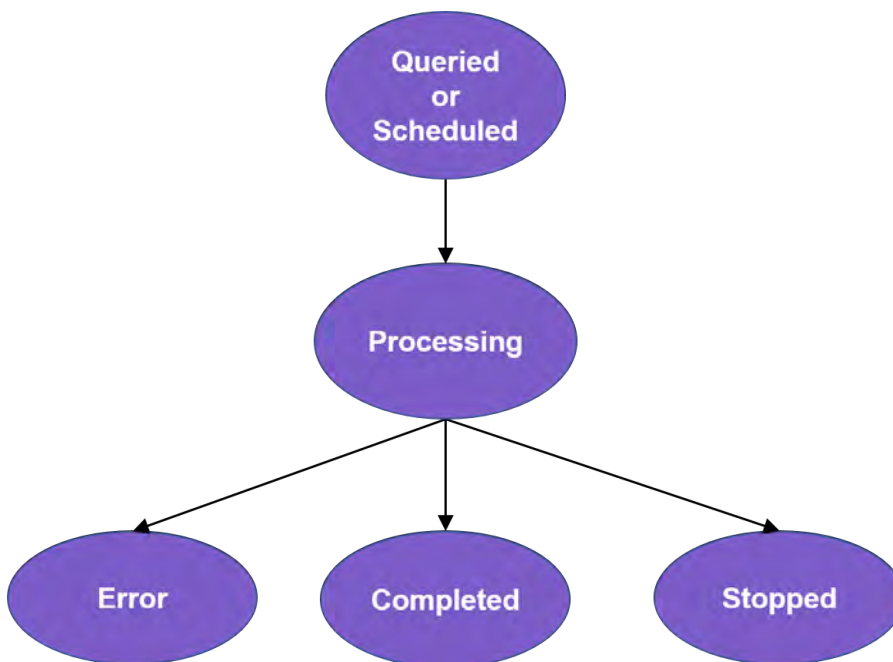
5. The user can review the details and fix it.

Understand job status

After you define a message, it goes into the job queue and you can monitor its status on the Communication Jobs page.

Communication job status

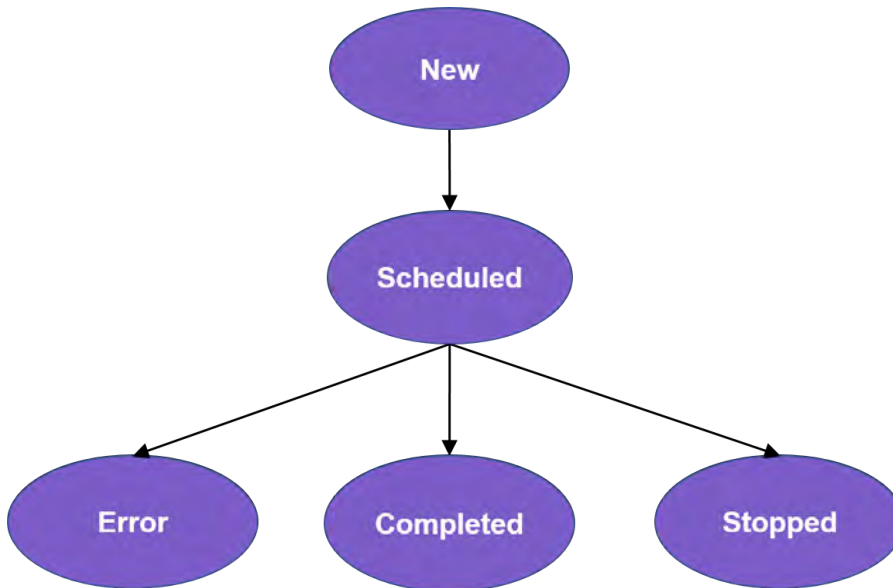
You can view the status of one-time communication messages on the **Communication Jobs** page. The following picture shows the status progression a message can take.



Status	Description
Queued	Job is waiting to be processed.
Scheduled	Job is scheduled to run at a future date and time.
Processing	Job is executing.
Completed	Job successfully completed processing.
Error	Job was not able to run due to errors.
Stopped	A user stopped the job.
(!) Alert icon	Indicates that certain communication items encountered errors while processing the job. To view the error, open the job detail.

Communication Recurrent Message job status

You can view the status of recurrent messages on the Recurrent Messages tab of the **Communication Jobs** page. The following picture shows the status progression a recurrent message can take.



Status	Description
New	Recurrent message has been created, but has not been executed.
Scheduled	Recurrent message has been executed at least once, but all occurrences have not run.
Completed	All occurrences of the recurrent message have successfully completed processing.
Error	No occurrences of the were able to run due to errors.
Stopped	A user stopped the recurrent message. Some occurrences of the message may have complete before the user stopped it.
(!) Alert icon	Indicates that certain occurrences of the recurrent message encountered errors while processing.

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 77 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`.

Search Criteria	Result
Full Banner ID	Finds all communications for the Banner ID with the exact matching ID.
Search string	Finds all communications for all Banner IDs that contain the specified search string. Example: The search string 71 finds communications for Banner IDs A00071000 and A71038593.

Search Criteria	Result
% or * wildcard	<p>Finds all communications for all Banner IDs that contain the specified characters.</p> <p>Example: The following search strings find communications for all Banner IDs that contain the characters 308.</p> <ul style="list-style-type: none"> • %308 • 308% • %308% • *308 • 308* • *308*
? or _ wildcards	<p>Finds all communications for all Banner IDs that contain the specific number of characters.</p> <p>Example: The search strings A12?????62 and A12_____62 find all communications for all Banner IDs that start with A12, followed by any four characters, followed by 62.</p>

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.

Search Criteria	Result
Full Banner ID	Finds the constituent with the exact matching Banner ID.
Search string	Finds all constituent names or IDs that contain the specified search string. Example: The search string <code>Smith</code> finds constituents with a first or last name Smith.
% or * wildcard	Finds all constituent names or IDs that contain the specified characters. Example: The following search strings find all constituents that contain the characters <code>smi</code> <ul style="list-style-type: none"> • <code>%smi</code> • <code>smi%</code> • <code>%smi%</code> • <code>*smi</code> • <code>smi*</code> • <code>*smi*</code>

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:** 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.

Search Type	Result
Full interaction type name	Finds the interaction type with the exact matching name.
Search string	<p>Finds all interaction type names that contain the specified search string.</p> <p>Example: The search string <code>college</code> finds interaction types that are named College Night and College Fair.</p>
% or * wildcard	<p>Finds all interaction types that contain the specified characters.</p> <p>Example: The following search strings find all query names that contain the characters <code>appointment</code>.</p> <ul style="list-style-type: none"> • <code>%appointment</code> • <code>appointment%</code> • <code>%appointment%</code> • <code>*appointment</code> • <code>appointment*</code> • <code>*appointment*</code>

Search Type	Result
? or _ wildcards	<p>Finds all interaction type names that contain the specific number of characters.</p> <p>Example: The search strings <code>housing????assignments</code> and <code>housing___assignments</code> find all query names that start with <code>housing</code>, followed by any four characters, followed by <code>assignments</code>.</p>
<p>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 <code>sp^&\$r</code> becomes <code>spr</code>.</p>	

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

- If you have an application administrator role (COMMUNICATIONADMIN), you can delete any interaction type.
- If you have an author role (COMMUNICATIONCONTENTADMIN), you can only delete an interaction type that you created.
- You must have an author role (COMMUNICATIONCONTENTADMIN) or an application administrator role (COMMUNICATIONADMIN) to delete 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 at your institution. Your institution can have multiple organizations. Organizations allow your institution to send communications from various departments within the institution. You generate communications through for one of your defined organizations.

requires the following organization information to send email communications:

- Organization name
- Outgoing email server
- Mailbox accounts

requires the following organization information 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 you are applying Fine Grained Access Control (FGAC) 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 **Organizations** 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.

-
- b) **Optional:** Enter the description.
 - c) **Optional:** Select the **Available for Display** check box to make the organization available for selection when sending a communication.
4. Enter Outgoing Email Settings.
Refer to [Set up the outgoing email server](#) on page 88 for more information.
 5. Enter Email Account Settings.
Refer to [Set up the mailbox accounts](#) on page 89 for more information.
 6. Enter Mobile Notification Settings.
Refer to [Set up mobile notification settings](#) on page 90 for more information.
 7. Click **Save**.

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 **Organizations** 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.

Note: When the **Does Server require Authentication?** check box is cleared, the **Username** and **Password** fields for the reply-to mailbox and sender mailbox accounts will not be required.

- d) Select connection security.
6. Click **Save**.

Set up the mailbox accounts

You must set up two mailbox accounts. The "reply to" mailbox account is the account where recipients can send response messages. The "sender" mailbox account sends emails to recipients. You can define the "reply to" and "sender" mailbox accounts as the same or different 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 **Organizations** 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:

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 account information for the mailbox account that sends emails to recipients:

Field	Description
Username	The user name of the mailbox account that sends the emails.
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 **Organizations** 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**.

Email and mobile notifications server settings test

The Test Email and Test Mobile Notification features allow you to verify that the organization's email and notification server settings are configured properly.

To prevent delivery failure of a communication to your constituents, you can send a test email or test mobile notification to ensure that the server settings are correct before you send the communication.

Test email server settings

Use the Test Email feature to test the Outgoing Server and Email Account Server settings.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.

2. Select the **Organizations** tab.
3. Select an Organization when the **Organizations** page opens, then select **More**.
4. Select **Test Email** from the drop-down box.
A Test Email dialog box is displayed.
5. **Optional:** Click **Cancel** to cancel the email test and close the dialog box.
6. Enter a valid email address in the Email Address field and click **Send Email**
Banner Communication Management displays `Email Successfully Submitted` if the email test completes successfully.

If the Email Account Settings or Outgoing Email Server Settings are not configured correctly, an error message appears that displays the missing or incorrect settings.

7. Log onto the email account that the test email was sent to and verify that the test email was received.
8. Look for the email that contains the following text in the fields of the email.

Email field	Email field contains
Subject	BCM Test Email
From	<i>Organization</i> where <i>Organization</i> is the Organization Name on the Organizations page that sent the email
Message body	This is a test email from Banner Communication Management

Test mobile notification settings

Use the Test Mobile Notification feature to test the End Point URL and API Key settings.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organizations** tab.
If no organization is set up, you are prompted to create a root organization.
3. On the **Organizations** page, select an Organization, then select **More**.
4. Select **Test Mobile Notification** from the drop-down box.
5. **Optional:** Click **Cancel** to cancel the mobile notification test and close the dialog box.
6. At **Name or Banner ID**, click the arrow on the drop-down menu and start typing a name or Banner ID.
The search list filters as you type a name or Banner ID.
7. Select the user that you want to send the test notification to from the list in the drop-down menu.
8. Click **Send Mobile Notification**.
If the user has an External ID, the message, `Mobile Notification Submitted Successfully` appears.

If the user does not have an External ID, the notification fails and the message, `No external id found for this user. Cannot send mobile notification.` appears.

9. When the user receives notification that `Mobile Notification Submitted Successfully`, the user must verify that they received the notification.
10. Open the Mobile Application and look for the notification that contains the following text in the fields of the notification.

Notification field	Notification field contains
mobile headline	BCM Test Notification
Message body	This is a test mobile notification from Banner Communication Management - <i>Organization</i> where <i>Organization</i> is the Organization Name on the Organizations page that sent the notification.

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 **Organizations** 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 88 for more information.
7. **Optional:** Edit the mailbox account settings. Refer to [Set up the mailbox accounts](#) on page 89 for more information.
8. **Optional:** Edit the mobile notification settings. Refer to [Set up mobile notification settings](#) on page 90 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 **Organizations** 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 :

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:

Field	Description
Username	The user name of the mailbox account that sends the emails.
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 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 **Organizations** 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 **Organizations** 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 delete an organization.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Select the **Organizations** 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 Event Mappings

This section provides information describing event mapping and the various operations that you can perform on the event mapping entity.

Note: For more information about configuring events in the Employee Self service Timesheet application, please refer to the *Banner Time Entry Handbook*

What is an event mapping?

Event Mappings enable alternate sources (for example: Employee Self service Timesheet) to trigger communications to their constituents. The event mapping entity associates a template and an organization to an Event.

Only users with the administrator role can manage this entity. Use the Event Mapping tab in the System Functions section of the application to manage events.

An event mapping with a System Created value of Yes implies that Ellucian delivered the data.

Only Active Events can trigger communications.

Search for an event mapping

You can access Event mappings in the System Functions section of the application under the Event Mapping tab. Selecting the Event Mapping tab displays the list of existing Event mappings in the system

About this task

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

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Click on the **Event Mapping** tab.
3. Enter the search string in the **Search by Event Name** field.
4. Refer to [Event mapping search criteria](#) on page 97 for details about the format of the search string.
5. Press **Enter** to display the search results.

Event mapping search criteria

You can use various search criteria to find an event.

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: An event name with the **System Created** column as `Yes` cannot be edited or deleted as it is a part of the seed data.

Search Criteria	Result
Full event name	Finds the event with the exact matching name.
Search string	Finds all event names that contain the specified search string. Example: The search string <code>office</code> finds events that are named Admissions Office and Financial Aid Office.
% or * wildcard	Finds all event names that contain the specified characters. Example: The following search strings find all event names that contain the characters <code>student</code> . <ul style="list-style-type: none"> • <code>%student</code> • <code>student%</code> • <code>%student%</code> • <code>*student</code> • <code>student*</code> • <code>*student*</code>
? or _ wildcards	Finds all event names that contain the specific number of characters. Example: The search strings <code>registrar????office</code> and <code>registrar__office</code> find all event names that start with <code>registrar</code> , followed by any four characters, followed by <code>office</code> .

Create an event mapping

Before you begin

You must have an application administrator role (COMMUNICATIONADMIN) to create a event mapping.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Click on the **Event Mapping** tab.
3. Click **Add**.
4. Enter the Event Name.
5. Select an Organization and templates from the list.
6. You can create an event as active or inactive.
Only active events can trigger communications.
7. Click **Save**.

Edit an event mapping

You can edit an existing Event Mapping.

Before you begin

You must have an application administrator role (COMMUNICATIONADMIN) to edit a event.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Click on the **Event Mapping** tab.
3. Scroll to or search for the Event that you want to edit, and select it.
4. Click **Open** or double-click on the selected row.
5. Click the **Edit** icon.
6. Edit one or more of the fields.
7. Click **Save**.

Delete an event mapping

You can delete an Event Mapping under certain conditions.

About this task

You must meet the following conditions to delete an Event Mapping:

- You must have an administrator role.
- The value in the **System Created** column is not *Yes* as it is part of the seed data.

You cannot delete an Event Mapping used for any communications.

Procedure

1. Click **System Functions** on the Banner Communication Management landing page.
2. Click on the **Event Mapping** tab.
3. Scroll to or search for the Event that you want to delete, and select it.
Alternatively, you can open the selected Event Mapping row.
4. Click **Delete**.
5. Click **Yes** to confirm.

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.

One suggestion is to create a folder for each administrative department that uses Banner Communication Management. You can optionally use Fine Grained Access (FGAC) to control which folders users can access.

FGAC is an Oracle feature that provides row-level security for Oracle tables. Value Based Security (VBS) is a Banner implementation of FGAC. VBS provides Banner rule forms that allow you to use SQL statements to restrict access to data, based on column values. When database rows are accessed for select, insert, update, or delete operations, VBS dynamically and transparently adds the institutionally defined restrictions to the WHERE clause. You can use VBS to control which Banner Communication Management folders users are authorized to access.

For example, you can define VBS rules to restrict users in the Financial Aid Office to the Banner Communication Management financial aid folders. When a user in the department accesses Banner Communication Management, FGAC transparently displays only those templates, data fields, queries, and populations in the folders that you authorized for the Financial Aid Office. You can restrict Admissions counselors to folders that are set up for the Admissions Office.

Refer to the *Banner General Data Security Handbook* for details on using FGAC and VBS. For additional details, refer to Salesforce Article 000021819

Note: FGAC is the only way to control user access by folder. Without FGAC, everyone can view the folders and other entities. The webtailor role associated with the user (COMMUNICATIONADMIN, CONTENT and USER) controls updates and deletions of entities like templates, populations, etc.

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 101 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.

Search Criteria	Result
Full folder name	Finds the folder with the exact matching name.
Search string	Finds all folder names that contain the specified search string. Example: The search string <code>office</code> 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 <code>student</code> . <ul style="list-style-type: none"> • <code>%student</code> • <code>student%</code> • <code>%student%</code> • <code>*student</code> • <code>student*</code> • <code>*student*</code>
? or _ wildcards	Finds all folder names that contain the specific number of characters. Example: The search strings <code>registrar????office</code> and <code>registrar__office</code> find all folder names that start with <code>registrar</code> , followed by any four characters, followed by <code>office</code> .

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** or double-click on the selected row.
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.