Banner Communication Management

Enterprise-wide communication tools
Ed Hauser
Director, Product Management
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Introduction

• This session will introduce you to the new Banner XE Communication Management application and demonstrate the features and function

• Benefits of attending
  • Understand the application features
  • Understand how it can be used to support departmental communications
  • Understand the time frame for delivery
  • Get a sense for how to begin using the application
Agenda

1. What is it?
2. How does it work?
3. How can I leverage it?
4. Release timeline
5. Wrap up and Q/A
Achieving student success advances our entire society.
Enhancing every aspect of the modern connected campus
Student Success

- Apply
- Register
- Degree Plan
- Monitor Progress
- Faculty Engagement
We will see...

<table>
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<tr>
<th>Ellucian XE for Banner</th>
<th>What is Communication Management</th>
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<td>Demonstration</td>
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<td>Discussion</td>
<td>Q &amp; A</td>
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</table>
We will see…

Ellucian XE for Banner

What is Communication Management

Demo

Demonstration

Discussion

Q & A
What is Communication Management for Banner?
Communication Management for Banner

Enables tactical and transaction related communications associated with administrative functions in Banner

Delivered as part of the core Banner suite of solutions

• Create, publish, send, and track communications for any person known to Banner
• Leverages existing Banner 8.x POPSEL
• Open source editor for communication content creation
• Letters, email, SMS*, Ellucian GO app

Designed under the Ellucian Extensible Ecosystem (XE) framework

• Provides choice and new methods of communicating to constituents in Banner
• Messaging enabled through Ellucian Go
• Can be used for any type of communications from letter generation to simple notifications of changes

* Indicates availability post general release
## Communication Management Architecture

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<td>Purchase Requisition</td>
</tr>
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</table>

**Oracle Database**
Development Partners

KENT STATE UNIVERSITY

Cuyahoga Community College

University of Victoria

Drexel University

TAMU UNIVERSITY

COLORADO COMMUNITY COLLEGE SYSTEM

An CHÉIM

Albion College

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What is Communication Management for Banner?
Features

Communication Type

• Email, PDF letters, SMS*, Ellucian GO message
• Anyone known to Banner
  • Person & non-person

Event triggered communication*

• Field value change triggers a specific communication*
• Embed the trigger in a communication template*

* Indicates availability post general release
Features, CONT.

Template Creation

- Embedded open source communication content editor (CK)
- HTML, images, font, color, size, paste from Word

Constituent Search

- SQL query builder
- Use POPSEL as basis for query
- Import & export populations from third party query tools, e.g. Cognos, Evisions*

* Indicates availability post general release
Features, CONT.

Publish

- Production, e.g. send to printer, email server, mobile app, portal, etc.
- One-off communication creation

Communication Tracking

- Date, time, department, sender, communication type, etc.
- Manual interaction tracking, e.g. student call to financial aid
Key Features Currently in Development

- **Scheduled Communications**
  - Ability to schedule a Communication for a point in time in the future

- **Mutual Exclusivity of Populations and Queries**
  - Foundation to support Population Import and WYSWYG front end

- **Versioning of Populations and Queries**
  - “Point in time” Population/Query

- **Interaction History**
  - Constituent View of all CM Communications for a specific constituent, including rendering of the actual communication

- **Manual Interactions**
  - Ability to manually enter interactions happening outside of CM
  - Ability to define interaction types (E.G. Phone calls, Meetings..etc)

- **Banner POPSEL**
  - Use of POPSEL population as exists at the time the communication is scheduled to be sent (immediately or a point in time in the future).. I.E. CM will not initiate new POPSEL query
How can I use Communication Management for Banner?
Communication Management

Used for any tactical and transactional communications at your institution

- Recruiting and Admissions
- Financial Aid Award Letters
- Registration reminders
- Advising reminders
- Employee notices
- Notification of account balances due
- Notification of direct deposit changes
- Fundraising and gift giving
- Event Management
Communication Management

Communications
Create personalized communication templates that can include text and graphics.

Populations
Send a communication to your selected group of constituents.

Queries
Create SQL queries to search the system to produce populations that meet the specified criteria.

Folders
Organize your schools' queries, populations, templates and data fields.

System Functions
Manage all the functions that work behind the scenes.
## Templates

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Folder</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>220158_2G_App_Ack</td>
<td>Graduate and Professional Admissions</td>
<td>Fall 2015 - Application Acknowledgement</td>
<td>Inactive</td>
</tr>
<tr>
<td>Building Notice</td>
<td>General</td>
<td>Emergency Notice</td>
<td>Active</td>
</tr>
<tr>
<td>Dean's letter for award winning individuals</td>
<td>Student</td>
<td>Letter for those individuals who received awards</td>
<td>Inactive</td>
</tr>
<tr>
<td>FA Award Letter 03/04/2015</td>
<td>FinAid</td>
<td>Financial Aid Award Letter for New Students</td>
<td>Inactive</td>
</tr>
<tr>
<td>Faculty Replacement Notice</td>
<td>Student</td>
<td>Letter for Faculty Replacement Notice</td>
<td>Inactive</td>
</tr>
<tr>
<td>Female Test Email-MIQ</td>
<td>General</td>
<td>Testing session female template</td>
<td>Active</td>
</tr>
<tr>
<td>General Notice to Female Students</td>
<td>General</td>
<td>General Notice to Female Students</td>
<td>Inactive</td>
</tr>
<tr>
<td>HI - Reminder to Submit Immun Records</td>
<td>HI</td>
<td>Reminder to Submit Immun Records</td>
<td>Active</td>
</tr>
<tr>
<td>Letter of Acceptance</td>
<td>Admissions</td>
<td>Acceptance Letter</td>
<td>Active</td>
</tr>
<tr>
<td>Math Invitation</td>
<td>Summer College</td>
<td>Summer College Math Invitation</td>
<td>Inactive</td>
</tr>
<tr>
<td>Missing Documentation</td>
<td>Registration</td>
<td>Template letter for individuals who have some missing documents</td>
<td>Inactive</td>
</tr>
<tr>
<td>Mv Template</td>
<td>X</td>
<td>Template description</td>
<td>Inactive</td>
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<tr>
<td>Academic_Standing1</td>
<td>Student</td>
<td>Term Academic Standing</td>
<td>Production</td>
</tr>
<tr>
<td>Advisor</td>
<td>Student</td>
<td>Primary Advisor</td>
<td>Development</td>
</tr>
<tr>
<td>City_Mailing_Address</td>
<td>Person</td>
<td>City for Mailing address</td>
<td>Production</td>
</tr>
<tr>
<td>City_Permanent</td>
<td>Person</td>
<td>City for Permanent Residence</td>
<td>Production</td>
</tr>
<tr>
<td>Date_Current</td>
<td>General</td>
<td>System date</td>
<td>Production</td>
</tr>
<tr>
<td>Email_Parent</td>
<td>Person</td>
<td>Parents email as defined in Banner</td>
<td>Development</td>
</tr>
<tr>
<td>Email_Preferred</td>
<td>Person</td>
<td>Preferred email as defined in Banner</td>
<td>Production</td>
</tr>
<tr>
<td>First_Name1</td>
<td>Person</td>
<td>First Name</td>
<td>Production</td>
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<tr>
<td>First_Name2</td>
<td>Person</td>
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<td>Gender</td>
<td>Person</td>
<td>Gender</td>
<td>Development</td>
</tr>
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<td>GPA</td>
<td>Student</td>
<td>Term GPA</td>
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<tr>
<td>GraduationYear</td>
<td>Alumni</td>
<td>GraduationYear</td>
<td>Development</td>
</tr>
</tbody>
</table>
Important Student Health Information

To

Subject

Message

[Blank message area]
Important Student Health Information

Overview

Email Content

To

$Email_Campus$

Subject

Important Student Health Information

Data Fields

- Student
- General
- Admissions
- Housing
- Person
- Humanities
- City_Mailing_Address
- City_Permanent
- Email_Campus
- Email_Preferred
- First_Name
- Last_Name

Message

Dear $First_Name$


Important Student Health Information

Overview

Email Content

To
$Email_Campus$

Subject
Important Student Health Information

Message

Dear $First_Name$ $Last_Name$

Student Health 101

The college has partnered with Student Health 101, a national online resource for college students designed to provide timely and relevant information about holistic health practices. The monthly magazine addresses topics across areas of physical health, mental wellness, fiscal responsibility, healthy interpersonal relationships, career development, and more.

To sign up for this free online magazine click

Thank-you

Tricia Ross - Health Director
854-225-1254
To: campusemail@ellucian.com  
Subject: Important Student Health Information

Dear John Smith,

Student Health 101

The college has partnered with Student Health 101, a national online resource for college students designed to provide timely and relevant information about holistic health practices. The monthly magazine addresses topics across areas of physical health, mental wellness, fiscal responsibility, healthy interpersonal relationships, career development, and more.

To sign up for this free online magazine click [here](https://ellucian.com/student-health).

Thank-you

Tricia Ross - Health Director
854-225-1254
Message to Ellucian Go
Specify the Type of Message: Mobile Notification

```latex
\begin{table}
\centering
\begin{tabular}{|l|l|l|l|}
\hline
Template Name & Folder & Description & Type & Status \\
\hline
123 Testing Mobile Notifications & BANNER-Folder1 & This template is to test Mobile Notification & Mobile Notification & Active \\
\hline
Building Notice & General & Emergency Notice & Email & Active \\
\hline
Dean's letter for award winning individuals & Student & Letter for those individuals who receive & Email & Active \\
\hline
Faculty Replacement Notice & Student & Letter for Faculty Replacement Notice & Email & Active \\
\hline
Letter of Acceptance & Admissions & Acceptance Letter & Email & Active \\
\hline
Missing Documentation & Registration & Template letter for individuals who have & Email & Active \\
\hline
Open Enrollment Reminder Notice & HR & Open Enrollment Reminder Notice & Email & Active \\
\hline
Open House & Recruiting & Letter to the applicants for attending the Open House & Email & Active \\
\hline
\end{tabular}
\end{table}
```
Define Mobile Notification Content

Student Hold Reminder

Mobile Headline: Hold Reminder

Headline: John you have holds on your account

Message Description: Please log into your account and take care of the following holds that have been placed on your account: Parking Fine

Destination URL: https://www.uvic.ca

Destination Label: Login Here

Expires:

- No Expiration
- Elapsed Time
- By Date

- Push Alert shows when not logged into the application
- Sticky (Alert cannot be dismissed inside the application)
Create the message content

# Student Hold Reminder

<table>
<thead>
<tr>
<th>Overview</th>
<th>Mobile Notification Content</th>
</tr>
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<tbody>
<tr>
<td>Mobile Headline</td>
<td>Hold Reminder</td>
</tr>
<tr>
<td>Headline</td>
<td>$First_Name$ you have holds on your account</td>
</tr>
<tr>
<td>Message Description</td>
<td>Please log into your account and take care of the following holds that have been placed on your account: $Hold_Notification$</td>
</tr>
<tr>
<td>Destination URL</td>
<td><a href="https://www.uvic.ca">https://www.uvic.ca</a></td>
</tr>
<tr>
<td>Destination Label</td>
<td>Login Here</td>
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Set Message Expiration Parameters

Student Hold Reminder

Message Description
Please log into your account and take care of the following holds that have been placed on your account: $Hold_Notification$

Destination URL
https://www.uvc.ca

Destination Label
Login Here

Expires
- No Expiration
- Elapsed Time
- By Date

- Push (Alert shows when not logged into the application)

- Sticky (Alert cannot be dismissed inside the application)
Save the Template for future use

Create Message

Communication Job Name *
Student Hold Reminder - September 2019

Organization *
Ellucian University - Root Organization

Population Name *
Mobile Query

Template Name *
11111 - Template for testing email
11111 - Template for testing Mobile Notification
123 Testing Mobile Notifications

Send

Cancel
User Experience through Ellucian Go
## Operational Benefits

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<th>Banner XE</th>
<th>Improved upgrade process</th>
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<td>Improved student satisfaction</td>
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<td>Screen Images</td>
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Release Timeline
# Architecture

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Oracle Database
A phased approach to release

Controlled Release 9.0
Q2 2015

Controlled Release 9.1
Q4 2015

General Release
Q3 2016
## Operational Benefits

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**Q/A**

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Questions?
Summary

- Communication Management is a core Banner solution
- Transaction based communications for all people known to Banner
- Built on the XE architecture
- Usability is key to success
- Development partner driven
- No additional license fee or maintenance fees
- Currently in controlled release
- General Release Q3 2016
Thank You!

ellucian

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Director, Product Management
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