Train the Trainer:
Implementing Communication Management 9x
March 2023
Agenda

• What is Banner Communication Management (BCM)?
• Where is the documentation?
• How to get help?
• What is needed to configure and set-up BCM? (Technical/Functional)
• Track, view and identify BCM communications
• Gotchas and Limitations
• What tasks can a user perform?
• Live Demo
• Willing to share experiences about BCM?
Single Sign-On Health Check

- Perform Single Sign-On (SSO) health check with all 3rd party vendors
- Test with vendors to ensure no impact on student’s ability to seamlessly move from Banner to vendor websites
  - Take payments
  - Sign up for payment plans
  - Sign up for housing
- Including but not limited to:
  - Touchnet
  - Cashnet
  - Nelnet
  - Star Rez
- Confirm successful SSO prior to Production
How to get help?

• ITS Helpdesk ticket for GeorgiaBEST team
  – Implementing functionality
  – Self-Service questions
  – Subscribe to a listserv

• If Ellucian expertise required, we will open an Ellucian Customer Center case
Where is the documentation?

GeorgiaBEST website

Banner 9

What is Banner 9?

The design principles focus on usability, enhanced functions, app configuration over customization of code, extensibility and scalability. When institutions adopt Banner 9, they will see improved usability, new functionality, responsive design, a custom look and a reduction in the cost of ownership.
Where is the documentation?

• Need an Ellucian Customer Center account?
  – https://login.ellucian.com/
  – Click “Sign up for an account”

• Ellucian Customer Center > Resources > Documentation > All Products to access Ellucian Documentation, then use Product A-Z to filter for Banner

Communication Management

Develop and strengthen student relationships with personalized communications and campaigns.

Download it!
Where is the documentation?

- Login to the Ellucian Customer Center
  - Choose Resources
  - Knowledge Header
    - Training
    - Search for Banner Communication Management
# Web Tailor Functions in Banner Self-Service 9 Channel

## Banner 8 Web Tailor Functions in Self-Service Banner 9

<table>
<thead>
<tr>
<th>What?</th>
<th>Where?</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Audit for Banner Self-Service Logins</td>
<td>GUACONF</td>
<td>Video <a href="#">Display Audit Records</a>, Documentation <a href="#">Banner Self-Service Auditing Feature</a>, Article <a href="#">Banner 9 Self-Service Auditing</a></td>
</tr>
<tr>
<td>Graphic Customizations</td>
<td>Theme Editor</td>
<td>Video <a href="#">Ellucian Theme Editor Use</a>, Documentation <a href="#">Ellucian Theme Editor Handbook</a>, Article <a href="#">Steps to Use Theme Editor with Self-Service</a></td>
</tr>
<tr>
<td>Information Text</td>
<td>GUAINFO</td>
<td>Video <a href="#">Edit Information Text</a>, Documentation <a href="#">Banner Self-Service Information Text</a></td>
</tr>
<tr>
<td>User Roles</td>
<td>GUUSRL</td>
<td>Video <a href="#">Add and Delete User Roles</a>, Documentation <a href="#">Maintain Self-Service User Roles</a>, Article <a href="#">How to Create a New Role for Banner Self-Service</a></td>
</tr>
<tr>
<td>Web Rules and Parameters</td>
<td>GUACONF</td>
<td>Video <a href="#">Create and Modify Web Rules and Parameters</a>, Documentation <a href="#">Self-Service Rules</a>, <a href="#">Self-Service Parameters</a>, Article <a href="#">Web Tailor 9x Administrative Pages for Self-Service</a></td>
</tr>
<tr>
<td>Web Tailor Overrides</td>
<td>Configure Page Components Tool</td>
<td>Documentation <a href="#">Configure Page Components Tool</a>, Article <a href="#">What Extensibility Tools Are Available for Banner 9x?</a></td>
</tr>
</tbody>
</table>
Where is the documentation?

- **000045207** – BCM – Configuration for displays of options (Timing) for Recurring Scheduling of messages
- **000032971** – Steps to setup and Test the Communication Management Application
- **CR-000169359** – CKEditor allows user to select the special character $ but BCM will not save content
- **000050317** – BCM testing Templates -- Test Email -- gets -- Problem creating message. Check to make sure template is formatted properly without special characters and all data fields are valid
- **CR-000167543** – BCM Manually Added Profiles search feature unusable for large populations
What is it? Banner Communication Management (BCM)

• Banner Communication Management (BCM) is a communication tool associated with administrative functions in Banner
  – Utilizes emails, letters or mobile SMS messaging
• It is delivered as a part of baseline Banner
• Provides institutions with flexibility and options to communicate with students that can be tracked
What Security configurations are needed? (Technical)

Add Security Roles

- Run a select statement from Article 000032971 to ensure the roles are granted
- Authorize BANPROXY
- Example Results for userid = Xxxxxxxxxxx
  - Xxxxxxxxxxx--CMQUERY--BAN_DEFAULT_CMQUERY_M--
  - Xxxxxxxxxxx--CMQUERY--BAN_DEFAULT_CMQUERY_M--BAN_CMQUERY_C
  - Xxxxxxxxxxx--CMQUERYEXECUTE--BAN_DEFAULT_M--
What Security configurations are needed? (Functional)

Maintain Self-Service User Roles (GUAUSRL)

Web Tailor Administrator will assign roles based on the user access needed

- **COMMUNICATIONADMIN**
  Communication Management Administrator
  Application administrator: Perform actions on all entities

- **COMMUNICATIONCONTENTADMIN**
  Communication Management Content Administrator
  Author role: Perform actions on self-created entities

- **COMMUNICATIONUSER**
  Communication Management User
  End user role: Perform actions on self-created entities
What Security configurations are needed? (Functional)

**Maintain Self-Service User Roles (GUAUSRL)**

Web Tailor Administrator will assign roles based on the user access needed.

![Image of role assignment dashboard](image)
What Security configurations are needed? (Technical)

Run a select statement from Article 000032971 to ensure the needed roles are granted in Web Tailor Administration for Banner Communication Management.
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

- **KB000500749** - SSB9x Platform 9.39 June 2022 changes to config values for configJob and applicationPageRoleJob impacting GUACONF
  - Changes take 30 minutes to 1 hour for updates to be discoverable
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

– Application ID = BCM
– Application Name = Communication Management
Banner Applications Configurations (GUACONF)

BCM = Communication Management

- Click Configurations tab
- Filter = %recurring%
  - Configuration Value = true
What configurations are needed?  
(Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SSS = General SSB App
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App
- Click Configurations tab
- Filter = BCM%
  - Configuration Value = Institution’s URL

![Banner Applications Configurations GUACONF screenshot](image)
What configurations are needed? (Functional)

Banner Applications Configurations (GUACONF)

GENERAL_SS = General SSB App
- Click Configurations tab
- Filter = GENERAL%
  - Configuration Value = Institution’s URL
Track, View and Identify BCM Communications

• Communications sent from BCM
  – Table for tracking Banner Mail (GURMAIL)

• View communications
  – Mail Query (GUIMAIL)
  – Associate the CM_COMM_ITEM letter code which identifies a communication sent from BCM in the template setup
Gotchas and Limitations

- Time out happens frequently
- Name search does not work in the population add page
- Population Selections cannot be shared
- Create your own from a copied population selection in GLRSLCT
  - Population Selections created from queries do not regenerate unless GLBDATA has been run first
### What tasks can a user perform?

<table>
<thead>
<tr>
<th>Entity</th>
<th>COMMUNICATIONADMIN role</th>
<th>COMMUNICATIONCONTENTADMIN role</th>
<th>COMMUNICATIONUSER role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizations</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View</td>
</tr>
<tr>
<td>Folders</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View</td>
</tr>
<tr>
<td>Parameters</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View, Add, Edit, Delete, Copy</td>
<td>List, View</td>
</tr>
<tr>
<td>DataFields</td>
<td>List, View, Add, Edit, Delete, Copy, Publish, Test, Archive</td>
<td>List, View, Add, Edit, Delete, Copy, Publish, Test</td>
<td>List, View, Test</td>
</tr>
<tr>
<td>Templates</td>
<td>List, View, Add, Edit, Delete, Copy, Publish, Test</td>
<td>List, View, Add, Edit, Delete, Copy, Publish, Test</td>
<td>List, View</td>
</tr>
<tr>
<td>Queries</td>
<td>List, View, Add, Edit, Delete, Copy, Generate Population</td>
<td>List, View, Add, Edit, Delete, Copy, Generate Population</td>
<td>List, View, Generate Population</td>
</tr>
<tr>
<td>Populations</td>
<td>List, View, View All, Add, Edit, Delete, Copy, Recalculate population, Share population</td>
<td>List, View, Add, Edit, Delete, Copy, Recalculate population, Share population</td>
<td>List, View, Add, Recalculate population</td>
</tr>
<tr>
<td>Communications (Now, Scheduling and Recurrent)</td>
<td>Send, List, View, View All, Add, Edit recurrent communications</td>
<td>Send, List, View, Edit only for Recurrent Communications</td>
<td>Send, List, View, Edit only for Recurrent Communications</td>
</tr>
<tr>
<td>Communication Log</td>
<td>List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Error Log</td>
<td>List, View Error Detail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Mapping</td>
<td>List, View, Add, Edit, Delete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
BCM Live Demo
Access Communication Management

- Click on Banner General Self-Service
- Click on Action Items Administration
Access Communication Management

- Click on Manage Folders, Populations and Queries
## User-friendly Landing page

### Communication Management

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>Send messages and manage communications.</td>
</tr>
<tr>
<td>Populations</td>
<td>Send a communication to your selected group of constituents.</td>
</tr>
<tr>
<td>Templates, Datafields and Parameters</td>
<td>Create personalized communication templates that can include text, graphics and datafields.</td>
</tr>
<tr>
<td>Folders</td>
<td>Organize your schools' queries, populations, templates and data fields.</td>
</tr>
<tr>
<td>Interactions</td>
<td>View Interaction History for a constituent and manage interaction types.</td>
</tr>
<tr>
<td>Logs</td>
<td>View the communication and error logs.</td>
</tr>
<tr>
<td>System Functions</td>
<td>Manage all the functions that work behind the scenes.</td>
</tr>
</tbody>
</table>
System Functions
(COMMUNICATIONADMIN) user
- Create root Organization
- Add new Organization
- Edit
- Copy
- Delete
- (::) Test email server
System Functions
- Create Root Organization then test
BCM Live Demo

Test Email

- Check the email entered to ensure you received the communication from the test performed

This is a test email message from the Banner Communication Management Application.
Folders – System Delivered (CM_XXX)

- Click Add
- Copy > Edit > Delete options appear
- Folders can not be deleted once used
BCM Live Demo

Folders

- Open > Copy > Add
- System delivered folders can be copied and then renamed
- Add a new folder
- Show/Hide columns and Search option
Templates - Delete

- 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.
## Templates

![Template Management Interface]

### Communication Management > Templates

<table>
<thead>
<tr>
<th>Templates</th>
<th>Data Fields</th>
<th>Parameters</th>
</tr>
</thead>
</table>

- **Template Name**:
- **Folder**:
- **Description**:
- **Type**:
- **Status**:
- **System Created**

**Actions:**
- Open
- Copy
- Add
- Delete
BCM Live Demo

Templates Letter Content
- Click Templates, Data Fields, and Parameters
- Click Add
- Enter data about the template then Save
- Select Letter Content tab
- Click Edit
- Enter the “To” field
- Click “Insert Data Fields”
- Click Save
- Click Publish
- Create Message
Templates

- Enter Template Name
- Enter Description
- Choose the Folder system delivered or locally created
- Choose Communication Method
  - Choose (Email > Letter > SMS > Mobile Notification)
- Created by will appear (user in the application)
- Choose the Valid From date
- Choose the Valid To date or leave blank
- Choose if you ‘Would like to share this template”
  - Click the radio button for No or Yes
- Save
Templates

[Diagram showing a template creation interface with fields for Template Name, Description, Folder, Communication Method, Created By, Valid From/To, and a question about sharing the template.]

Save
# BCM Live Demo

## Templates

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Folder</th>
<th>Description</th>
<th>Type</th>
<th>Status</th>
<th>System Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>USG_Demo_Template_Letter</td>
<td>CM_Student</td>
<td>USG_Demo_Template_Letter</td>
<td>Letter</td>
<td>Active</td>
<td>No</td>
</tr>
<tr>
<td>USG_Demo_Template_Email</td>
<td>CM_Student</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>Active</td>
<td>No</td>
</tr>
</tbody>
</table>
BCM Live Demo

Templates – Add
- Click on Template > Open > Copy > Edit > Delete

Communication Management  •  Templates

Templates

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Folder</th>
<th>Description</th>
<th>Type</th>
<th>Status</th>
<th>System Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>USG_Demo_Template_Letter</td>
<td>CM_Student</td>
<td>USG_Demo_Template_Letter</td>
<td>Letter</td>
<td>Active</td>
<td>No</td>
</tr>
<tr>
<td>USG_Demo_Template_Email</td>
<td>CM_Student</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>Active</td>
<td>No</td>
</tr>
</tbody>
</table>
Templates – Overview

- Create Message > Copy > Edit > Delete > : (Test)
Templates – Letter Content

- Create Message > Copy > Edit > Delete > (Test)
- Insert Data Fields for Names, Banner ID, etc.
## Templates – Page Settings

- Edit page settings as needed

### Communication Management → Templates → Open Template

#### USG_Demo_Template_Letter

<table>
<thead>
<tr>
<th>Overview</th>
<th>Letter Content</th>
<th>Page Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dimension Unit</td>
<td>Inch</td>
<td></td>
</tr>
<tr>
<td>Top</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Bottom</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Left</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Right</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Page Size</td>
<td>Letter (8.5in x 11in)</td>
<td></td>
</tr>
</tbody>
</table>

- Create Message
- Copy
- Edit
- Delete
Templates – Email Content

- Create Message > Copy > Edit > Delete > : (Test)
- Click Edit to enter in email content
Templates/Email Content

- Click Insert Data Fields > ensure your cursor is in the ‘To’ field
Templates Email Content

- Click Insert Data Fields in ‘To’ field
- Enter Subject > Message
  - Enter your greeting > choose Insert Data Field again > then select Data Field
  - Save > Publish > ensure the template is successfully published
Templates Email Content TEST

- Choose the three-dot menu (⋮) to test

- Enter Email Code from
  - GTVEMAL

- Enter ID

- Send
Templates – Add Parameters to Data Fields

- Review list of delivered Parameters

- Example
  - Click on CM_termcode
  - Click Open
  - Click Highlight Parameter Name chosen
  - Click Ctrl + C
  - Go back to Data Fields
  - Click Add
Templates - Datafields – System Delivered
- Add Data Fields as needed
- Add Parameters to Data Fields
**Templates – System delivered Parameters**

- Add Parameters as needed

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Title</th>
<th>Type</th>
<th>System Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM_addressasofdate</td>
<td>Date for which an active address has to be determined</td>
<td>Date</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_addressstype</td>
<td>Address type of the address</td>
<td>Text</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_aidyearcode</td>
<td>Financial aid year</td>
<td>Text</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_emailcode</td>
<td>Email code associated with the Email address</td>
<td>Text</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_holdsasofdate</td>
<td>Date to determine the holds on a person's record</td>
<td>Date</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_mailingaddress</td>
<td>Address type of the address to be used for mailing</td>
<td>Text</td>
<td>Yes</td>
</tr>
<tr>
<td>CM_termcode</td>
<td>Term code</td>
<td>Text</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Templates – Add Parameters to Data Fields

- Paste or Ctrl + V enter in the Field Name and update it to your needs
- Enter Description
- Choose the Folder
- Click Save
Queries

- Click Add
- Enter Query Name “your_choice”
- Enter Description “your_choice”
- Choose the drop-down box and select folder name
- Select Type radio button (SQL or Population Selection)
- Enter Query Select Statement or PopSel (remember to run popsels through GLBDATA)
- Click Validate
- Click Save
BCM Live Demo

Queries

- Click Add
- Enter Query Name: “your_choice”
- Enter Description: “your_choice”
**Queries - Add**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Query Name</strong></td>
<td>USG_Demo_SQL</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>USG_Demo_SQL</td>
</tr>
<tr>
<td><strong>Folder Name</strong></td>
<td>CM_Student</td>
</tr>
<tr>
<td><strong>Creator</strong></td>
<td>JLOVEJOY</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Production</td>
</tr>
<tr>
<td><strong>Published Date</strong></td>
<td>Mar 22, 2028 10:36:25 AM</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>SQL Statement</td>
</tr>
<tr>
<td><strong>Query Statement</strong></td>
<td>select SPRIDEN_PIOM from SPRIDEN where SPRIDEN_LAST_NAME='Lovejoy' and SPRIDEN_CHANGE_IND is NULL</td>
</tr>
</tbody>
</table>
### BCM Live Demo

**Queries > Publish**

![BCM Demo](BCM_DemoPopSel1)

**Communication Management > Queries > Open Query**

- **BCM_DemoPopSel1**

<table>
<thead>
<tr>
<th><strong>Query Name</strong></th>
<th>BCM_DemoPopSel1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>BCM_DemoPopSel1</td>
</tr>
<tr>
<td><strong>Folder Name</strong></td>
<td>BCM_DemoFolder1</td>
</tr>
<tr>
<td><strong>Creator</strong></td>
<td>JLOVEJOY</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Development</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Population Selection Extract</td>
</tr>
</tbody>
</table>

**Population Selection Extract**

<table>
<thead>
<tr>
<th><strong>Application</strong></th>
<th>STUDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selection ID</strong></td>
<td>LAST_NAME</td>
</tr>
<tr>
<td><strong>Creator ID</strong></td>
<td>JLOVEJOY</td>
</tr>
<tr>
<td><strong>User ID</strong></td>
<td>JLOVEJOY</td>
</tr>
</tbody>
</table>
BCM Live Demo

- Click Publish
- Click Generate Population
- Enter the name of the population
- Enter a description for the population
- Click radio button “Always use the latest published version of the query”
- Click radio button “Yes” if you want to share this population
- Click Generate
Manually Added Profiles

- Add from File
- Add to enter the Name or the ID of the student(s)
<table>
<thead>
<tr>
<th>Population Name</th>
<th>Folder Name</th>
<th>Status</th>
<th>Results</th>
<th>Created or Generated Date</th>
<th>Shared</th>
</tr>
</thead>
<tbody>
<tr>
<td>USG_Demo_PopSQL</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 22, 2023 10:38:00 AM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_PopSQL1</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 21, 2023 04:42:00 PM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_SQL1</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 21, 2023 04:26:00 PM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_PopSQL2</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 21, 2023 11:55:00 AM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo3</td>
<td>BCM_DemoFolder1</td>
<td>Available</td>
<td>9</td>
<td>Mar 21, 2023 10:00:00 AM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_PopLetter1</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 20, 2023 03:06:00 PM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_Letter1</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 20, 2023 02:51:00 PM</td>
<td>Yes</td>
</tr>
<tr>
<td>Demo_PopSQL1</td>
<td>CM_Student</td>
<td>Available</td>
<td>9</td>
<td>Mar 20, 2023 03:28:00 PM</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Results found: 19
Communication - Jobs Queued
BCM Live Demo

Communication Jobs - Processing

Communication Job Summary: Processing
Start/Scheduled Date: Mar 21, 2023 08:45:18 AM
Job Started On: Mar 21, 2023 08:46:00 AM
Job Ended On:
Population Name: Demo_PopSQL1
Population Size: 9
Template Name: BCM_DemoEmail1
Type: Email
Data Field Parameters:
- Email code associated with the Email address: STU
Organization: ITS_GeorgiaBEST_University
Creator: JLOVEJOY

Group Send Summary (Please refresh the page to view updated results):
- Completed Items: 0
- Processing Items: 9
- Error Items: 0
- Stopped Items: 0
Total Items: 9

Search by Name or ID: [Search by Status]

<table>
<thead>
<tr>
<th>Name</th>
<th>Banner ID</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lovejoy, Jennifer</td>
<td>9130266916</td>
<td>Processing</td>
<td>Mar 21, 2023 08:46:00 AM</td>
<td></td>
</tr>
<tr>
<td>Lovejoy, Jackie</td>
<td>9130266666</td>
<td>Processing</td>
<td>Mar 21, 2023 08:46:00 AM</td>
<td></td>
</tr>
</tbody>
</table>
BCM Live Demo

Communication Jobs - Completed

**BCM_DemoJob2**

**Communication Job Summary**
- **Completed**
- **Start/ Scheduled Date**: Mar 17, 2023 01:56:38 PM
- **Job Started On**: Mar 17, 2023 01:57:00 PM
- **Job Ended On**: Mar 17, 2023 01:57:00 PM
- **Population Name**: BCM_PopSQL2
- **Population Size**: 1
- **Template Name**: BCM_DemoTemplate2
- **Type**: Email
- **Data Field Parameters**: Email code associated with the Email address STU
- **Organization**: ITS_GeorgiaBEST_University
- **Creator**: JLOVEJOY

**Group Send Summary**
- **Completed items**: 1
- **Processing items**: 0
- **Error items**: 0
- **Stopped items**: 0
- **Total Items**: 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Banner ID</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lovejoy, Jackie</td>
<td>913265307</td>
<td>Completed</td>
<td>Mar 17, 2023 01:57:00 PM</td>
<td>Mar 17, 2023 01:57:00 PM</td>
</tr>
</tbody>
</table>
Communication - Jobs Completed

- Review Alert!

<table>
<thead>
<tr>
<th>Alert</th>
<th>Job Status</th>
<th>Job Name</th>
<th>Start/ Scheduled Date</th>
<th>Population Name</th>
<th>Template Name</th>
<th>Channel</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Completed" /></td>
<td>Completed</td>
<td>USG_Demo_JobL</td>
<td>Mar 22, 2023 10:45:16 AM</td>
<td>USG_Demo_PopSQL</td>
<td>USG_Demo_Template_Letter</td>
<td>Letter</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
<tr>
<td><img src="Image" alt="Completed" /></td>
<td>Completed</td>
<td>USG_Demo_JobE</td>
<td>Mar 22, 2023 10:42:51 AM</td>
<td>USG_Demo_PopSQL</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
</tbody>
</table>
Interactions by Student
- Date, Channel, Type, Folder, etc.
- Interaction history/administrative view
Interactions - Interaction Type
- Add

Interaction Types

- Communication Management
  - Interaction Types

Interaction Types

- Name: Manual_Letter1
  - Description: Manual_Letter1
  - Folder: CM_Student
  - Available For Use: Yes
## Logs – Error Log by Date and Student

### Error Log

<table>
<thead>
<tr>
<th>Date</th>
<th>Banner ID</th>
<th>Name</th>
<th>Reason for Failure</th>
<th>Initiated By</th>
<th>Template Name</th>
<th>Type</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 22, 2023 10:43:03 AM</td>
<td>913214049</td>
<td>Lovejoy, Sherry</td>
<td>No recipient email address exists</td>
<td>JLOVEJOY</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
<tr>
<td>Mar 21, 2023 04:34:02 PM</td>
<td>913214049</td>
<td>Lovejoy, Sherry</td>
<td>No recipient email address exists</td>
<td>JLOVEJOY</td>
<td>Demo_Template_Email1</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
<tr>
<td>Mar 21, 2023 08:46:02 AM</td>
<td>913214049</td>
<td>Lovejoy, Sherry</td>
<td>No recipient email address exists</td>
<td>JLOVEJOY</td>
<td>BCM_DemoEmail1</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
</tbody>
</table>
### Communication Log

**Communication Logs**

<table>
<thead>
<tr>
<th>Date</th>
<th>Banner ID</th>
<th>Name</th>
<th>Initiated By</th>
<th>Template Name</th>
<th>Type</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 22, 2023 10:43:03 AM</td>
<td>913255307</td>
<td>Lovejoy, Jackie</td>
<td>JLOVEJOY</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
<tr>
<td>Mar 22, 2023 10:31:06 AM</td>
<td>913255307</td>
<td>Lovejoy, Jackie</td>
<td>JLOVEJOY</td>
<td>USG_Demo_Template_Email</td>
<td>Email</td>
<td>ITS_GeorgiaBEST_University</td>
</tr>
</tbody>
</table>

**Logs – Communication Log by Student**
Ask your peers

- Helpful hints
- Lessons learned

Self-reported implementation status

- Banner 9 Implementation Grid
Ask your peers

• If you have implemented...
  – Level and speed/ease of user acceptance (students, staff & faculty)
  – Share helpful hints or gotchas
  – Willing to share your plan

• If you have not implemented yet...
  – Plan or timeframe for testing, implementing, training
  – Concerns or hurdles
More training sessions coming soon

<table>
<thead>
<tr>
<th>Topic</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Registration</td>
<td>Wednesday, January 25, 2023</td>
</tr>
<tr>
<td>Page Builder</td>
<td>Wednesday, February 8, 2023</td>
</tr>
<tr>
<td>Faculty Self-Service</td>
<td>Wednesday, February 22, 2023</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>Wednesday, March 8, 2023</td>
</tr>
<tr>
<td>Communication Management</td>
<td>Wednesday, March 22, 2023</td>
</tr>
<tr>
<td>Proxy Management</td>
<td>Wednesday, April 5, 2023</td>
</tr>
<tr>
<td>Student Self-Service</td>
<td>Wednesday, April 19, 2023</td>
</tr>
<tr>
<td>Action Item Processing</td>
<td>Wednesday, May 3, 2023</td>
</tr>
</tbody>
</table>