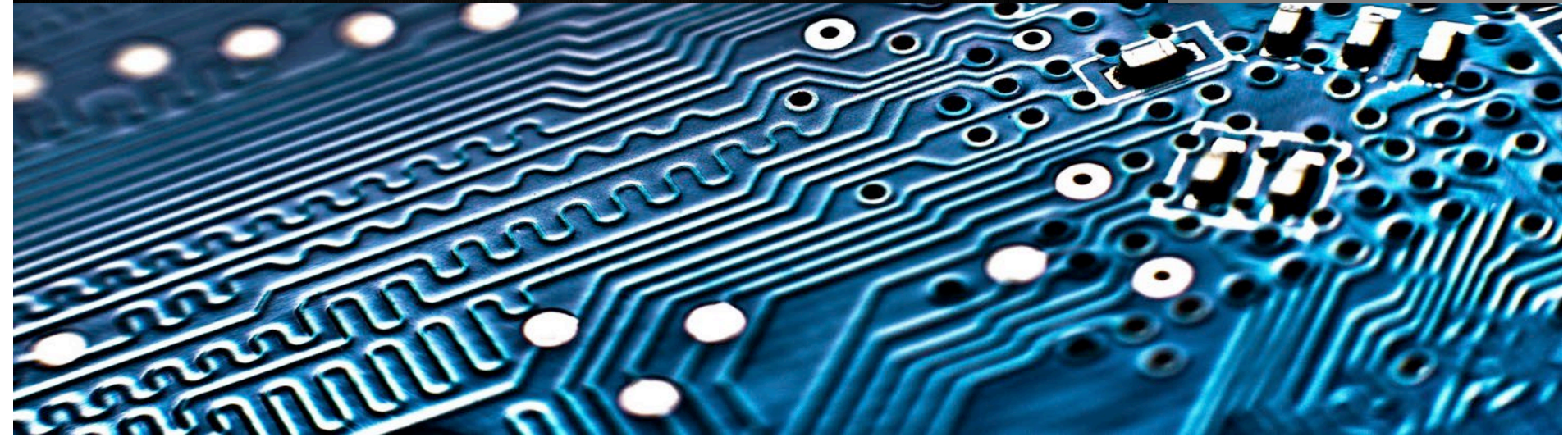


UNIVERSITY SYSTEM OF GEORGIA  
Information Technology Services

# 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** 3<sup>rd</sup> 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

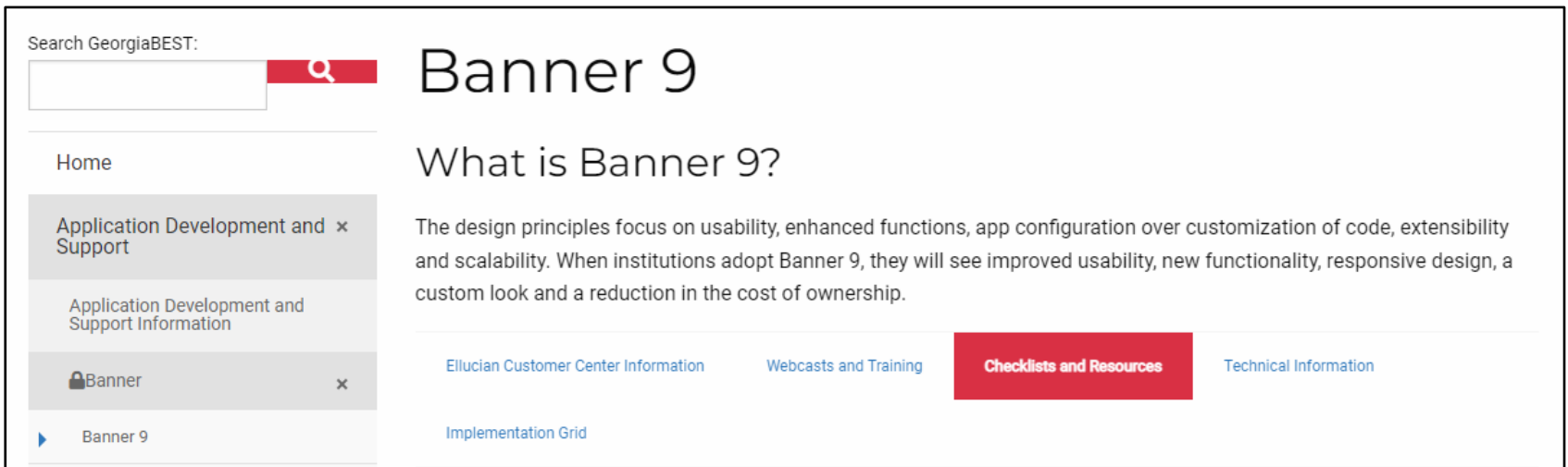
# How to get help?

- 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



The screenshot shows the GeorgiaBEST website interface. At the top left, there is a search bar labeled "Search GeorgiaBEST:" with a red search button. Below the search bar is a navigation menu with "Home" and "Banner" (with a close icon). The main content area features the heading "Banner 9" and the sub-heading "What is Banner 9?". A paragraph of text describes the design principles of Banner 9. Below the text is a horizontal navigation bar with four links: "Elucian Customer Center Information", "Webcasts and Training", "Checklists and Resources" (highlighted in red), and "Technical Information". At the bottom left of the main content area, there is a link for "Implementation Grid".

# 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

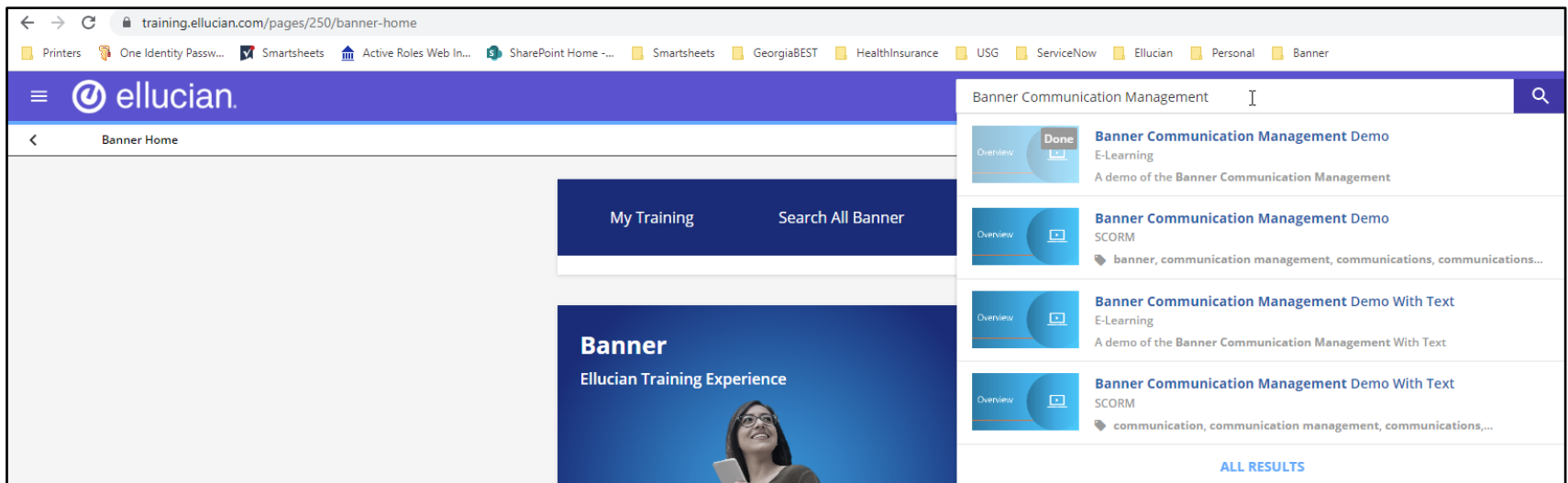
## Communication Management

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



















The screenshot displays the Ellucian Customer Center interface. The browser address bar shows the URL [training.ellucian.com/pages/250/banner-home](https://training.ellucian.com/pages/250/banner-home). The page features a navigation menu with the Ellucian logo and a search bar containing the text "Banner Communication Management". Below the search bar, there are several search results for "Banner Communication Management Demo". The results include:

- Banner Communication Management Demo** (E-Learning): A demo of the Banner Communication Management.
- Banner Communication Management Demo** (SCORM): banner, communication management, communications, communications...
- Banner Communication Management Demo With Text** (E-Learning): A demo of the Banner Communication Management With Text.
- Banner Communication Management Demo With Text** (SCORM): communication, communication management, communications,...

The page also includes a "Banner Home" section with a "My Training" button and a "Search All Banner" button. A large banner at the bottom right features the text "Banner Ellucian Training Experience" and an image of a woman smiling.

# Web Tailor Functions in Banner Self-Service 9 Channel

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

What? Function formerly performed in Web Tailor	Where? Where to find this function in Self-Service Banner 9	Resources
Display Audit for Banner Self-Service Logins	GUACONF	 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>
Graphic Customizations	Theme Editor	 Video   <a href="#">Ellucian Theme Editor Use</a>  Documentation   <a href="#">Ellucian Theme Editor</a>   <a href="#">Theme Editor Handbook</a>  Article   <a href="#">Steps to Use Theme Editor with Self-Service</a>
Information Text	GUAINFO	 Video   <a href="#">Edit Information Text</a>  Documentation   <a href="#">Banner Self-Service Information Text</a>
LDAP Administration and Login Return Location	Single Sign On (SSO) Configuration	 Handbook   <a href="#">Banner Single Sign-On Handbook</a>  Documentation   <a href="#">Configure Banner General Self-Service SSO</a>  Documentation   <a href="#">Banner Configuration for CAS SSO</a>
User Roles	GUAUSRL	 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>
Web Menus and Procedures	GUASMNU	 Videos   <a href="#">Menu Tree</a>   <a href="#">Proxy Menu</a>   <a href="#">Global Proxy</a>   <a href="#">Delete Proxy Pgs.</a>  Documentation   <a href="#">Manage Self Service Menus</a>  Article   <a href="#">How to Configure the Banner 9 Menu for Self-Service</a>  Article   <a href="#">General Self-Service Global Proxy Access Setup</a>
Web Rules and Parameters	GUACONF	 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>
Web Tailor Overrides	Configure Page Components Tool	 Documentation   <a href="#">Configure Page Components Tool</a>  Article   <a href="#">What Extensibility Tools Are Available for Banner 9x?</a>



# 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 = XXXXXXXXXX
  - XXXXXXXXXX--CMQUERY--BAN\_DEFAULT\_CMQUERY\_M--
  - XXXXXXXXXX--CMQUERY--BAN\_DEFAULT\_CMQUERY\_M--BAN\_CMQUERY\_C
  - XXXXXXXXXX--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**

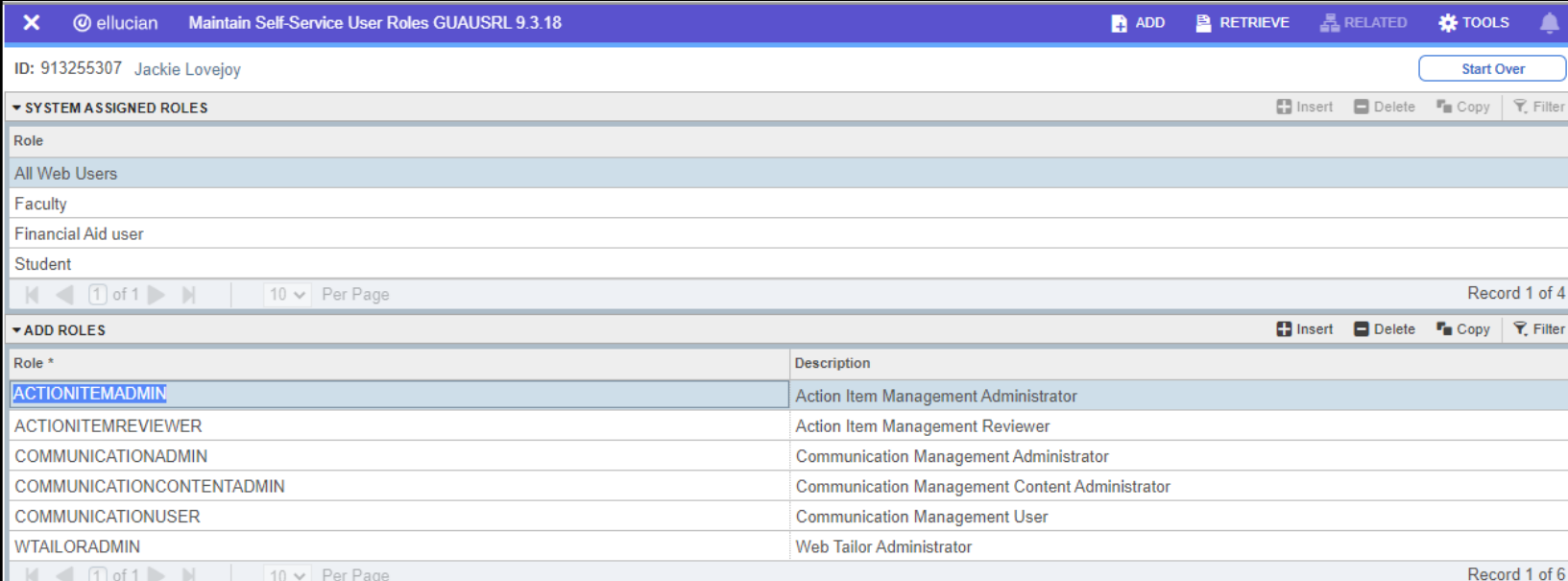
Communication Management User

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



The screenshot displays the 'Maintain Self-Service User Roles GUAUSRL 9.3.18' interface. At the top, the user 'ellucian' is logged in, and the user ID '913255307 Jackie Lovejoy' is shown. A 'Start Over' button is available. The interface is divided into two main sections: 'SYSTEM ASSIGNED ROLES' and 'ADD ROLES'.

**SYSTEM ASSIGNED ROLES**

Role
All Web Users
Faculty
Financial Aid user
Student

Record 1 of 4

**ADD ROLES**

Role *	Description
<a href="#">ACTIONITEMADMIN</a>	Action Item Management Administrator
ACTIONITEMREVIEWER	Action Item Management Reviewer
COMMUNICATIONADMIN	Communication Management Administrator
COMMUNICATIONCONTENTADMIN	Communication Management Content Administrator
COMMUNICATIONUSER	Communication Management User
WTAILORADMIN	Web Tailor Administrator

Record 1 of 6

# 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

☰	TWGRROLE_ROLE
▶	COMMUNICATIONADMIN
	COMMUNICATIONCONTENTADMIN
	COMMUNICATIONUSER

# What configurations are needed? (Functional)

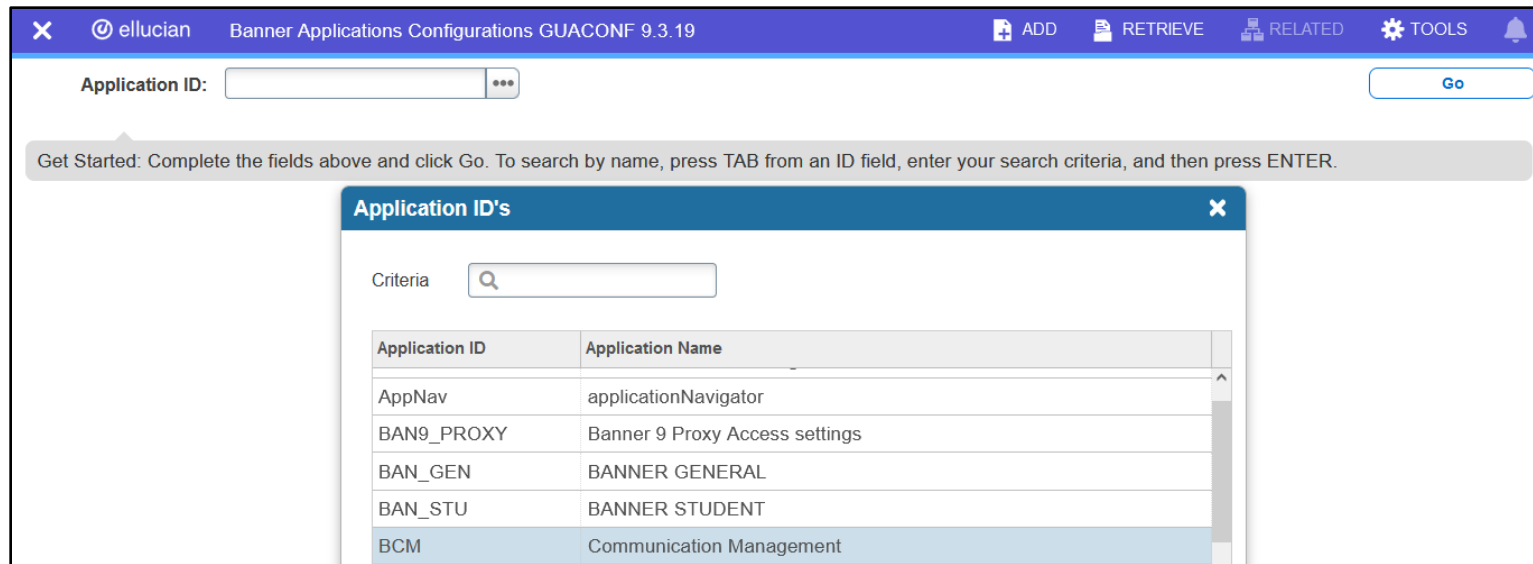
## Banner Applications Configurations (GUACONF)

- **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



Application ID:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

### Application ID's

Criteria

Application ID	Application Name
AppNav	applicationNavigator
BAN9_PROXY	Banner 9 Proxy Access settings
BAN_GEN	BANNER GENERAL
BAN_STU	BANNER STUDENT
BCM	Communication Management



# What configurations are needed? (Functional)

## Banner Applications Configurations (GUACONF)

BCM = Communication Management

- Click Configurations tab
- Filter = %recurring%
  - Configuration Value = true

Application ID: BCM Communication Management Start Over

Application Pages: Configurations | Self-Service Rules | Self-Service Parameters

▼ CONFIGURATIONS Insert Delete Copy Filter

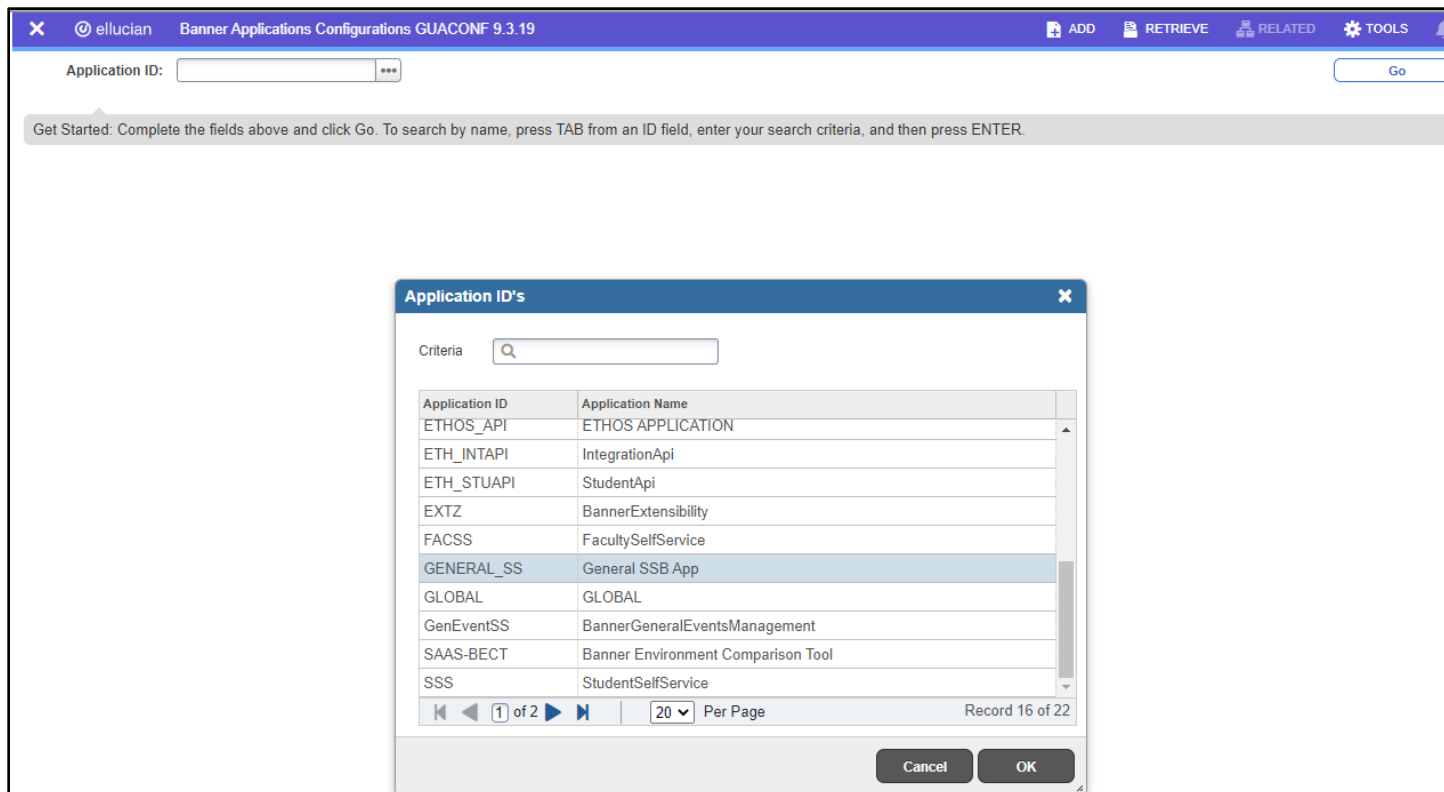
Active filters: Configuration Name: %recurring% Clear All Filter Again

Configuration Name	Configuration Type	Configuration Value	User Preference Indicator
communication.recurringScheduleOptions.enableAdvanced	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableDailySc...	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableHourly...	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableMinutes...	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableMonthly...	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableWeekly...	boolean	true	<input type="checkbox"/>
communication.recurringScheduleOptions.enableYearlyS...	boolean	true	<input type="checkbox"/>

# What configurations are needed? (Functional)

## Banner Applications Configurations (GUACONF)

GENERAL\_SS = General SSB App



The screenshot displays the Banner Applications Configurations GUACONF 9.3.19 interface. At the top, there is a search bar for "Application ID:" with a "Go" button. Below the search bar, a message reads: "Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER." A modal window titled "Application ID's" is open, showing a search criteria field and a table of application configurations. The table lists various application IDs and their names, with "GENERAL\_SS" and "General SSB App" highlighted. The table also includes pagination controls showing "1 of 2" pages and "20 Per Page" records, with "Record 16 of 22" displayed.

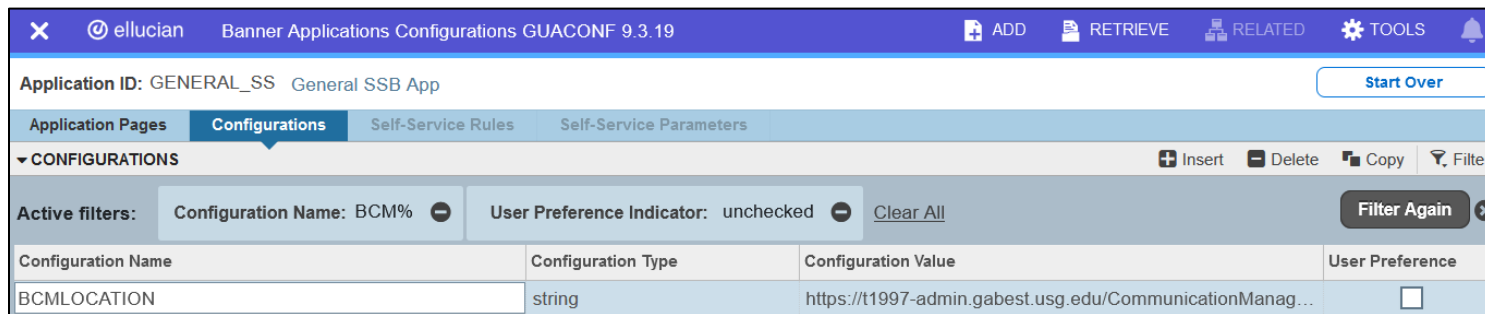
Application ID	Application Name
ETHOS_API	ETHOS APPLICATION
ETH_INTAPI	IntegrationApi
ETH_STUAPI	StudentApi
EXTZ	BannerExtensibility
FACSS	FacultySelfService
GENERAL_SS	General SSB App
GLOBAL	GLOBAL
GenEventSS	BannerGeneralEventsManagement
SAAS-BECT	Banner Environment Comparison Tool
SSS	StudentSelfService

# What configurations are needed? (Functional)

## Banner Applications Configurations (GUACONF)

GENERAL\_SS = General SSB App

- Click Configurations tab
- Filter = BCM%
- Configuration Value = Institution's URL



Application ID: GENERAL\_SS General SSB App [Start Over](#)

Application Pages: **Configurations** Self-Service Rules Self-Service Parameters

▼ CONFIGURATIONS [+](#) Insert [-](#) Delete [▢](#) Copy [🔍](#) Filter

Active filters: Configuration Name: BCM% [-](#) User Preference Indicator: unchecked [-](#) [Clear All](#) [Filter Again](#) [✕](#)

Configuration Name	Configuration Type	Configuration Value	User Preference
BCMLOCATION	string	https://t1997-admin.gabest.usg.edu/CommunicationManag...	<input type="checkbox"/>

# What configurations are needed? (Functional)

## Banner Applications Configurations (GUACONF)

GENERAL\_SS = General SSB App

- Click Configurations tab
- Filter = GENERAL%
- Configuration Value = Institution's URL

Application ID: GENERAL\_SS General SSB App Start Over

Application Pages: **Configurations** Self-Service Rules Self-Service Parameters

▼ CONFIGURATIONS + Insert - Delete 📄 Copy 🔍 Filter

Active filters: Configuration Name: GENERAL% ⊖ User Preference Indicator: unchecked ⊖ [Clear All](#) Filter Again ✕

Configuration Name	Configuration Type	Configuration Value	User Preference
GENERALLOCATION	string	https://t1997.gabest.usg.edu/BannerGeneralSsb/	<input type="checkbox"/>

# 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?

Entity	COMMUNICATIONADMIN role	COMMUNICATIONCONTENTADMIN role	COMMUNICATIONUSER role
Organizations	List, View, Add, Edit, Delete, Copy		
Folders	List, View, Add, Edit, Delete, Copy	List, View, Add, Edit, Delete, Copy	List, View
Parameters	List, View, Add, Edit, Delete, Copy	List, View, Add, Edit, Delete, Copy	List, View
DataFields	List, View, Add, Edit, Delete, Copy, Publish, Test, Archive	List, View, Add, Edit, Delete, Copy, Publish, Test	List, View, Test
Templates	List, View, Add, Edit, Delete, Copy, Publish, Test	List, View, Add, Edit, Delete, Copy, Publish, Test	List, View
Queries	List, View, Add, Edit, Delete, Copy, Generate Population	List, View, Add, Edit, Delete, Copy, Generate Population	List, View, Generate Population
Populations	List, View, View All, Add, Edit, Delete, Copy, Recalculate population, Share population	List, View, Add, Edit, Delete, Copy, Recalculate population	List, View, Add, Recalculate population
Communications (Now, Scheduling and Recurrent)	Send, List, View, View All, Add, Edit recurrent communications	Send, List, View, Edit only for Recurrent Communications	Send, List, View, Edit only for Recurrent Communications
Interactions	List, View, Add Manual Interaction, Edit Manual Interaction	List, View, Add Manual Interaction, Edit Manual Interaction	List, View, Add Manual Interaction, Edit Manual Interaction
Communication Log	List		
Error Log	List, View Error Detail		
Event Mapping	List, View, Add, Edit, Delete		

# BCM Live Demo





# BCM Live Demo

## Access Communication Management

- Click on Banner General Self-Service
- Click on Action Items Administration

The screenshot displays the BCM Live Demo interface. On the left is a dark grey navigation menu with a hamburger icon at the top. The menu items are: 'Back to Main Menu', 'Applications', 'Banner', 'My Banner', 'My Links', 'Banner Self-Service', 'Student Self-Service', and 'Banner General Self-Service'. The 'Banner General Self-Service' item is highlighted with a red rectangular box. The main content area has a purple header with the 'ellucian' logo and the text 'My Profile'. Below the header, the page title 'My Profile' is displayed. A greeting reads 'Hello Jackie Lovejoy, View, edit and update your general information records.' Below this, there are two white cards. The first card is titled 'Personal Information' and contains the text 'View and update your biographical and demographic information.' The second card is titled 'Action Items Administration' and contains the text 'Maintain Action Item system information'. This second card is also highlighted with a red rounded rectangular box.

## Access Communication Management

- Click on Manage Folders, Populations and Queries

ellucian

### Action Item Management

**Action Item Status**  
Define Action Item status and if the Action Item Status prevents a process.

**Action Items**  
Create and maintain Action Items.

**Post Action Items**  
Schedule and post Action items to a population.









**Manage Folders, Populations and Queries**  
Open Banner Communication Management to:  
- Set up folders for organizing Groups, Action Items and Populations.  
- Maintain populations and population queries for posting Action Items.

**Groups**  
Maintain titles and instruction for Groups and assign Action Items to a Group.

## User-friendly Landing page

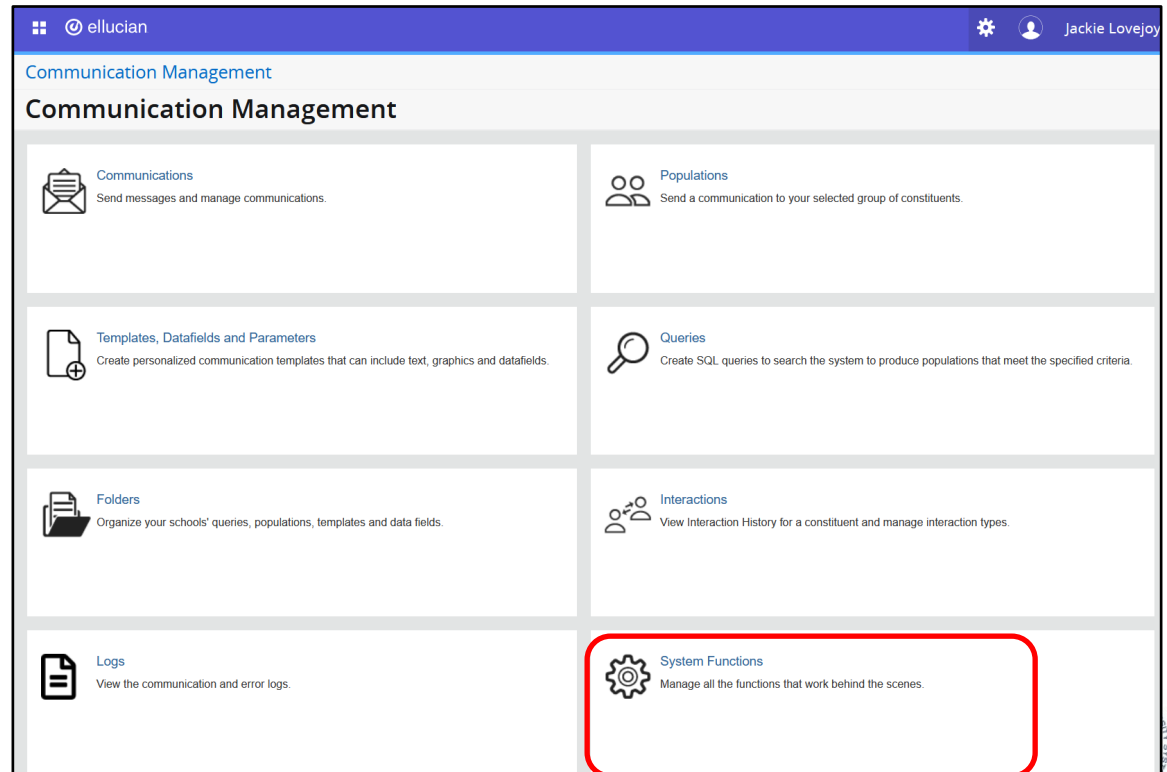
Communication Management

### Communication Management

 <p><b>Communications</b> Send messages and manage communications.</p>	 <p><b>Populations</b> Send a communication to your selected group of constituents.</p>
 <p><b>Templates, Datafields and Parameters</b> Create personalized communication templates that can include text, graphics and datafields.</p>	 <p><b>Queries</b> Create SQL queries to search the system to produce populations that meet the specified criteria.</p>
 <p><b>Folders</b> Organize your schools' queries, populations, templates and data fields.</p>	 <p><b>Interactions</b> View Interaction History for a constituent and manage interaction types.</p>
 <p><b>Logs</b> View the communication and error logs.</p>	 <p><b>System Functions</b> Manage all the functions that work behind the scenes.</p>

## System Functions (COMMUNICATIONADMIN) user

- Create root Organization
- Add new Organization
- Edit
- Copy
- Delete
- (: ) Test email server



## System Functions

- Create Root Organization then test

The screenshot displays the BCM interface for managing organizations. The breadcrumb trail at the top reads: [Communication Management](#) > [System Functions - Organizations](#) > [Root Organization](#). A toolbar in the top right corner, highlighted with a red box, contains the following actions: **Add New Organization** (with a plus icon), **Edit** (with a pencil icon), **Copy** (with a document icon), **Delete** (with a trash icon), and a vertical ellipsis menu icon.

The main content area is divided into three sections:

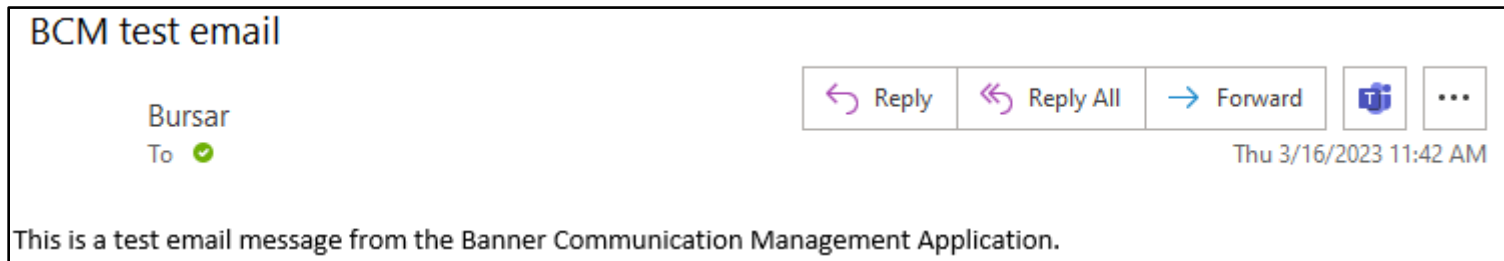
- General Settings:** Includes fields for **Organization Name** (ITS\_GeorgiaBEST\_University), **Description** (ITS GeorgiaBEST University), and a checkbox for **Organization is available for Display**.
- Outgoing Email Server Settings:** Includes fields for **Server Host Name**, **Port**, and a checkbox for **Server does not require Authentication**. The **Connection Security** is set to **None**.
- Email Account Settings:** Divided into two columns:
  - Reply To Mailbox Account:** Includes **Email Address** and **Display Name** (Do Not Reply).
  - Sender Mailbox Account:** Includes **Email Address** and **Display Name** (Bursar).

A **Test Email** dialog box is overlaid on the right side, also highlighted with a red box. It contains the text: "This is a test email from Banner Communication Management - ITS\_GeorgiaBEST\_University". Below this is a field for **Email Address \*** with the placeholder text "enter email address". At the bottom right of the dialog are **Cancel** and **Send** buttons.

# BCM Live Demo

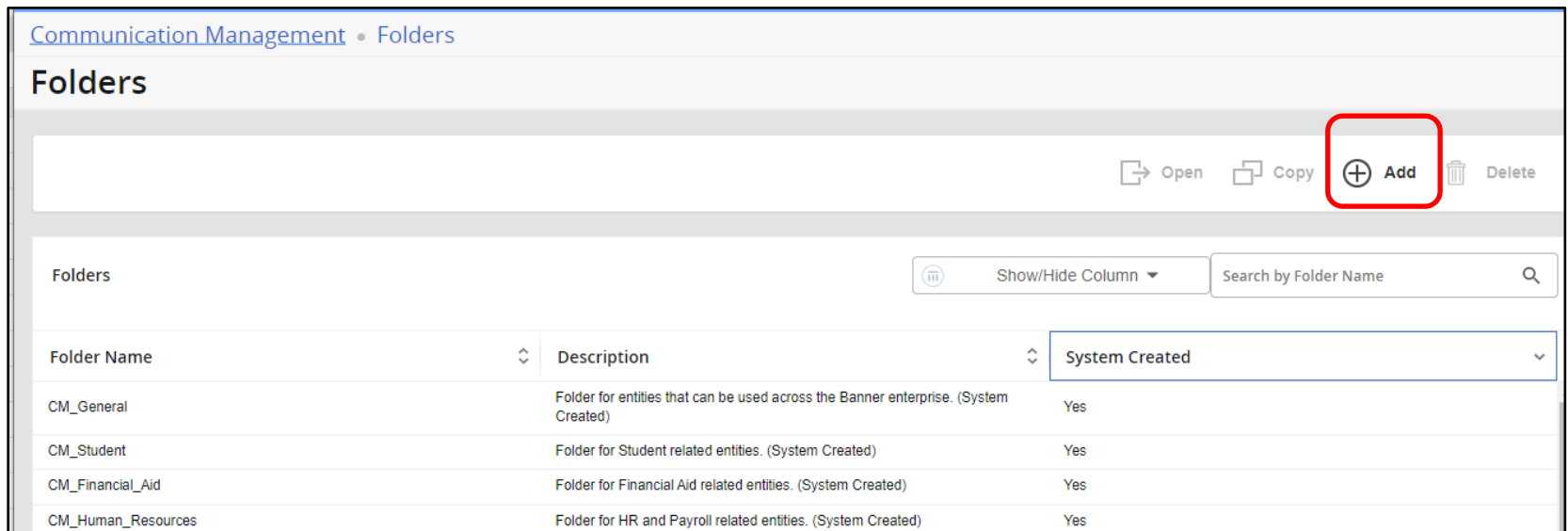
## Test Email

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



## Folders – System Delivered (CM\_XXX)

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



Communication Management • Folders

### Folders

Open Copy **Add** Delete

Folders Show/Hide Column Search by Folder Name

Folder Name	Description	System Created
CM_General	Folder for entities that can be used across the Banner enterprise. (System Created)	Yes
CM_Student	Folder for Student related entities. (System Created)	Yes
CM_Financial_Aid	Folder for Financial Aid related entities. (System Created)	Yes
CM_Human_Resources	Folder for HR and Payroll related entities. (System Created)	Yes




# 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

[Communication Management](#) • [Folders](#)

### Folders

 Open  Copy  Add

 Show/Hide Column  

Folder Name	Description	System Created
CM_Financial_Aid	Folder for Financial Aid related entities. (System Created)	Yes
CM_General	Folder for entities that can be used across the Banner enterprise. (System Created)	Yes
CM_Human_Resources	Folder for HR and Payroll related entities. (System Created)	Yes
CM_Student	Folder for Student related entities. (System Created)	Yes





## 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

[Communication Management](#) • [Templates](#)

### Templates

**Templates**    Data Fields    Parameters

Open    Copy    **Add**    Delete

Templates    Show/Hide Column    Search By Template Name

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

## 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

[Communication Management](#) • [Templates](#) • [Add Template](#)

### Add Template

**Template Name \***

**Description**

**Folder \***

**Communication Method**  
 Email  Letter  SMS  Mobile Notification

**Created By** JLOVEJOY

**Valid From**

**Valid To**

**Would you like to share this template?**  
 No  Yes

## Templates

Communication Management • Templates

### Templates

Templates    Data Fields    Parameters

Open    Copy    Add    Delete

Templates    Show/Hide Column    Search By Template Name

Template Name	Folder	Description	Type	Status	System Created
USG_Demo_Template_Letter	CM_Student	USG_Demo_Template_Letter	Letter	Active	No
USG_Demo_Template_Email	CM_Student	USG_Demo_Template_Email	Email	Active	No



## Templates – Add

- Click on Template > Open > > Copy > Edit > Delete

Communication Management • Templates

### Templates

Templates    Data Fields    Parameters

Open    Copy    Add    Delete

Templates    Show/Hide Column    Search By Template Name

Template Name	Folder	Description	Type	Status	System Created
USG_Demo_Template_Letter	CM_Student	USG_Demo_Template_Letter	Letter	Active	No
USG_Demo_Template_Email	CM_Student	USG_Demo_Template_Email	Email	Active	No

## Templates – Overview

- Create Message > Copy > Edit > Delete > : (Test)

The screenshot displays the 'Communication Management' interface for a template. The breadcrumb trail is 'Communication Management > Templates > Open Template'. The main title is 'USG\_Demo\_Template\_Letter'. A toolbar contains icons for 'Create Message', 'Copy', 'Edit', 'Delete', and a menu icon. Below the toolbar are three tabs: 'Overview', 'Letter Content', and 'Page Settings'. The 'Overview' tab is active and shows the following details:

- Template Name:** USG\_Demo\_Template\_Letter
- Description:** USG\_Demo\_Template\_Letter
- Folder Name:** CM\_Student
- Communication Method:** Letter
- Created By:** JLOVEJOY
- Valid From:** 03/22/2023
- Valid To:**
- Status:** Active

At the bottom, there is a question 'Would you like to share this template?' with a 'Yes' response, and a confirmation message 'Template has been published'.



# BCM Live Demo

## Templates – Letter Content

- Create Message > Copy > Edit > Delete > : (Test)
- Insert Data Fields for Names, Banner ID, etc.

The screenshot displays the BCM Live Demo interface for editing a letter template. The breadcrumb trail at the top reads 'Communication Management > Templates > Open Template'. The main title is 'USG\_Demo\_Template\_Letter'. Below the title is a toolbar with icons for 'Create Message', 'Copy', 'Edit', 'Delete', and a menu icon. The 'Letter Content' tab is selected, showing a 'To' field with the value 'Banner ID'. The 'Message' field contains the following text: 'Good morning First Name, This is a demonstration for a letter. Thanks, ITS GeorgiaBEST Team'. A rich text editor toolbar is visible above the message content, featuring options for source, undo, redo, bold, italic, underline, strikethrough, font color, background color, font size, and other formatting tools.

## Templates – Page Settings

- Edit page settings as needed

[Communication Management](#) • [Templates](#) • [Open Template](#)

### USG\_Demo\_Template\_Letter

Create Message Copy Edit Delete

Overview Letter Content **Page Settings**

<b>Margin</b>	
Dimension Unit	Inch
Top	1.00
Bottom	1.00
Left	1.00
Right	1.00
Page Size	Letter (8.5in x 11in)




## Templates/Email Content

- Click Insert Data Fields > ensure your cursor is in the 'To' field

[Communication Management](#) • [Templates](#) • [Open Template](#)

### BCM\_DemoEmail1

 Insert Data Fields

**Overview** | **Email Content**

To:

Subject:

Data Fields

CM_General	CM_Address_Street_Line0
CM_Human_Resources	CM_Address_Zip_Code
CM_Financial_Aid	CM_Banner_ID
CM_Student	CM_Current_Date
	CM_Email_Address
	CM_First_Last_Name
	CM_First_Name

## 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

Communication Management • Templates • Open Template

### USG\_Demo\_Template\_Email

Insert Data Fields

**Overview** **Email Content**

**To**

**Subject**

**Message**

Source | [Icons] | Format | Font | Size | A | B | I | U | S | Ix

Good morning \$CM\_First\_Name\$,  
This is a demonstration for an email.  
Thanks,  
ITS GeorgiaBEST Team

## Templates Email Content TEST

- Choose the three-dot menu (:)

The screenshot shows the BCM system interface. At the top, there is a breadcrumb trail: [Communication Management](#) • [Templates](#) • [Open Template](#). Below this, the title 'BCM\_DemoEmail1' is displayed. A toolbar contains icons for 'Publish', 'Copy', 'Edit', and 'Delete', followed by a three-dot menu icon highlighted with a red box. On the left, there is a sidebar with tabs for 'Overview' and 'Email Content'. Under 'Email Content', there are sections for 'To', 'Subject', and 'Message'. A modal dialog box titled 'Test Email Template' is open, containing the following fields and options:

- Send a test email using this template.
- Organization \* (Dropdown menu showing 'ITS\_GeorgiaBEST\_University')
- Data Field Parameters \*
  - Email code associated with the Email address (Text input field containing 'STU')
- Send message to (Text input field containing '913255307')

- Enter Email Code from
  - GTVEMAL
- Enter ID
- Send

# BCM Live Demo

## 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

# BCM Live Demo

## Templates - Datafields – System Delivered

- Add Data Fields as needed
- Add Parameters to Data Fields

[Communication Management](#) • [Data Fields](#)

### Fields

Templates   **Data Fields**   Parameters

Open Copy Add Delete

Data Fields   Show/Hide Column   Search By Data Field Name

Field Name	Folder	Description	Status	System Created
CM_Address_City	CM_General	Address - City	Production	Yes
CM_Address_City_State_Zip	CM_General	City, State and Zip code	Production	Yes
CM_Address_County	CM_General	Address - County	Production	Yes
CM_Address_Nation	CM_General	Address - Nation	Production	Yes
CM_Address_State	CM_General	Address - State	Production	Yes
CM_Address_Street_Line1	CM_General	Address - Street Line 1	Production	Yes
CM_Address_Street_Line2	CM_General	Address - Street Line 2	Production	Yes
CM_Address_Street_Line3	CM_General	Address - Street Line 3	Production	Yes

Results found: 32   Page 1 of 4   Per Page 10





# BCM Live Demo

## Templates – System delivered Parameters

- Add Parameters as needed

Communication Management • Parameters

### Parameters

Templates   Data Fields   **Parameters**

Open   Copy   Add   Delete

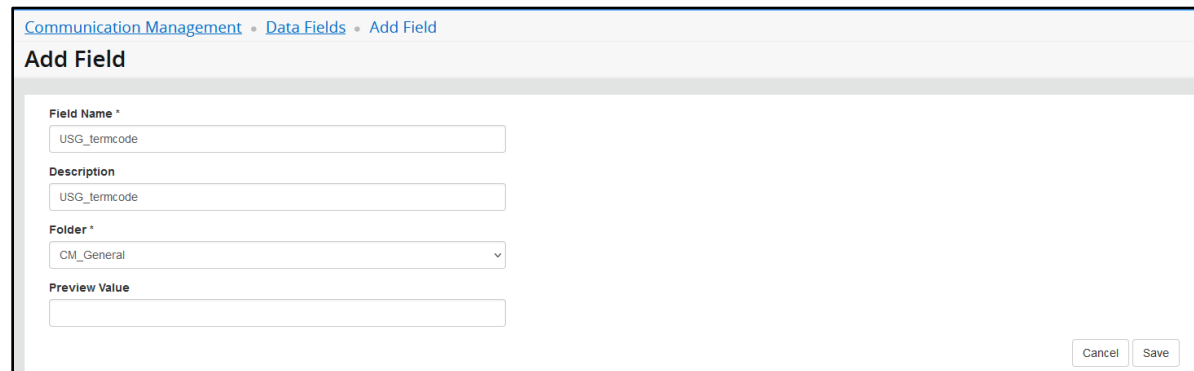
Parameters   Show/Hide Column   Search by Parameter Name

Parameter Name	Title	Type	System Created
CM_addressasofdate	Date for which an active address has to be determined	Date	Yes (BCM Live Demo)
CM_addresstype	Address type of the address	Text	Yes
CM_aidyearcode	Financial aid year	Text	Yes
CM_emailcode	Email code associated with the Email address	Text	Yes
CM_holdasofdate	Date to determine the holds on a person's record.	Date	Yes
CM_mailingaddressstype	Address type of the address to be used for mailing	Text	Yes
CM_termcode	Term code	Text	Yes



## 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



The screenshot shows a web interface for adding a new data field. The breadcrumb navigation at the top reads "Communication Management > Data Fields > Add Field". The form is titled "Add Field" and contains the following fields:

- Field Name \***: A text input field containing "USG\_termcode".
- Description**: A text input field containing "USG\_termcode".
- Folder \***: A dropdown menu with "CM\_General" selected.
- Preview Value**: An empty text input field.

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

# BCM Live Demo

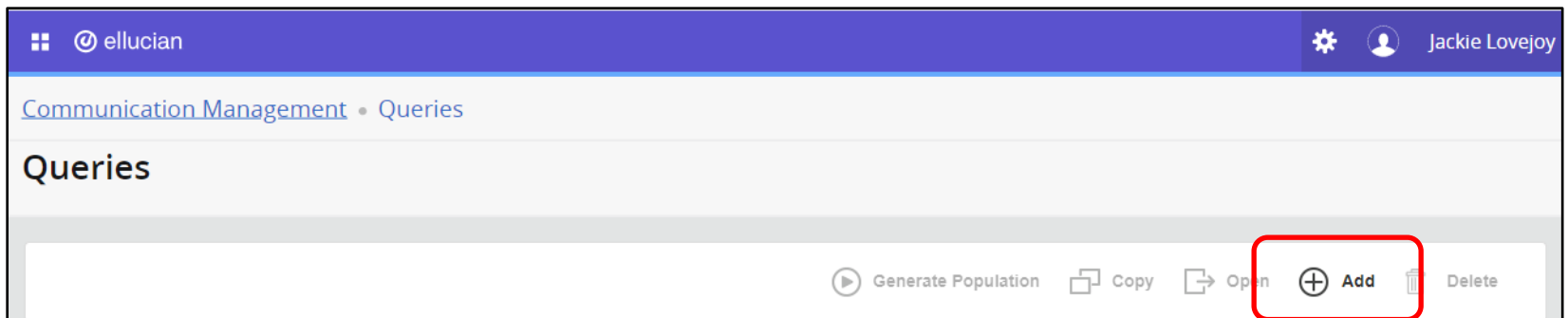
## Queries

- 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

[Communication Management](#) • [Queries](#) • [Open Query](#)

### USG\_Demo\_SQL

 Generate Population  Copy  Edit  Delete 

**Query Name**  
USG\_Demo\_SQL

**Description**  
USG\_Demo\_SQL

**Folder Name**  
CM\_Student

**Creator**  
JLOVEJOY

**Status**  
Production

**Published Date**  
Mar 22, 2023 10:36:25 AM

**Type**  
SQL Statement

**Query Statement**  
`select SPRIDEN_PIDM from SPRIDEN where SPRIDEN_LAST_NAME='Lovejoy' and SPRIDEN_CHANGE_IND is NULL`

## Queries > Publish

[Communication Management](#) • [Queries](#) • [Open Query](#) ✔ Save Successful

### BCM\_DemoPopSel1

Publish  Copy  Edit  Delete ⋮

---

**Query Name**  
BCM\_DemoPopSel1

**Description**  
BCM\_DemoPopSel1

**Folder Name**  
BCM\_DemoFolder1

**Creator**  
JLOVEJOY

**Status**  
Development

**Type**  
Population Selection Extract

**Population Selection Extract**

**Application**  
STUDENT

**Selection ID**  
LAST\_NAME

**Creator ID** JLOVEJOY

**User ID** JLOVEJOY



# 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)

Manually Added Profiles

Search by Name or ID

Add from File Add Remove Remove All

Name	Banner ID
------	-----------

<< < 1 of 0 > >> Per Page 20 Results 0






# BCM Live Demo

## Populations – Review all pages

[Communication Management](#) • Populations

### Populations

View All + Add 

Populations Show/Hide Column  Search By Population Name 

Population Name	Folder Name	Status	Results	Created or Generated Date	Shared
USG_Demo_PopSQL	CM_Student	Available	9	Mar 22, 2023 10:38:00 AM	Yes
Demo_PopSel1	CM_Student	Available	9	Mar 21, 2023 04:42:00 PM	Yes
Demo_SQL1	CM_Student	Available	9	Mar 21, 2023 04:26:00 PM	Yes
Demo_PopSQL2	CM_Student	Available	9	Mar 21, 2023 11:55:00 AM	Yes
Demo3	BCM_DemoFolder1	Available	9	Mar 21, 2023 10:00:00 AM	Yes
Demo_PopLetter1	CM_Student	Available	9	Mar 20, 2023 03:06:00 PM	Yes
Demo_Letter1	CM_Student	Available	9	Mar 20, 2023 02:51:00 PM	Yes
Demo_PopSQL1	CM_Student	Available	9	Mar 20, 2023 01:29:00 PM	Yes

Results found: 19

Page 1 of 2 Per Page 10



# BCM Live Demo

## Communication - Jobs Queued

Communication Management • Communication Jobs • Open Communication Job

Messages are being sent

### Demo\_JobLetter1

Stop Job Delete Job Refresh

**Communication Job Summary** Queued

**Start/ Scheduled Date** Mar 20, 2023 03:19:06 PM

**Job Started On**

**Job Ended On**

**Population Name** [Demo\\_Letter1](#)

**Population Size**

**Template Name** BCM\_Letter2

**Type** Letter

**Organization** ITS\_GeorgiaBEST\_University

**Creator** JLOVEJOY

**Group Send Summary**

**Completed Items**

**Processing Items** 0

**Error Items** 0

**Stopped Items** 0

**Total Items** 0

## Communication Jobs - Processing

[Communication Management](#) • [Communication Jobs](#) • [Open Communication Job](#)

### Demo3

Stop Job Delete Job Refresh

**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

Name	Banner ID	Status	Start Date	End Date
Lovejoy, Jennifer	913026016	Processing	Mar 21, 2023 08:46:00 AM	
Lovejoy, Jackie	913028666	Processing	Mar 21, 2023 08:46:00 AM	



## Communication Jobs - Completed

[Communication Management](#) • [Communication Jobs](#) • [Open Communication Job](#)

### BCM\_DemoJob2

[Stop Job](#) [Delete Job](#)

**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

Name	Banner ID	Status	Start Date	End Date
Lovejoy, Jackie	913255307	Completed	Mar 17, 2023 01:57:00 PM	Mar 17, 2023 01:57:00 PM



# BCM Live Demo

## Communication - Jobs Completed - Review Alert !

[Communication Management](#) • [Communication Jobs](#)

### Communication Jobs

**Communication Jobs**      Communication Recurrent Messages

View All      Create Message   Open   Stop Job   Delete Job

Communication Jobs     

Alert	Job Status	Job Name	Start/ Scheduled Date	Population Name	Template Name	Channel	Organization
	Completed	USG-Demo_JobL	Mar 22, 2023 10:45:16 AM	USG_Demo_PopSQL	USG_Demo_Template_Letter	Letter	ITS_GeorgiaBEST_University
!	Completed	USG_Demo_JobE	Mar 22, 2023 10:42:51 AM	USG_Demo_PopSQL	USG_Demo_Template_Email	Email	ITS_GeorgiaBEST_University



## Interactions by Student

- Date, Channel, Type, Folder, etc.
- Interaction history/administrative view

[Communication Management](#) • [Interactions](#)

### Interactions

[Interactions](#)    Interaction Types

913255307 + Record Manual Interaction → Open

Lovejoy, Jackie

Interactions Show/Hide Column

Date	Channel	Type/ Template	Folder	Subject/ Description	Organization	Interactor
Mar 22, 2023 10:46:03 AM	Letter	USG_Demo_Template_Letter	CM_Student	USG_Demo_Template_Letter	ITS_GeorgiaBEST_University	JLOVEJOY
Mar 22, 2023 10:43:03 AM	Email	USG_Demo_Template_Email	CM_Student	USG_Demo_Template_Email	ITS_GeorgiaBEST_University	JLOVEJOY





## Interactions - Interaction Type

### - Add

[Communication Management](#) • [Interaction Types](#)

### Interaction Types

Interactions **Interaction Types**

 Add  Copy  Open  Delete

Interaction Types Show/Hide Column

Name	Description	Folder	Available For Use
Manual_Letter1	Manual_Letter1	CM_Student	Yes

# BCM Live Demo

## Logs – Error Log by Date and Student

[Communication Management](#) • [Logs - Communication Error Log](#)

### Error Log

**Error Log**    Communication Log

Search By Name or Banner ID    From: 03/21/2023    To: 03/23/2023    Go    Open

Error Log    Show/Hide Column    Search

Date	Banner ID	Name	Reason for Failure	Initiated By	Template Name	Type	Organization
Mar 22, 2023 10:43:03 AM	913214049	Lovejoy, Sherry	No recipient email address exists	JLOVEJOY	USG_Demo_Template_Email	Email	ITS_GeorgiaBEST_University
Mar 21, 2023 04:34:02 PM	913214049	Lovejoy, Sherry	No recipient email address exists	JLOVEJOY	Demo_Template_Email1	Email	ITS_GeorgiaBEST_University
Mar 21, 2023 08:46:02 AM	913214049	Lovejoy, Sherry	No recipient email address exists	JLOVEJOY	BCM_DemoEmail1	Email	ITS_GeorgiaBEST_University



## Logs – Communication Log by Student

[Communication Management](#) • [Logs - Communication Log](#)

### Communication Log

Error Log      **Communication Log**

913255307 - Apple, Ruby      From: 03/21/2023      To: 03/23/2023      Info

Communication Logs      Show/Hide Column      Search

Date	Banner ID	Name	Initiated By	Template Name	Type	Organization
Mar 22, 2023 10:46:03 AM	913255307	Lovejoy, Jackie	JLOVEJOY	USG_Demo_Template_Letter	Letter	ITS_GeorgiaBEST_University
Mar 22, 2023 10:43:03 AM	913255307	Lovejoy, Jackie	JLOVEJOY	USG_Demo_Template_Email	Email	ITS_GeorgiaBEST_University
Mar 22, 2023 10:34:33 AM	913255307	Lovejoy, Jackie	JLOVEJOY	USG_Demo_Template_Letter	Letter	ITS_GeorgiaBEST_University
Mar 22, 2023 10:31:06 AM	913255307	Lovejoy, Jackie	JLOVEJOY	USG_Demo_Template_Email	Email	ITS_GeorgiaBEST_University

# Ask your peers

- Ask your peers
  - Helpful hints
  - Lessons learned
- Self-reported implementation status
  - Banner 9 Implementation Grid

Banner 9 Implementation

The [Banner Releases Summaries](#) page specifies the most current release information.

Fall 2022 Survey Results	Student	Financial Aid	Accounts Receivable	General	Student Registration	Faculty
Abraham Baldwin Agricultural College	Prod 9.20.1.1	Prod 9.3.31	Prod 9.3.22	Prod 9.11	Prod 9.25	Prod 9.18
Albany State University *	Not Implemented	Not Implemented	Not Implemented	Not Implemented	Test 9.21	Not Implemented
Atlanta Metropolitan State College	Prod 9.20.1.1	Prod 9.3.32.0.4	Not Implemented	Prod 9.11 (01/01 /2021)	Prod 9.25.1 (04/01 /2021)	Prod 9.18.1

# 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

Topic	Date
Student Registration	Wednesday, January 25, 2023
Page Builder	Wednesday, February 8, 2023
Faculty Self-Service	Wednesday, February 22, 2023
Accounts Receivable	Wednesday, March 8, 2023
Communication Management	Wednesday, March 22, 2023
Proxy Management	Wednesday, April 5, 2023
Student Self-Service	Wednesday, April 19, 2023
Action Item Processing	Wednesday, May 3, 2023





# UNIVERSITY SYSTEM OF GEORGIA

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## Information Technology Services