

# Banner Communication Management

BCM

## How to send a message

Last updated: 4/27/2020

The use of Banner Communication Management (BCM) requires special permissions in Banner. If you feel that you need access to BCM to send messages to banner populations, please contact Bill Schuetz, CIO at [schuetzb@lanecc.edu](mailto:schuetzb@lanecc.edu).

Permission

## Quick Start : Send a Message to a Population

If you are familiar with BCM and all you need is a quick reminder of how to send a message, this page is for you!

If you are new to BCM, or need more detailed help, please skip ahead to the next slide.

### Sending a message to a new population

1. Go to **Queries** section.
2. Choose the query you want.
3. Hit "Generate Population" in the top bar.
4. Give the population a name and description - (The population will be saved in your Populations screen for later use).
5. Hit Refresh in the top bar to make sure the query finishes running.
6. Hit "Create Message" in the top bar.
7. Use "**LCC\_PREFERRED\_Email\_Address**" for the To: address.

### Sending a message to a prior population

1. Go to **Populations** section.
2. Choose the population you want and hit the "Open" button.
3. Hit "Regenerate Population" in the top bar.
4. Hit Refresh in the top bar to make sure the query finishes running.
5. Hit "Create Message" in the top bar.
6. Use "**LCC\_PREFERRED\_Email\_Address**" for the To: address.

Quick  
Start

## Ellucian's Description

BCM is an Ellucian application that enables tactical and transaction related communications associated with administrative functions in Banner

## A More Friendly Description

BCM lets you send messages via email, to anyone known to Banner.

- Students, vendors, employee groups... Anyone with a Banner ID.
- Messages can be one-off (send a specific message right now) or scheduled (registration reminders, employee benefits open enrollment reminder...)
- Messages can also be to large or small groups, or even to a single person based on a SQL query and sent based on a trigger (something happening in Banner, like an employee record is created for a new-hire)

**What is  
BCM?**

## Steps to a Message

There are 4 Steps to creating a message in BCM

1. Log in \* <https://siuslaw.lanecc.edu/CommunicationManagement>

\* Requires an account. Because of the nature of BCM and its ability to message large groups, special permission is required.

2. Choose or Create a Population

The population is the group you will send the message to.

3. Choose or Create a Template

This is where you write your message. BCM uses “templates” because it is possible to send messages on a schedule, over and over again. Even if you are sending a single message to a single person one time, you need to create a template for it.

4. Send it! \*\*

\*\* If you are sending a message to a large population it is best to schedule the message for later. More on this later.

## Step 1: Log In

BCM uses Lane's Central Authentication System (CAS)

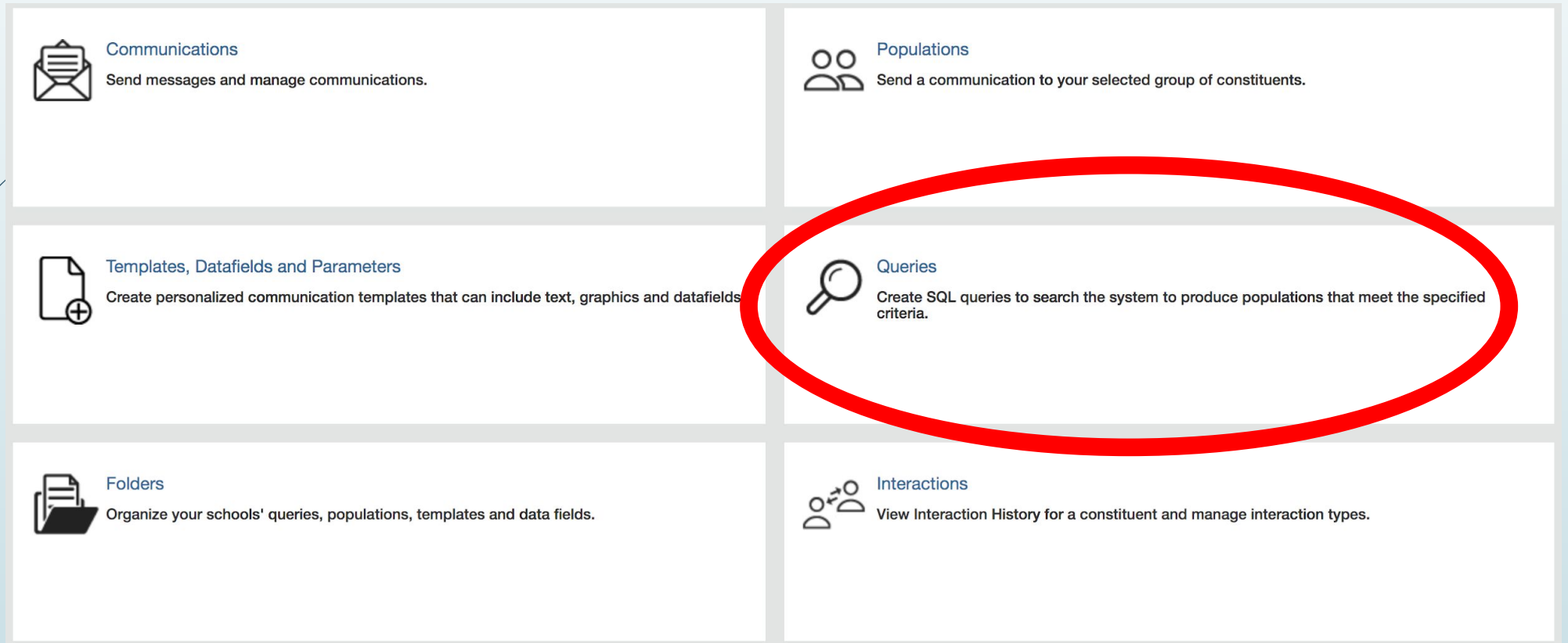
To log in, just visit:

<https://siuslaw.lanecc.edu/CommunicationManagement>

If you have not already logged into a system using CAS, you will see a familiar login screen. Just use your L#/Passphrase to log in and you will be redirected to the BCM Dashboard

Log In

## Step 2: Populations : Using a Query



Queries

## Step 2: Populations : Using a Query

BCM uses Populations to signify who a message is going to be sent to. Whether it's a population of 1 or 1,000,000, it's a population.

A query is a set of criteria that can be used to dynamically create populations from Banner. We have created a number of queries that can be found in the Queries section.

Queries are named so it should be fairly obvious what they are for. You can either scroll through the full list, or use the search field at the top of the list to find a query that will work for your message.

To use a query for a message, simply highlight the one you like and hit the "Generate Population" button.









This will place the population in your Populations section.

**Populations**






## Step 2: Populations

 <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>

Populations




## Step 2: Populations

 ellucian.






  Matthew R Danskine

Communication Management • Populations

### Populations

 Add  Open  Delete

Population Name	Folder Name	Status	Results	Created or Generated Date
Matt	Learning to use BCM	Available	1	Mar 30, 2020 03:47:51 PM

  1 of 1   Per Page 20 

Results 1

Populations

## Step 2: Populations : Manual Creation

On this page you can manually add or edit populations as well as edit populations you created from the Query screen.

- If you want to send a message to a population that you have already created, just skip ahead. You'll choose it in the "Send a Message" step.

To create a new population, just hit the "Add" button that looks like this.



If you would like to verify or edit a population you created previously, just use the "Open" button that looks like this.



## Step 2: Populations : Overview

When you open a population you will see an overview of that population with info like the name and description, what folder it is stored in, its status, who created it and how many are included in the population.

### ▼ Overview

**Population Name**

Matt

**Status**

Available

**Total Population Results**

1

**Population Description**

Just Matt - For Training

**Creator**

DANSKINEM

**Created Date**

Mar 30, 2020 03:47:51 PM

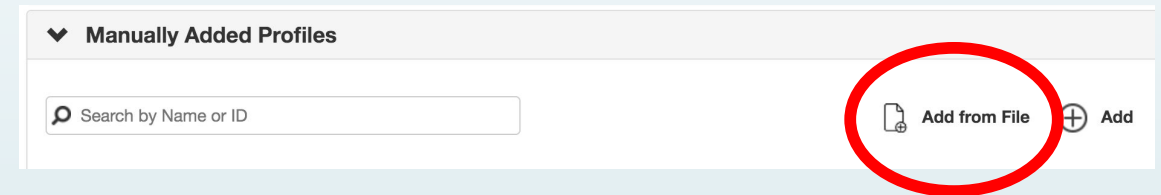
**Folder Name**

Learning to use BCM

## Step 2: Populations : Add from File

If you have additional profiles to add, it may be easiest to do so manually from a file.

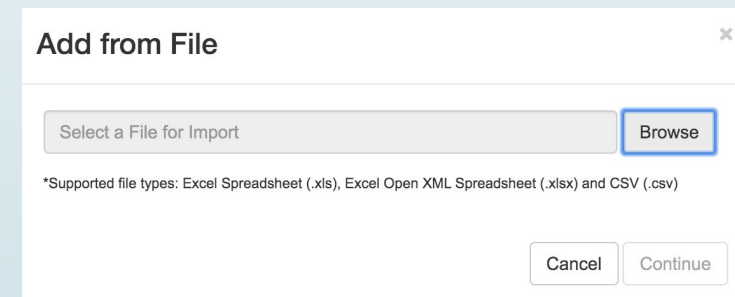
Just click on “Add from File”



When you do, you'll be presented with the following where you can choose the file from your computer.

Import files must be either XLS, XLSX or CSV.

The only data you need in the file is Banner ID (i.e. LNumber).



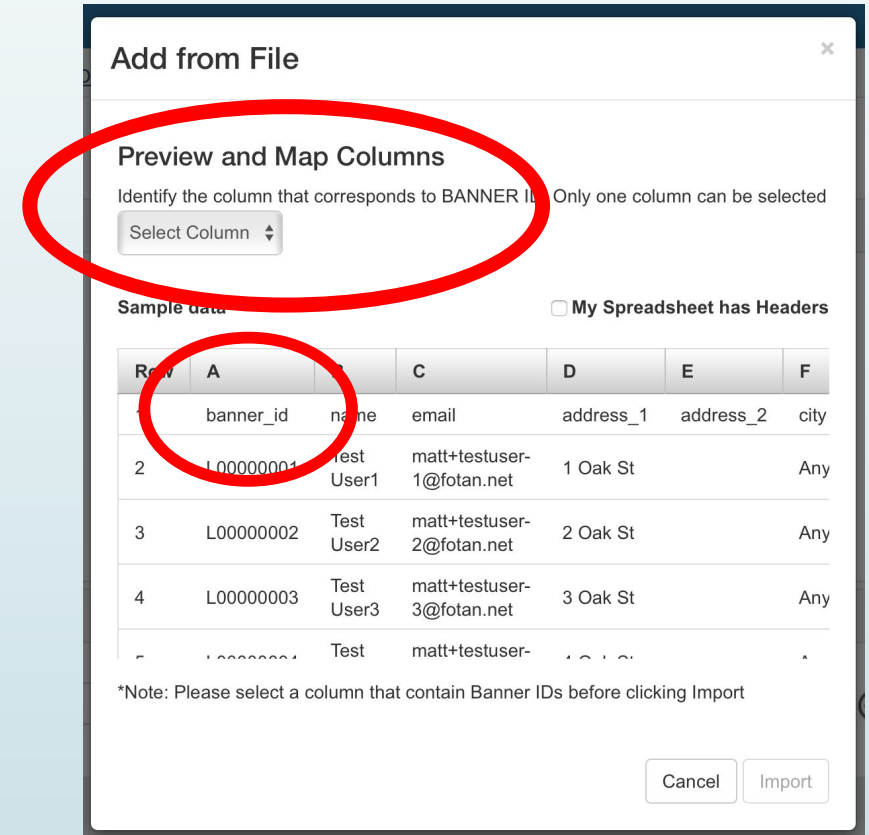
**\*\* Important Note:** Non-Banner contacts are not imported because BCM is meant to communicate within Banner. It is not meant to be a mass-mailer for individuals not in Banner.

## Step 2: Populations : Add from File

Once you choose the file you want to import, you are presented with a dialog box that shows you a sample of the file and asks which field holds the Banner ID.

- Lines that don't have Banner ID's that Banner recognizes are not imported. \*

If you have a CSV file with multiple columns of data you can just import the Banner ID's by entering the column number.



**Add from File**

**Preview and Map Columns**

Identify the column that corresponds to BANNER ID. Only one column can be selected

Select Column ▾

☐ My Spreadsheet has Headers

Row	A	B	C	D	E	F
	banner_id	name	email	address_1	address_2	city
2	L00000001	Test User1	matt+testuser-1@fotan.net	1 Oak St		Any
3	L00000002	Test User2	matt+testuser-2@fotan.net	2 Oak St		Any
4	L00000003	Test User3	matt+testuser-3@fotan.net	3 Oak St		Any

\*Note: Please select a column that contain Banner IDs before clicking Import

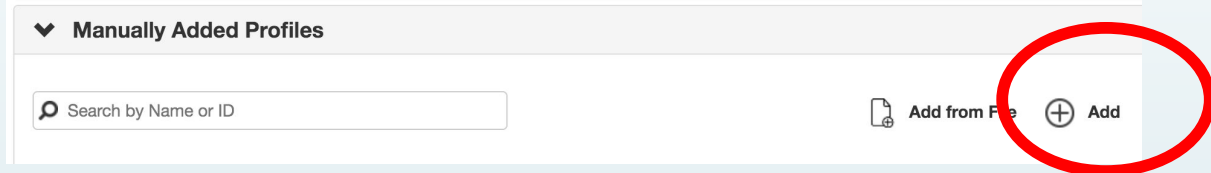
Cancel Import

**\*\* Important Note:** Non-Banner contacts are not imported because BCM is meant to communicate within Banner. It is not meant to be a mass-mailer for individuals not in Banner.

## Step 2: Populations : Manually Add & Delete Profiles

If you have a few profiles to add or remove it may be easiest to do so manually.

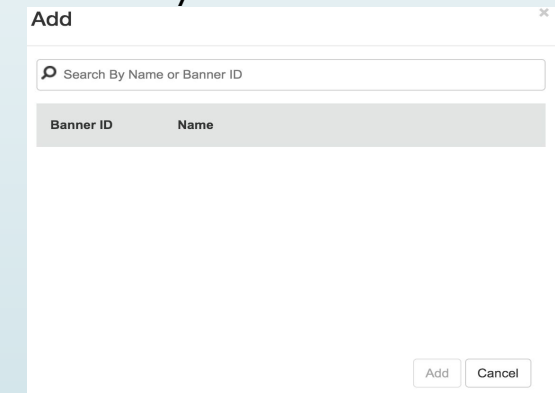
Just click on “Add”



When you do, you'll be presented with the following where you can search by name or L#.

Just start typing a name or L#, hit the return key and you will see a list of names to choose from.

If the one you want is in the list, highlight it and click “Add”.

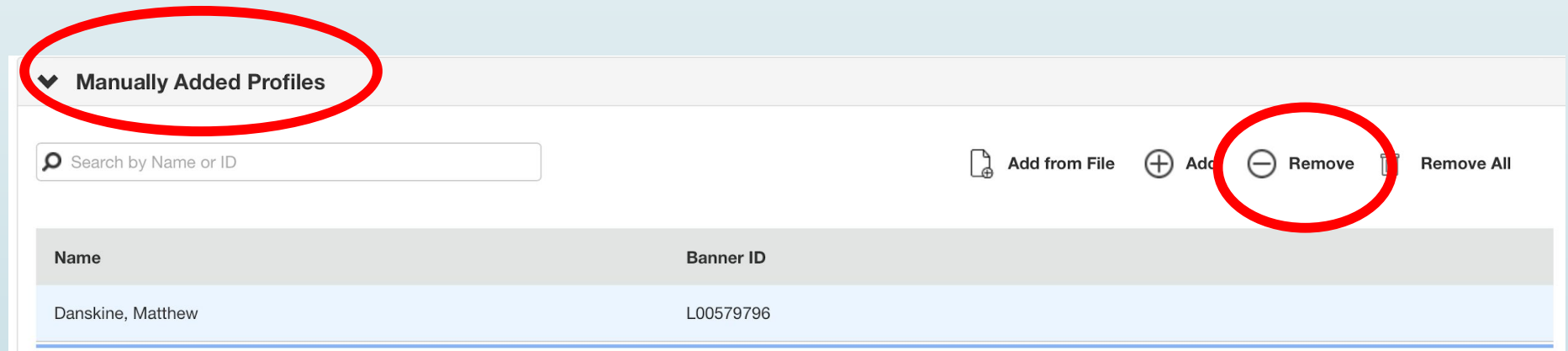


**\*\* Important Note** - If you search for a last name like “Smith” that will return a large number of results, it's possible BCM will not include the person you were looking for. It is most accurate to use L# when adding people to a population.

## Step 2: Populations : Manually Add & Delete Profiles

When you are through adding profiles to your population you may find that you want to remove some as well.

You can remove an individual manually by highlighting the name in the list and clicking on the remove button that highlights when you select a user.



Manually Added Profiles

Search by Name or ID

Add from File + Add - Remove Remove All

Name	Banner ID
Danskine, Matthew	L00579796



## Step 2: Populations : Reusing and Updating Dynamic Populations

Creating a population makes it available now and in the future. However, a population is like a snapshot in time. If your population uses any logic, like “Credit students taking MATH 98” (Dynamic populations like this require a programmer), the people that make up that population will change over time. To refresh the population so you can use it again, BCM includes a “Regenerate Population” button.

[Communication Management](#) • [Populations](#) • Open Population

BCM Team







 Create Message  Delete  Regenerate Population

Populations

**\*\* Important Note:** Manually created populations do not include a “Regenerate Population” button because there is no dynamic nature to their creation. Only populations that use POP-SELs or SQL will include a button to regenerate them.

**\*\* Important Note:** If you require a dynamically created population, and one does not already exist for your population, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can help you decide the best way to get the data field you need and, if necessary, assign a programmer to assist.

## Step 3: Templates

 <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 data fields.</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>

Templates

## Step 3: Templates

When you get to the Templates page you will see all the templates that have been created and that are available to you. If there are a large number, you may need to use the search field.

To view or edit a template, just click on it to highlight it and hit “Open”.

This is also the page where you can look at Data Fields and Parameters. More on that later.

### Templates

**Templates**

Search By Template Name

Open Copy Add Delete

Templates Data fields Parameters

Template Name	Folder	Description	Type	Status
20191122 Self Care Flyer	CM_Student		Email	Active
20200331 Create Stu Msg	CM_Student		Email	Active

## Step 3: Templates : Create a Template

**Add Template**

Template Name \*

Description

Folder \*

Communication Method  
☒ Email ☐ Mobile Notification ☐ Letter

Created By DANSKINEM

Valid From

Valid To

Would you like to share this template?  
☒ No ☐ Yes

A unique and descriptive name is required

Provide a detailed description on the template use cases this field can be quite large, over 500 characters is fine

Select the folder to save this template to

Select date range that the template is valid for use. For Example: the 1st two weeks of term

Chose if you want other user's to see or use this template

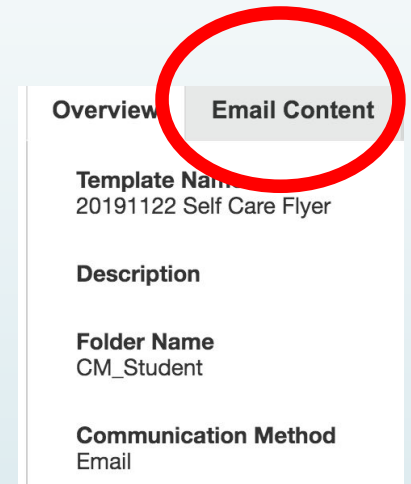
**Templates**

**Do not forget to hit the save button!**

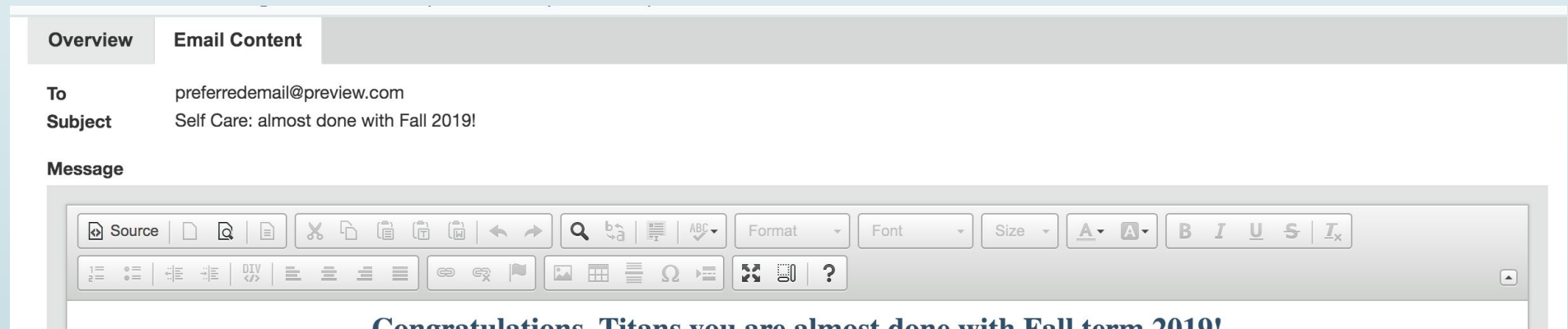
## Step 3: Templates : Edit / View a Template

This page should be fairly familiar as it's similar to the Population page. When you first open it you will see an Overview as well as a tab to view the content of the message.

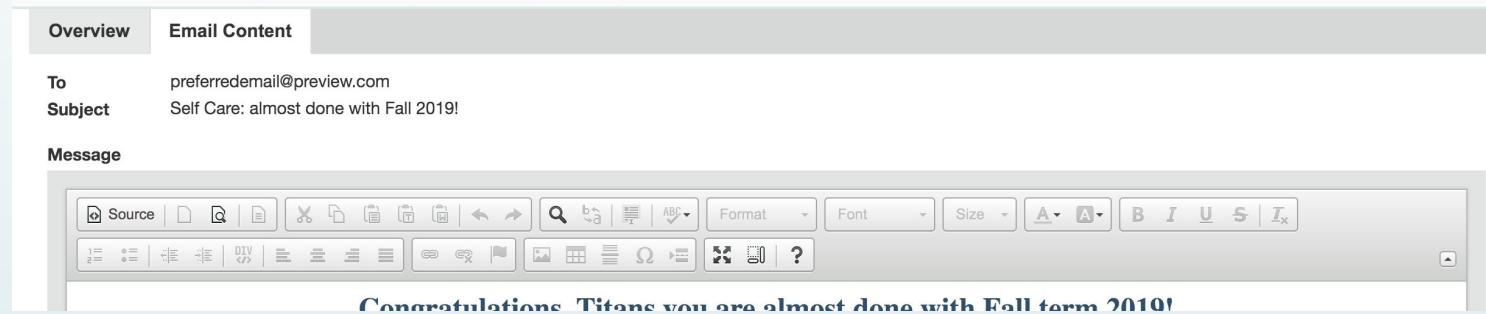
The "Content" tab will have a pretty standard editor much like web based email (gmail) or Facebook.



## Templates



## Step 3: Templates : Edit / View a Template



The editor has buttons for simple things like images, font, color, size, bold, italic, strikethrough, lists... It will even let you paste content from MS Word and clean it up getting all the “Word Stuff” out of it so it looks right to the person at the other end of the message.

**\*\* Special Note:** Attachments (such as PDFs, Word Docs, Spreadsheets...) are not possible at this time, but a work around is to place a file you want to send with the message in Google Drive, share it with “anyone with the link” and then add the link to the document to the message in BCM. Not optimal, but it works.

**When you are done editing you must save the message using the save button at the bottom of the page.**

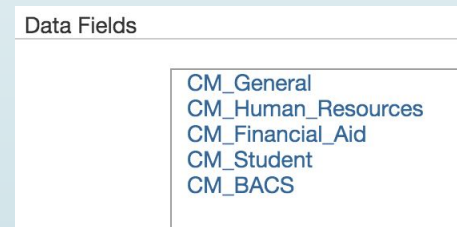
## Step 3: Templates : Data Fields

Data Fields in BCM are what allow you to customize messages to large groups. Adding personal information such as the receiver's name, amount awarded by financial aid, mailing address... Anything that is in Banner can likely be added to a message.

To use a data field, just put the cursor where you want it and click the button.



This will bring up a list of Banner areas where the data for the data fields will be pulled from. Just pick the appropriate area to see available data fields.



Once you find the one you want, just hit "Insert" and it will be placed in the space next to the cursor.



## Step 3: Templates : Data Fields

Data Fields are kind of odd looking things. You'll notice they are surrounded by \$ and look like this → \$CM\_Address\_City\_State\_Zip\$

Because \$'s are used as delimiters you have to treat a \$ you want to use in the content of the message in a special way. *(In theory this should only come up in messages that talk about money.)*

If you need to use a dollar sign, use the \ (backslash), known as an "Escape Character". An escape character tells BCM to ignore the next character letting you use special characters, like a dollar sign, without blowing up your message. *(At this time, the \$ is the only "special character" that we know of.)*

### Templates

#### **For Example:**

Your financial aid award of \\$1,000 will be credited on September 1.

*Notice how the dollar amount is written "\\$1,000". The "\" tells BCM to ignore the \$ so it doesn't throw an error thinking 1,000 is a data field.*



## Step 3: Templates : Data Fields

There are a large number of data fields available by default. However, if you need a data field that is not currently available to you, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can help you decide the best way to get the data field you need and, if necessary, assign a programmer to assist.

### **Add the email address using a Special Data Field:**

The “To” field must be filled in using a special data field that inserts each person’s preferred email address for the selected population. To do this you must place your cursor in the “To” field, click, and select Insert Data Fields. Now select the Data Field attribute “**LCC\_PREFERRED\_Email\_Address**” from the CM\_General folder.

When you review the message outside of edit mode it will read [preferredemail@preview.com](mailto:preferredemail@preview.com).

## Step 3: Templates : Data Fields

Certain data fields, such as anything that changes over time require parameters (next slide) so the system knows which moment in time it should pull the data from.

### **For Example:**

You want to send a message to all credit students about to graduate to remind them to apply for graduation. The system needs a few parameters so that it knows which students about to graduate it should send the message to.

### Templates

If you have these data fields included in your message template, you will be prompted to add the missing parameters before sending the message. If you aren't sure how to use these parameters, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can help you decide the best way to get the data field you need and, if necessary, assign a programmer to assist.

## Step 3: Templates : 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 get selected from the Banner database for a Banner ID when the data field is calculated.

### **For 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.

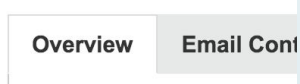

## Templates

**\*\* Important Note:** More will be written about this later. For now, if you need parameters, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can help you decide the best way to get the data field you need and, if necessary, assign a programmer to assist.

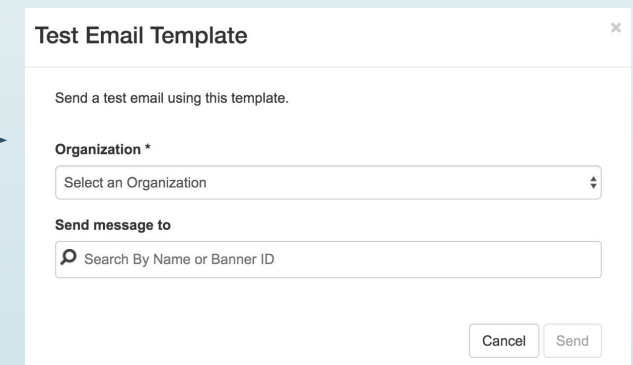
## Step 3: Templates : Sending a Test

Once you have your template created and your data fields in place, it's always a good idea to see what the message is going to look like on the other end. To do this, you'll want to send a test.

### To send a test:

1. Return to the Overview tab 
2. Click on the 3 vertical dots 
3. Click on "Test Email" and you'll see this →

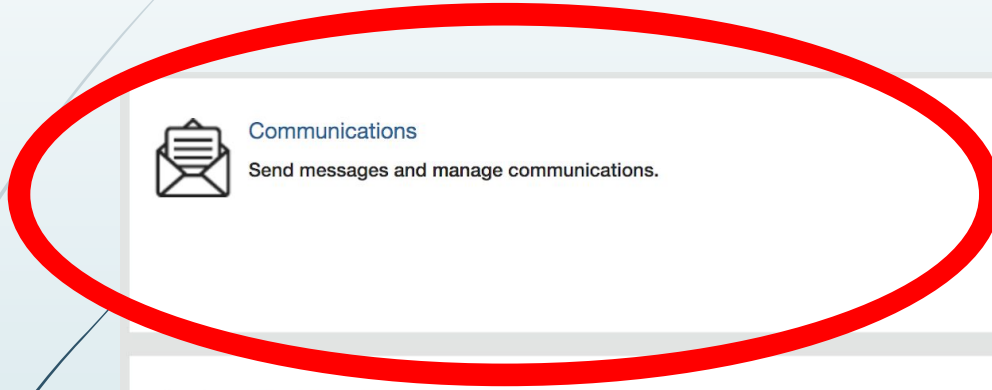
Choose the organization you are sending from, put your L# in the "Send message to" field and select your name when it appears in the list below, then click send.



The screenshot shows a dialog box titled "Test Email Template" with a close button (X) in the top right corner. Inside the dialog, there is a heading "Send a test email using this template." followed by two main sections. The first section is labeled "Organization \*" and contains a dropdown menu with the text "Select an Organization" and a small upward/downward arrow icon. The second section is labeled "Send message to" and contains a search input field with a magnifying glass icon and the placeholder text "Search By Name or Banner ID". At the bottom right of the dialog, there are two buttons: "Cancel" and "Send".

Once you receive the message, make changes as you see fit, or continue to schedule the message.

## Step 4: Send It!



### Populations

Send a communication to your selected group of constituents.



### Templates, Datafields and Parameters

Create personalized communication templates that can include text, graphics and datafields.



### 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.



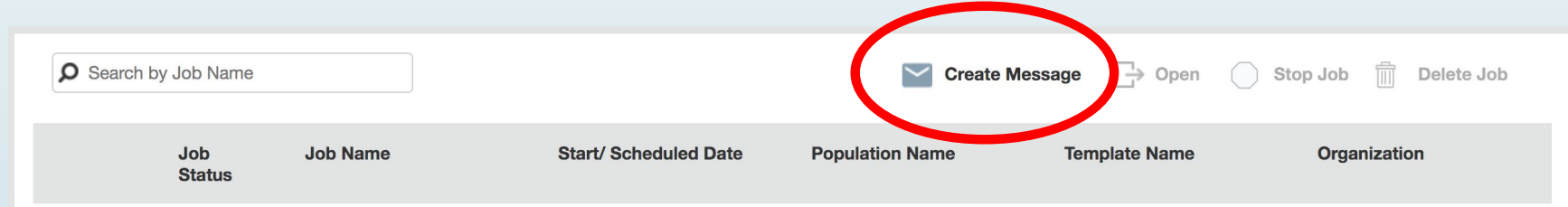
### Interactions

View Interaction History for a constituent and manage interaction types.

Send

## Step 4: Send It!

Click on the Communications group to be taken to the page where the magic happens. Here you will see a list of communications you have sent along with some basic information about them such as date, org, population and template names...



Job Status	Job Name	Start/ Scheduled Date	Population Name	Template Name	Organization
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Send

To start a new message, just click on “Create Message”

## Step 4: Send It! : Create a Message

This is the quick and easy part. Once you click on “Create Message” you’ll see a page with a simple form.

Give the communication a name

Select the Org you want the message to come from

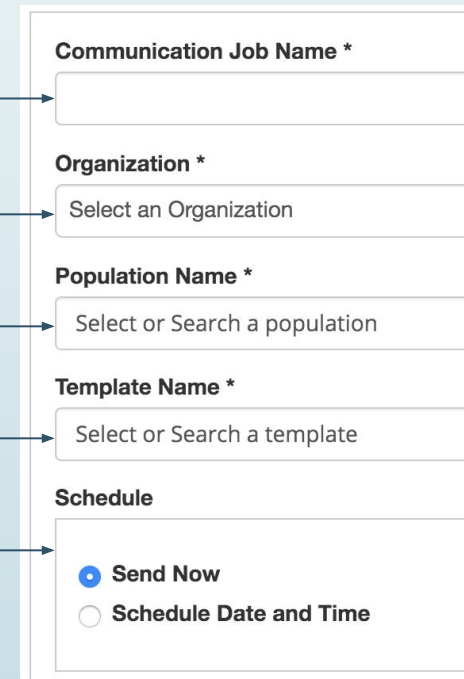
Select the Population you want to use for this message

Select the Template you want to use for this message

Send it now, or later?

Read on for important notes about some of these...

Send



Communication Job Name *	<input type="text"/>
Organization *	Select an Organization
Population Name *	Select or Search a population
Template Name *	Select or Search a template
Schedule	<input checked="" type="radio"/> Send Now <input type="radio"/> Schedule Date and Time

## Step 4: Send It! : Job Name

What you call a job doesn't really matter, but you should include information about the job so that it's easier to find later.

### Examples of GOOD Job Names

- Graduation Application Reminder
- All Employee COVID-19 Planning
- CM\_HR Time Entry submit timesheet reminder

### Examples of BAD Job Names

- App Reminder -- *(What app?)*
- Emergency Planning -- *(What group? What emergency?)*
- Time Entry -- *(What time? Who? For what?)*

**\*\* TIP:** If you plan to re-use a job over and over, it's best to not use things like dates in the name of the job. In other words, if you name a job "2020 Graduation App Reminder", it won't be obvious that you can just update the population and hit send in 2021 because of the specific year listed in the name.

Send



## Step 4: Send It! : Organization

The organization describes the sender of the communication. It may also specify a configuration for sending the message over a specific communication channel (For example, an email sender account and email server).

For example, an Organization will fill in things like:

- The email address a message is coming from
- The name listed for the email address
- The reply-to address if you want people to be able to reply

A dark grey arrow-shaped button pointing to the right with the word "Send" in white text.

Send

If you need to send a message and there is not an appropriate org set up, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can help you decide the best way to create the organization you need and, if necessary, assign a programmer to assist.

## Step 4: Send It! : Population & Template

### Population

This is the population you created, or want to use, for this message. Just use the pull-down to see all the populations available to your user account and pick the one you want to use.

### Template

This is the template you created, or want to use, for this message. Just use the pull-down to see all the templates available to your user account and pick the one you want to use.

Easy peasy!

**\*\* Tip:** If you don't see a Template you have created, go back to the Template section and make sure you published it.

Send

## Step 4: Send It! : Send or Schedule?

This is an important question. Here are some things you need to know.

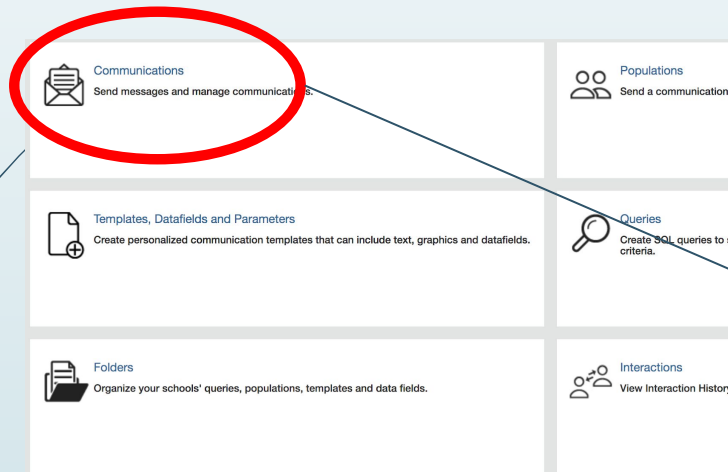
1. Communications are queued FIFO. That's fancy programmer talk for "First In First Out". Basically, you submit a job, it gets in line, the system takes the first job in line, processes it, then moves on to the next job in order.
2. Some communications, depending on the size of the population, can take some time to send.
3. Therefore, **if you have several messages to send, and one is time sensitive, do that one first!**
4. If your message isn't time sensitive, schedule it to start at 10pm, or next Monday, or whenever makes sense. Not every message needs to go out immediately.

A dark grey arrow-shaped button pointing to the right, with the word "Send" in white text.

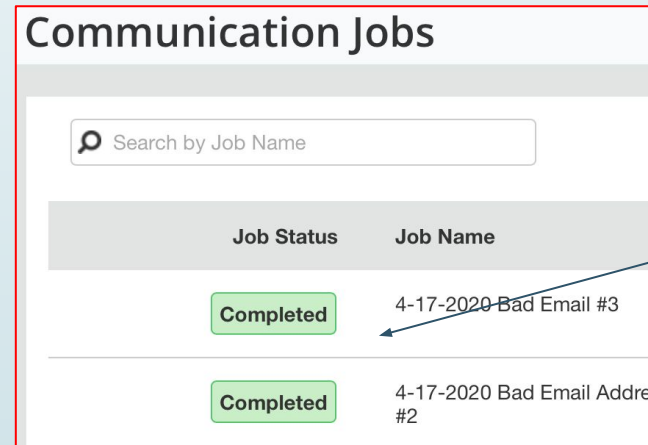
Send

## Step 4: Send It! : Status of a Job

Once you have hit send, you can check the status of the communication from the Communications page.



Send



Click on the job you would like to know the status of and hit the "Open" link.



## Step 4: Send It! : Status of a Job

On this page you will see a lot of information about your communication

Send

A summary of the job

A summary of how many were completed, how many errors...

A searchable list of the population the message was sent to along with their particular status

**Communication Job Summary** Completed

**Start/ Scheduled Date** Apr 17, 2020 12:08:44 PM

**Job Started On** Apr 17, 2020 12:08:44 PM

**Job Ended On** Apr 17, 2020 12:08:46 PM

**Population Name** [Matt](#)

**Population Size** 5

**Template Name** Matt's Training Template

**Type:** Email

**Organization** Information Technology

**Creator** DANSKINEM

**Group Send Summary**

Completed Items 5

Processing Items 0

Error Items 0

Stopped Items 0

**Total Items** 5

Name	Banner ID	Status	Start Date	End Date
Ascheri, Kenneth	L00632214	Completed	Apr 17, 2020 12:08:44 PM	Apr 17, 2020 12:08:46 PM
Barlow Powers, Barbara	L00000723	Completed	Apr 17, 2020 12:08:44 PM	Apr 17, 2020 12:08:46 PM
Barlow Powers, Philin	L00001189	Completed	Apr 17, 2020 12:08:44 PM	Apr 17, 2020 12:08:46 PM

## Step 4: Send It! : What do I do about errors?

Administrative users can view a list of errors that occurred in processing communications.

A certain number of errors are to be expected with large populations. If you have a message with a large number of errors when sending, please contact Pat Griffin, Software Services Manager, IT at [griffinp@lanecc.edu](mailto:griffinp@lanecc.edu). He can assign a BCM administrator to help you figure out what happened and the best way to fix it.

A dark grey arrow-shaped button pointing to the right, with the word "Send" in white text.

Send

## Further Reading

If you prefer a more detailed and technical overview of BCM, there is a copy of the BCM User Guide in the IT Blog.

[BCM User Guide v9.4 - July-2018.pdf](#)

The User Guide includes step-by-step processes for all aspects of BCM, but lacks the more easy to follow end-user centric way this manual was written.

Further