Communication Management Implementation

Texas A&M University
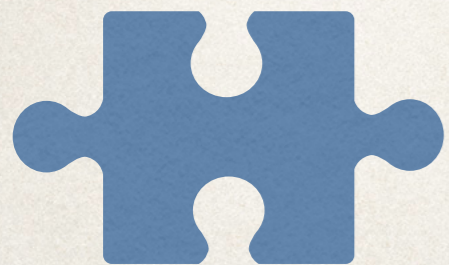
May 26th 2022

Agenda

What CM Is and Isn't

Implementation Questions

What's New & TAMU Customizations

Configuration & Performance

Questions / Open Discussion

What BCM Is and Isn't
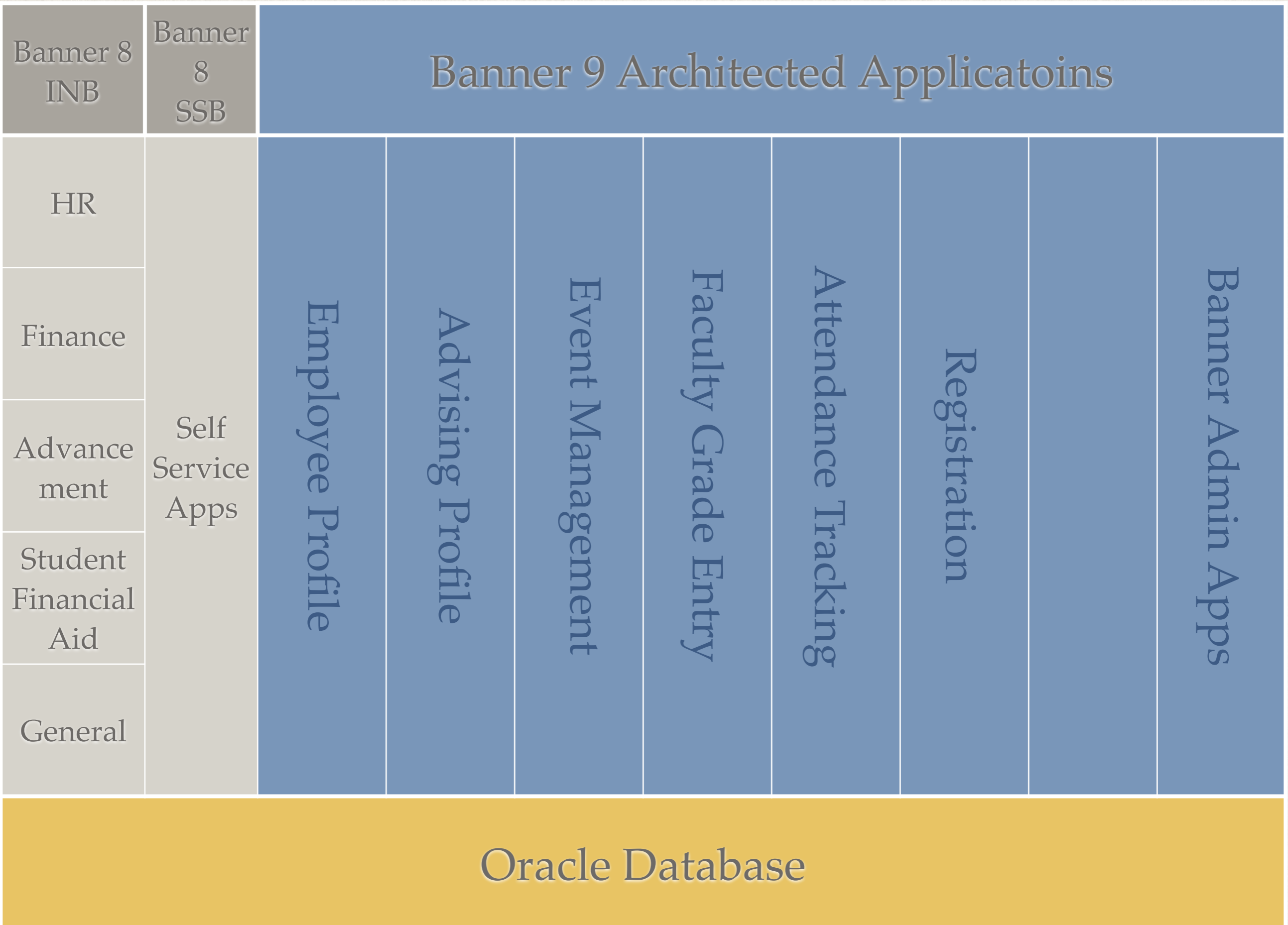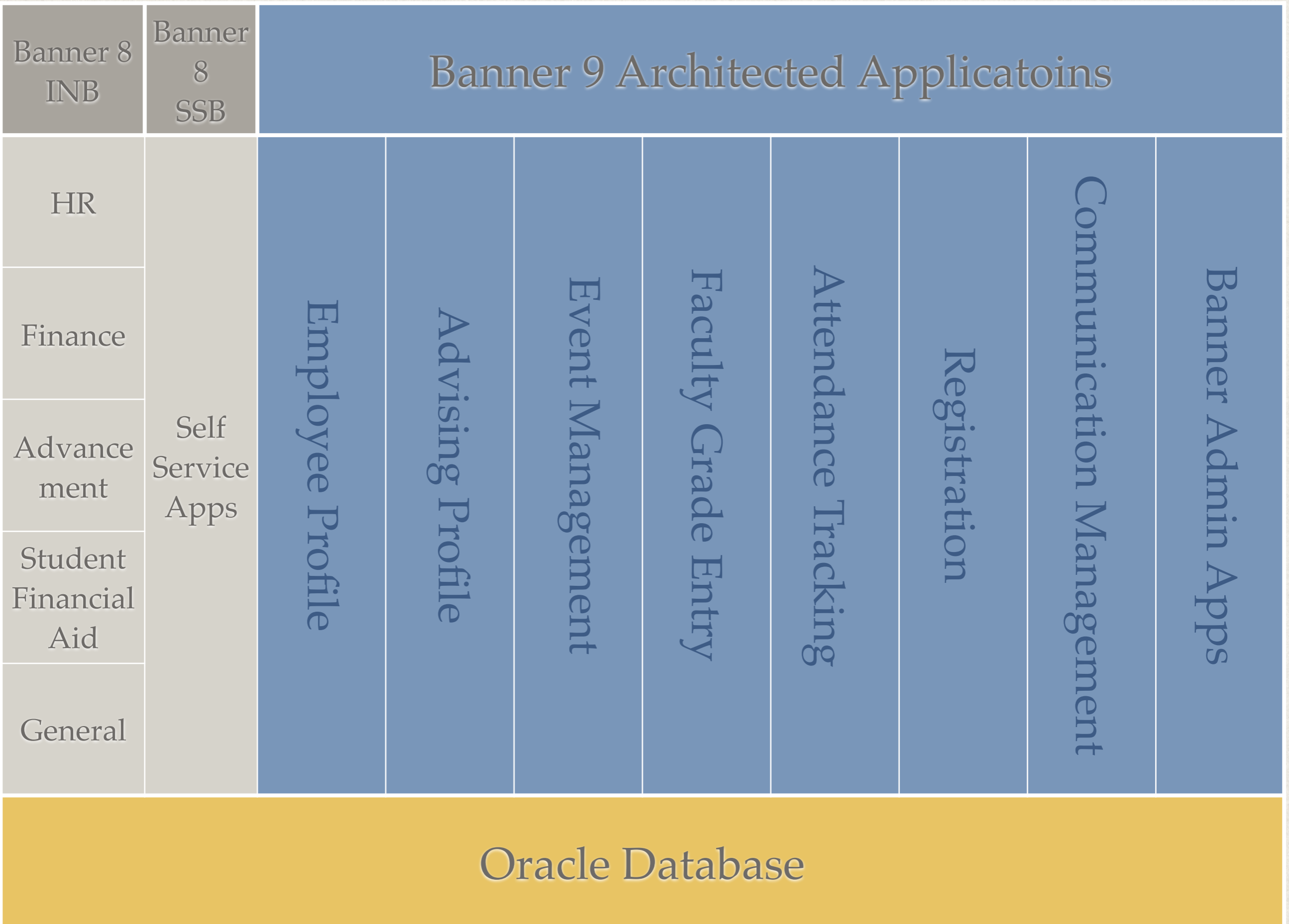
Communication Tool

Communication Tool

Email
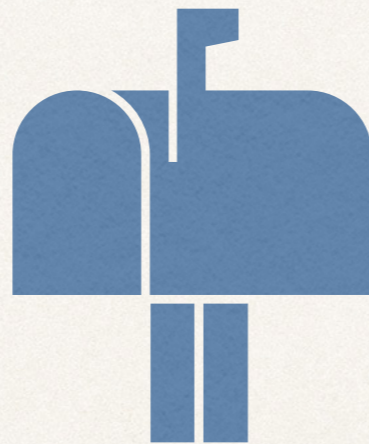
PDF Letter
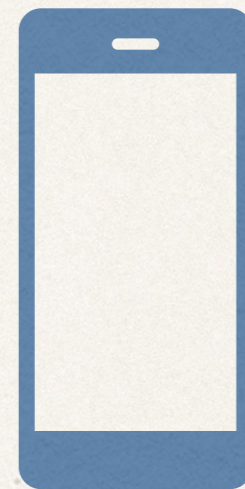
Mobile Notification

Template Creator

Template Creator

Embedded Open Source Content Editor - CKEditor
- https://ckeditor.com/

Features:

HTML Source Mode	Images	Fonts	Paste From Word
Full Screen Mode	Templates	Formatting Tools	Data Fields

Population Creation

Population Creation

SQL Query

Banner Popsel

File Based

Point in Time vs. Refreshed

.xls
.xlsx
.csv

Communication Tracking

Communication Summary

Communication Job Summary Completed

Start/ Scheduled Date   May 18, 2022 04:58:30 PM

Job Started On   May 18, 2022 04:59:00 PM

Job Ended On   May 18, 2022 04:59:08 PM

Population Name   FAID_SUM22_CPOS_UG_MAY18

Population Size   396

Template Name   FAID_SUM22_CPOS_UG

Type   Email

Data Field Parameters
  Template Being Used FAID_SUM22_CPOS_UG

Organization   FAID Scholarships and Financial Aid Main

Creator   RFISHKIND

Group Send Summary

Group Send Summary

Completed Items	396
Processing Items	0
Error Items	0
Stopped Items	0

Total Items 396

Interactions

✤ Manual Interaction Tracking e.g. student call to the admissions office

✤ Interaction History - admin view of all BCM communications for a specific student, including rendering of the actual communication

Interactions

* Manual Interaction Tracking e.g. student call to the admissions office

* Interaction History - admin view of all BCM communications for a specific student, including rendering of the actual communication

Interaction Detail

TO[ ] Phillips, Jay

Date	Feb 15, 2018 01:38:14 PM
Channel	Email
Template	AD_EIS_TEST_EMAIL
Folder	AD_EIS_TEST
Organization	TAMU Root Organization
Created By	JAYPHILLIPS
To	jayphillips@tamu.edu
Subject	CCM Testing

ĀTM | TEXAS A&M UNIVERSITY

February 15, 2018

Dear Jay:

This is a test of CCM.

Banner ID: T0[ ]

Sincerely,

Texas A&M University
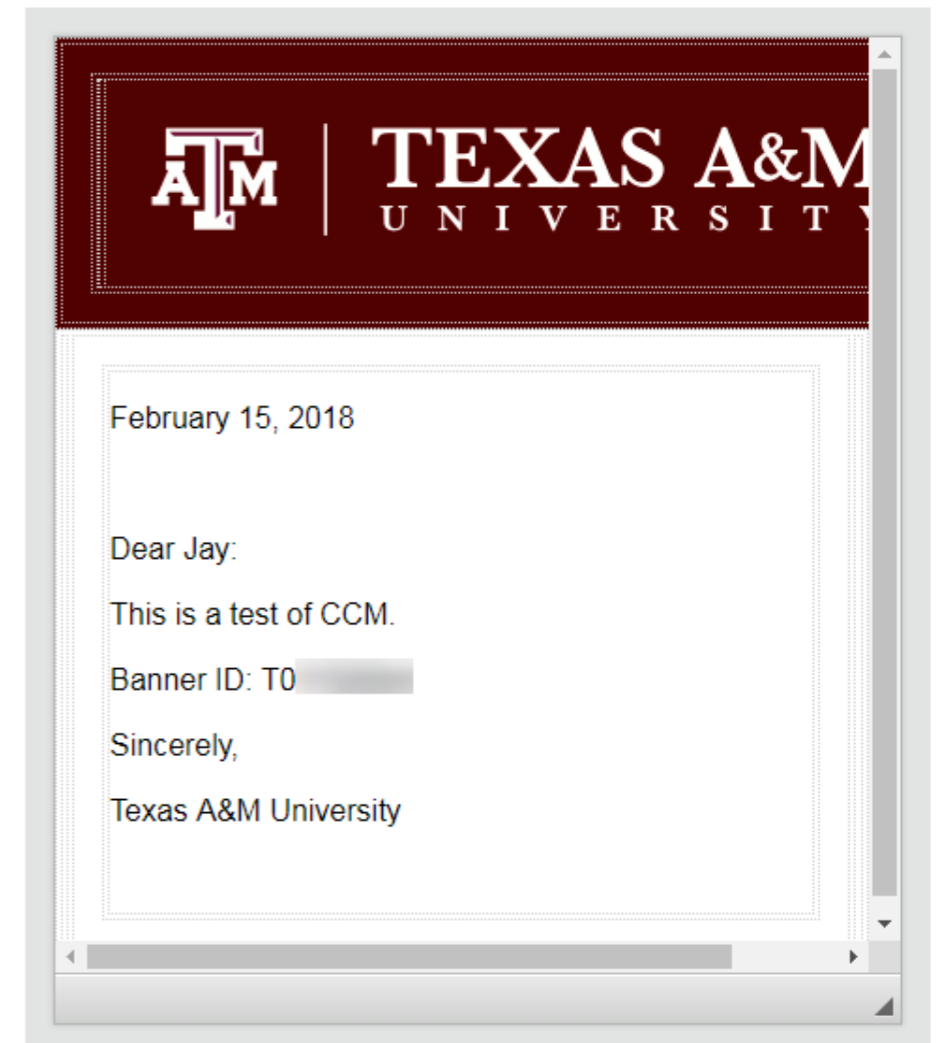
Security

Security

Web Tailor (SSB) Role-Based Security

✤ SSB Roles Control User Access
  ✤ COMMUNICATIONADMIN
  ✤ COMMUNICATIONCONTENTADMIN
  ✤ COMMUNICATIONUSER

Task	Admin	Content Admin	User
Folders	M	Q*, Insert	Q*
Queries	M	M*	Q and Run*
Populations	Q, Delete	Q*, Delete Own	Q*
Templates	M	Q*, Copy*, M Own	Q*
Datafields	M	Q*, Insert*, M Own	Q and Test*
Communications	M	Send*, M Own	Send*, M Own
Interactions	Q, Manually Entry	Q, Manual Entry	Q, Manual Entry
Interaction Type	M		
Organizations	M		
Error Log	Q		
Comm Log	Q		

Implementation Questions

Implementation Questions

- Who Needs Access?

- What level of access is appropriate?

- Do you need more than one organization?

- Naming conventions for folders, templates, datafields etc.

What BCM Is NOT

What BCM Is NOT

- Customer Relationship Management (CRM) Application

  - Does not provide a holistic view of the students record

  - Unable to schedule recurring communications

What BCM Is NOT

- Customer Relationship Management (CRM) Application

  - Does not provide a holistic view of the students record

What's New

What's New

- 9.7 Release June 2020
  - Share Populations
  - SMS Templates

- 9.7.1 Release August 2020
  - Application Health Check

- 9.7.2 Release March 2021

- 9.7.3 Release August 2021

- 9.7.4 Release March 2022

Texas A&M Customizations

Templates For Templates

Themed

Brand Guide Colors

Brand Guide Fonts

Fonts and Colors

```
1  /**
2   * @license Copyright (c) 2003-2013, CKSource - Frederico Knabben. All rights reserved.
3   * For licensing, see LICENSE.html or http://ckeditor.com/license
4   */
5
6  CKEDITOR.editorConfig = function( config ) {
7          // Define changes to default configuration here. For example:
8          // config.language = 'fr';
9          // config.uiColor = '#AADC6E';
10
11 config.contentsCss = '/css/tamu.css';
12 //config.contentsCss = 'https://compassxe-rsb-tst2.eis.tamu.edu/css/tamu.css';
13
14
15 config.font_names = 'Oswald/Oswald, sans-serif;' +
16                     'Crimson Text/Crimson Text, Georgia, serif;' +
17                     'Open Sans/Open Sans, Helvetica Neue, Helvetica, Arial, sans-serif' +
18                     'Arial/Arial, sans-serif;' +
19                     config.font_names;
20
21 config.colorButton_colors =
22     '500000,FFFFFF,332C2C,707373,D6D3C4,998542,744F28,5B6236,003C71,FCE300,E4002B';
23
24 config.format_tags = 'p;h1;h2;h3;pre;address;div';
25
26 config.format_h1 = {element: 'h1', attributes: {'class': 'tamu_h1'}};
27 config.format_h2 = {element: 'h2', attributes: {'class': 'tamu_h2'}};
28 config.format_h3 = {element: 'h3', attributes: {'class': 'tamu_h3'}};
29 config.format_p  = {element:  'p', attributes: {'class':  'tamu_p'}};
30 };
```

Fonts and Colors

CKEDITOR.editorConfig

```
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12 //config.contentsCss = 'https://compassxe-rsb-tst2.eis.tamu.edu/css/tamu.css';
13
14
15 config.font_names = 'Oswald/Oswald, sans-serif;' +
16                     'Crimson Text/Crimson Text, Georgia, serif;' +
17                     'Open Sans/Open Sans, Helvetica Neue, Helvetica, Arial, sans-serif' +
18                     'Arial/Arial, sans-serif;' +
19                     config.font_names;
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23
24 config.format_tags = 'p;h1;h2;h3;pre;address;div';
25
26 config.format_h1 = {element: 'h1', attributes: {'class': 'tamu_h1'}};
27 config.format_h2 = {element: 'h2', attributes: {'class': 'tamu_h2'}};
28 config.format_h3 = {element: 'h3', attributes: {'class': 'tamu_h3'}};
29 config.format_p  = {element:  'p', attributes: {'class':  'tamu_p'}};
30 };
```

Fonts

Colors

Style Tags

Templates

```
1  /*
2   Copyright (c) 2003-2014, CKSource - Frederico Knabben. All rights reserved.
3   For licensing, see LICENSE.md or http://ckeditor.com/license
4  */
5  CKEDITOR.addTemplates("default",{imagesPath:CKEDITOR.getUrl(CKEDITOR.plugins.getPath("templates")+"templates/images/"),
```

```
45          {title:"TAMU Email",
46           image:"lsl_h100.png",
47   description:"TAMU Email Template with Maroon Header",
48          html:'<head>' +
49                '<title></title>' +
50                '<link href="https://fonts.googleapis.com/css?family=Oswald|Crimson+Text|Open+Sans" rel="stylesheet" />' +
51                '<style type="text/css">.tamu_h1 {font-family: "oswald",sans-serif;}' +
52                '.tamu_h2 {font-family: "crimson text","georgia",serif;}' +
53                '.tamu_h3 {font-family: "crimson text","georgia",serif;}' +
54                '.tamu_p  {font-family: "open sans","helvetica neue","helvetica","arial",sans-serif;}' +
55                '</style>' +
56                '<!--[if mso]>' +
57                '<style type="text/css">span {font-family: "arial",sans-serif !important;}' +
58                '.tamu_h1 {font-family: "arial",sans-serif !important;}' +
59                '.tamu_h2 {font-family: "georgia",serif !important;}' +
60                '.tamu_h3 {font-family: "georgia",serif !important;}' +
61                '.tamu_p  {font-family: "arial",sans-serif !important;}' +
62                '</style>' +
63                '<![endif]-->' +
64                '</head>' +
65                '<body bgcolor="#FFFFFF" style="font-family: Arial, sans-serif; -webkit-font-smoothing: antialiased; -webkit-text-size-adjust: none; width: 100% !important; height: 100%; margin: 0; padding: 0;">' +
66                '<p style="display: none; visibility: hidden; mso-hide:all; color:#ffffff; max-height: 0px; overflow: hidden;">Enter Preview Text</p>' +
67                '<p style="display: none; visibility: hidden; mso-hide:all; color:#ffffff; max-height: 0px; overflow: hidden;">' +
68                ' &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; ' +
69                '&zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj;' +
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86                ' &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; ' +
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55               '</style>' +
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58               '.tamu_h1 {font-family: "arial",sans-serif !important;}' +
59               '.tamu_h2 {font-family: "georgia",serif !important;}' +
60               '.tamu_h3 {font-family: "georgia",serif !important;}' +
61               '.tamu_p  {font-family: "arial",sans-serif !important;}' +
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79               ' &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; ' +
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84               '&zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj;</p>' +
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86               ' &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; &zwnj; ' +
```

Configuration
&
Performance

Configuration

- 6 RSB Servers running the UI for Communication Management
  - Email engine is turned OFF by changing the placeholder to false.
- 2 Bulk Mail Servers which run the email engine
  - Email engine is turned ON by changing the placeholder to true.

Performance

- 60,000+ Email Campaigns

- Runtimes were between 55 minutes and 115 minutes

- 934 emails sent per minute on average

Questions
&
Discussion

Jay Phillips

Jay@tamu.edu