RADIUS CRM TRAINING MANUAL

FOR

UNDERGRADUATE

AND

GRADUATE

ADMISSIONS TEAMS

Last Updated: 20 November 2015

TABLE OF CONTENTS

KEY TERMS WITHIN RADIUS

- **Application**: A form that is used for collecting student information requesting admittance to an institution. This form may be electronic or paper.
- **Assignment Rules**: Also known as Territory Assignments or Territory Management. When a record is created or updated through either automated or manual processes a record is assigned to specific team members. There are two types of Assignment Rules, random or criteria built.
    - **Random Assignment**: No clearly defined rules or criteria. Randomly assigns new contact records to users.
    - **Criteria Assignment**: A clearly defined set of rules or criteria which are used to determine the order and conditions for assigning records to individual team members. These rules can be based on one or a combination of such things as program, state, zip code, or student type, to name just a few.
- **Campaign**: A one-time mass email to an identified target list. Campaigns are used to promote a single message.
- **Cases**: Designed to keep a record of any/all interactions that a contact has with the institution (outside of applications and event registrations). A Case is automatically created when someone fills out an inquiry form over the web or when an inbound email is received. The user can also manually create a Case for a contact.
    - **Case Owner**: Creator of the case.
    - **Case Subject**: The subject or issue that is to be tracked. This field is activated only after a Contact Record has been selected. A naming convention or established list is recommended.
    - **Primary Contact**: The Contact Record the case is associated with and attached to.
    - **Case Source**: This is the origin of the case. Example: Web, Phone, Email, etc.
    - **Case Status**: A Case can be Open or Closed.
- **Case Messages**: A tool used to manage Cases as well as to provide additional details Case Messages can be internal, outgoing or incoming messages.
    - **Case Message Subject**: This subject should relate to the Case subject but be specific to the message. A naming convention or established list is recommended.
    - **Message Type**: Identifies if the message is Incoming, Outgoing, or Internal.
    - **Case Message Owner**: Defaults to the created of the message. This can be changed to another user.
- **Communication Plan**: A series of emails sent to a target list that have defined entry and exit points which are sent over a period of time at pre-defined intervals.
- **Contact Owner**: The owner of an individual Contact Record. This can be assigned by using Assignment Rules or can be hand selected from a drop down list of all users.
- **Contact Record**: Record containing all basic data to be collected on an individual. This fields on the contact module can be overwritten.
    - **Creating a contact record**: New contact records can be created from electronic forms, importing, or individually by hand.
- **Dashboards**: A pictorial representation of real-time data. Dashboards can be created in Cases, Campaigns, Contacts, or Lifecycles.

- **Duplicate Check Settings**: These are settings used to reduce the creation of duplicate records from based on predefined criteria. A combination of Absolute and Threshold Matching Criteria is used to compare inbound contact information with existing records. The modules with this option are:
    - **Contact Module**: Absolute Matching Criteria (TESC uses Student ID) and Threshold Matching Criteria (Weight is given to: Email, Last Name, Date of Birth, First Name)
    - **Organization Module**: CEEB code matching is used by TESC.
- **Educations Module**: Module used to list the schools or institutions a contact has attended.
- **Event Communications Module**: Module that provides a single location to access active, scheduled, and archived event communication.
- **Event Forms**: Form created to register attendees to an event. These forms are customizable and can be posted on the institution website.
- **Events Module**: Module used to create new, or manage existing, events or gatherings the user would like constituents to attend. Constituents may be prospective students, applicants, current student, or alumni. The user can manage the registration process, attendees, and location of the event or gathering.
    - **Events**: Any meeting or gathering with attendees that are managed through the Events Module.
    - **Attendees**: Individuals who register for an event who may or may not attend the event.
    - **Target:** Lists of contacts the user has identified to communicate an invitation to an event.
    - **Locations**: Where an event is being held. All events must be assigned a location. Locations can be customizable.
- **Experiences Module**: A module used to track contact data such as employer, title, start and end dates, and type of experience. This is directly attached to an Organization. A contact record must exist prior to adding experience data.
- **Fields**: The location where data is stored within each module. Fields can be system fields or custom fields.
    - **System Fields**: These are fields which are pre-created in the CRM and may or may not be editable.
    - **Custom Fields**: Fields created by the administrator to collect data. The field format, or type, depends on the type of data to be collected.
    - **Field Types**: The field format for system or custom fields. These include: test, integer, percent, currency, date, email, phone, pick list, URL, text area, checkbox, multi-select, date/time, month/year, number, auto-number, grouped multi-select, and postal code.
    - **Field Mapping**: Matching of column headers with existing fields within a given module, especially when importing.
    - **Field Dependency**: Creation of a "parent-child" relationship between two picklist fields. This can be used when the values of one field are dependent on the values of another. (Example: Intended Start Term = parent field and Majors = child field)
- **Inquiry Forms**: A form used to collect data from new constituent who are interested in learning more about your institution or program.
- **Inquiries**: Non-applicant contacts who are interested in learning more about your institution or program.
- **Inquiries Module**: Collects contact inquires, convert them to applicants, and students. Inquiry Forms are created in this module. This module is similar to the Case Module and will appear in Cases the list view.

- **Importing**: This is the process of adding multiple records to Radius. This may be to one or more modules through either an automated process (integration) or the import tool. The data must be in either a csv or xls format. Each module has specific field requirements for importing.
    - Assignment Rules: Set of rules that are used to determine record ownership.
    - Duplicate Settings: Option to update existing records and/or create new records when a duplicate is not found.
- **Iteration**: The unique time periods in which a program occurs. Iterations include Fall, Spring, Winter, and Summer combined with the year and the specific cohort (Example: Freshman, Transfer, Graduate).
- **Lifecycles**: Assists in the tracking of contacts as they move through the admissions process. A lifecycle demonstrates exactly where a contact record falls within the admissions process at any given point in time. Is the contact a lead, a prospect, or an applicant? These are all examples of lifecycles. Users have the option of assigning contacts both a lifecycle role and stage.
    - **Roles**: a system of categorizing a contact's progress, status or type within a module. Examples are: lead, inquiry, applicant
    - **Stages**: A subcategory of a role and is dependent upon a specific lifecycle role. This is a dynamic relationship. Examples: Applicant (role) and Accepted (stage), or, Inquiry (role) and Inactive (stage).
- **List Views**: The tool within Radius that allows the user to manipulate the data that has been collected in each module. This tool is customizable by user and can be exported as a csv or xls file.
    - **Columns**: Columns are the field names that can be found within each module. The columns can be added or deleted depending on what data the user needs to review or monitor. The position can be moved within the view to customize presentation of data.
    - **Create**: This option is for creating custom views within the various modules.
    - **Edit**: This allows the user to edit an existing, editable List View.
    - **Share Settings**: This option allows the user to permit or deny access to their custom List Views to other users, groups or roles. The default setting is to allow access to all users.
    - **Naming Convention**: TESC has established a naming convention for List Views to assist in sorting and grouping of custom views. The standard will be: First Initial of your First and Last Name (CAPS) – Name of View (**Example:** JB – New Inquiries). If the user has common initials, the middle name initial can also be added.
- **Merging Records**: The process used to merge two or more records when found to be duplicates. Once merge this process cannot be reversed.
- **Modules**: The basic building block of the Radius relational system. Each primary module has a series of sub-modules associated with it which can be accessed from a drop down menu.
- **Organization**: Institutions or groups to which contacts are affiliated. The largest type of organizations is schools (high schools, community colleges, colleges, and universities). A contact may be affiliated with a number of organizations.
- **Programs**: The specific identification of a group, organization, or school for the purpose of tracking, organizing, and managing the application process. This must be created prior to creation of iterations.
- **Query**: See List Views
- **Radius Tenant**: See Modules
- **Registration**: See also Application
- **Requirement Module**: Module used to record and track documents required for an application. The requirements page is directly associated with a specific application iteration.

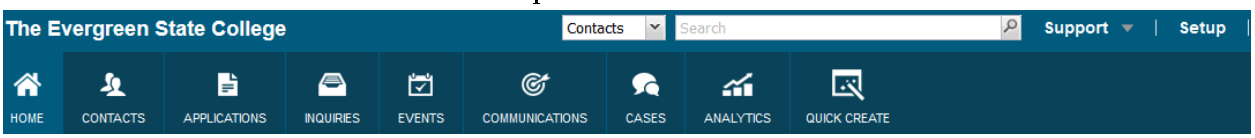
- **Requirements**: Test Scores, transcripts, essays, or any supporting documents required for processing an application.
- **Security and Permissions**: The Radius CRM has multiple levels of security and system privileges. Security can be set on the Module and Field level for Profiles, Roles, and Groups. Options exist for making fields visible or read-only as well as limiting the ability to edit or perform other functions such as emailing.
  - **Permission Categories**: Module-level, Reports & Dashboards, Import, Export, Admin, and General.
- **Self Service Center**: Customized, branded landing page designed for students to access applications in progress or submitted, update contact preferences, profile information, and change their password.
- **Target Exclusions**: A list of contact records that should not be included in an email campaign. This list is created using the Exclusions Builder which is similar to the Criteria Builder.
- **Targets**: Similar to List Views. This identifies a demographic that will be used in a Campaign or Communication Plan.
- **Tasks**: Tool to allow a user to create an action item that is to be tracked or as a reminder. The task can then be marked as complete. Tasks option can be directly associate with a number of Radius Modules but can also be created without being associate with a specific contact record. List Views can be used with tasks and listed on the Home Page as a Widget on a Workspace for easy access.
- **Test Scores Module**: Sub-module associate with a Contact Record the is used for tracking test score values for such tests as SAT, ACT, GRE, and West-E.
  - **Test Score Values**: Test score components with defined values for each type of test.
- **Users**: Individuals granted permission to access Radius by using a designated login and password. Users are assigned to a specific role and profile which defines their level of permission and security.
  - **Profiles**: Designed to create multi-level permissions and answers the question "What can users do?"
  - **Roles**: Provides structure and organization for users and answers the question "Who is the user?" Roles can be created to reflect the hierarchy of the Organization.
  - **Permissions**: The level of access to modules and fields that a user is given.
- **Widget**: Module specific list views that are added to a Workspace.
- **Workspace**: An area or tab that can be added to the Home page or Contact Record to provide ease of access to data for a Module.

RADIUS BASICS

MODULES

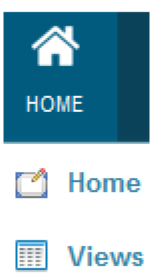
Radius is a relational customer relations management data system designed like a spider web with all modules being built off of the Contact Module. These modules are managed via the Setup portion of the system.

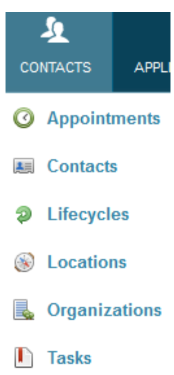
Each module can be accessed from the top menu bar found on the Radius main screen.

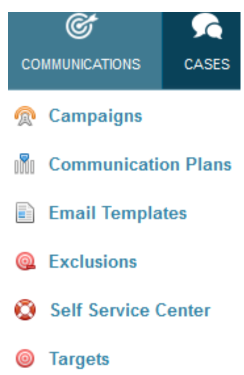


SUB-MODULES

Allows users to access various parts of the CRM where an action can be taken. Some sub-modules will be found under multiple modules due to the relational aspect of Radius. A few examples are listed below:







USERS, ROLES, AND PROFILES

- **Profiles** allow the administrative user the ability to manage module-level permissions for system users. It is at this level that the administrator is defining "What can the user do?"
- **Roles** provide structure and organization of new user accounts, and allows for the duplication of the Organization-wide hierarchy. For this reason, each newly created account must be assigned a single user role. It is at this level that the administrator is defining "Who is the user?"

- **Users** are created by completing the following sections: User Information, Address Information, Locale Information, Password Protection, and Mail Profile. Each user is assigned a **Role** and **Profile**.

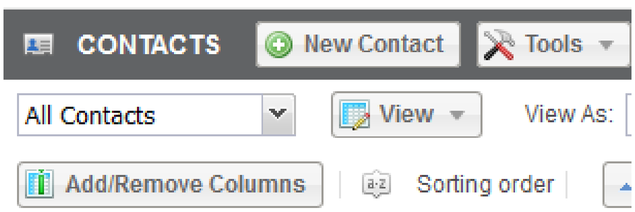
Examples:

User Name	Role	Profile
Clarisse Leong	Admissions Counsel	Counselor
Tyler Jass	Admissions Counsel	Event/Counselor

COMMON TOOLS AND FEATURES

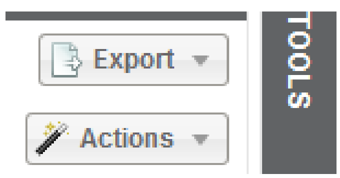
Modules have a number of common features and tools. Among these are:

- List Views
- Actions
- Tools
- Export
- Add/Remove Columns



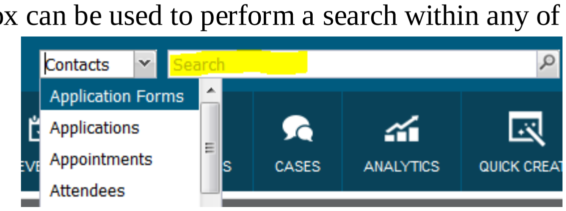
(far left and middle of screen)

(far right of screen)

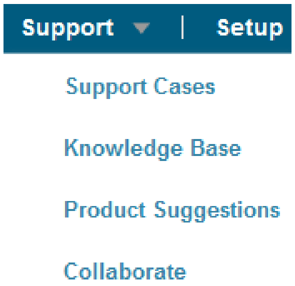


OTHER HELPFUL ITEMS

(1) Top menu search box can be used to perform a search within any of the Modules without opening that specific Module.



(2) At the top of the screen you can access a variety of Radius Support options. Clicking on any of these choices will redirect you to **Compass**, the Hobsons collaborative, support program.

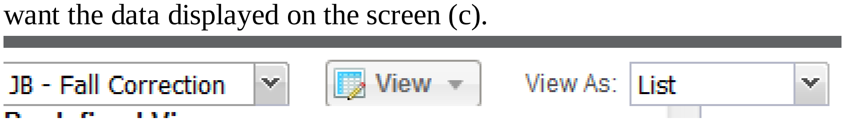


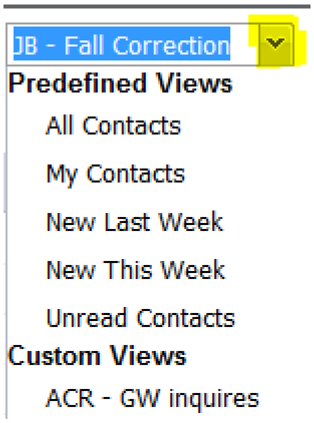
LIST VIEWS AND TARGETS (Capturing Your Data)

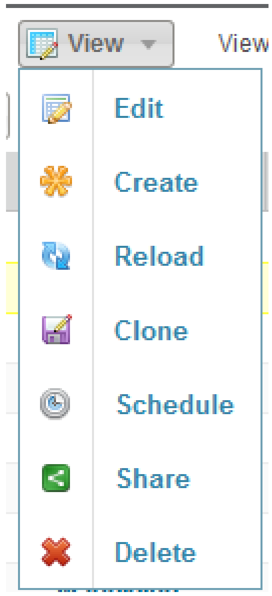
LIST VIEWS (Internal)

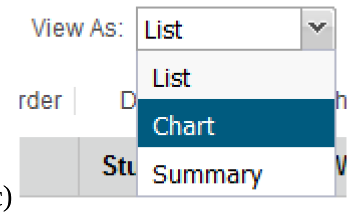
List Views functionality within Radius provides the user with the ability to quickly and efficiently access, manipulate, and use the various pieces of data that have been collected. While the List View functionality exits across Radius, each view is subject to user customization. Within each module the user is provided the ability to customize the columns of viewable data that is relevant to her/him. IT is important to note that a generated list of data directly correlates with the module where it is accessed.
For example, the Contacts List View presents a list of Contacts; The Cases List View presents a list of Cases, etc.

Each Module has Predefined Views and allows for creating Custom Views (a). From the View down arrow (b) you have a number of options available. Once you chose your View, you can select how you want the data displayed on the screen (c).



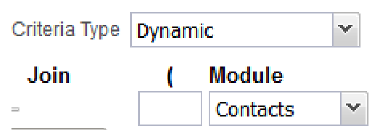
(a) 

. (b) 

(c) 

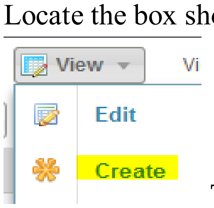
Guidelines for creating new Views:

- "Naming Convention": Begin with your first and last name initials (capped) followed by a dash (-) when creating the View Name. 

(Ex: JB – New Prospects)
- "Criteria Type":
  - The majority of your views will be "Dynamic". This will allow for additional of new records that meet the specific criteria for that view. 

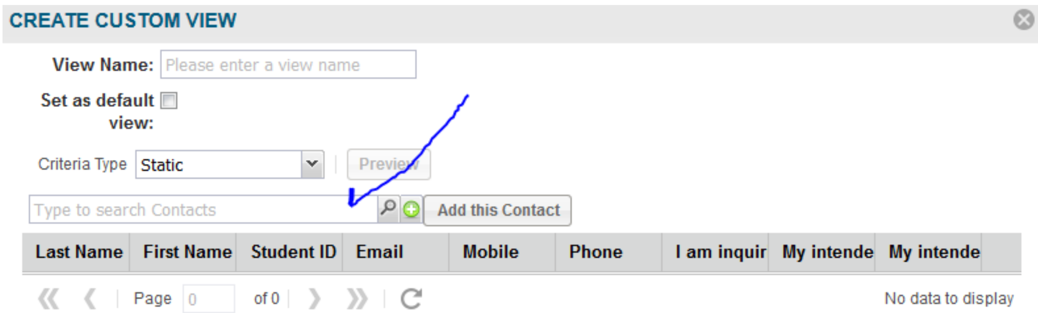
  - A "Static" view can be used if wanting to follow a specific inquiries or applicants. This will be determined by the criteria selected when creating the view. No new names will be automatically added to this view; however, you can add additional names individually if you desire. 

- **Building Static Views**

  Locate the box shown below with "View" and a down arrow. Click on the arrow and select 

This will open the screen below.

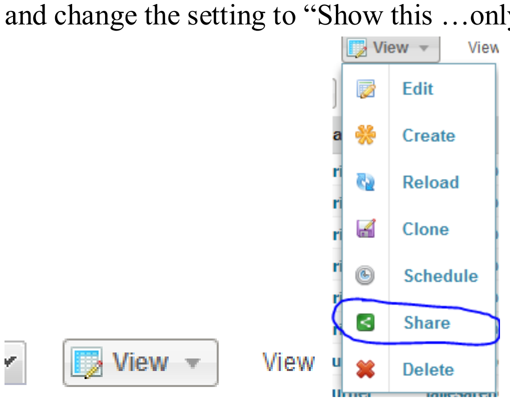
  In the box at the top called "View Name", name the custom view you are creating using the established naming conventions.



The Statics View will track a specific list of contact records determined by the user and are added at the “Add this Contact” box. Contact Records must already exist in the Contacts Module to be added. If the Contact Record is not found, create first in the Contact Module. DO NOT use the “Quick Create” feature. After created the user can edit the Static View and add the new Contact.
Note, new contact records added to the CRM in the future will not be automatically added to the Static View but can edit be added manually using the edit view feature.

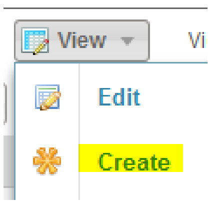
When complete, click save at the bottom of the screen.

- “Sharing” a View: After saving your new custom view, you will have the option to **<u>Edit Accessibility</u>** of you view. This allows you to determine who can see and use this view. The default setting is “All Users…”. It is recommended that you go back into the “View” down arrow and change the setting to “Show this …only to me”.



- **Building Dynamic View Criteria**

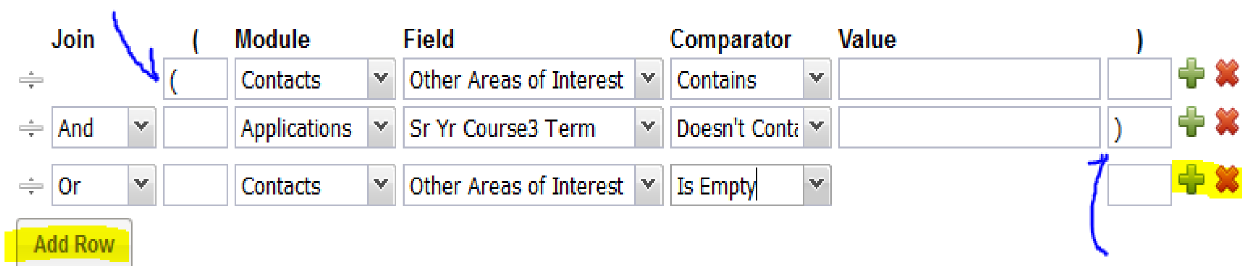
Locate the box shown below with “View” and a down arrow. Click on the arrow and select “Create”.



This will open the screen below.

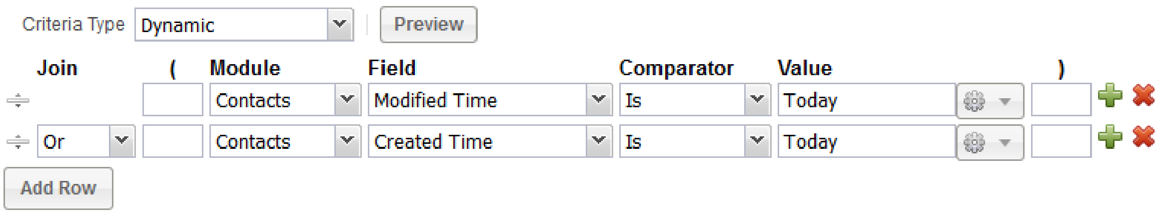
In the box at the top called “View Name”, name the custom view you are creating using the established naming conventions.

You are not ready to add the criteria that will define the data you wish to display in your view. Depending on the Module you are in, you will have access to all associated Modules to assist in building your criteria. By clicking “**Add Row**” or the symbol you are able to add rows for additional criteria. Using the symbol will delete a row. **Parenthesis** can be used to group data to be looked at together by the system. This criterion is **Joined** by using “**And, Or,** or **Minus”**.

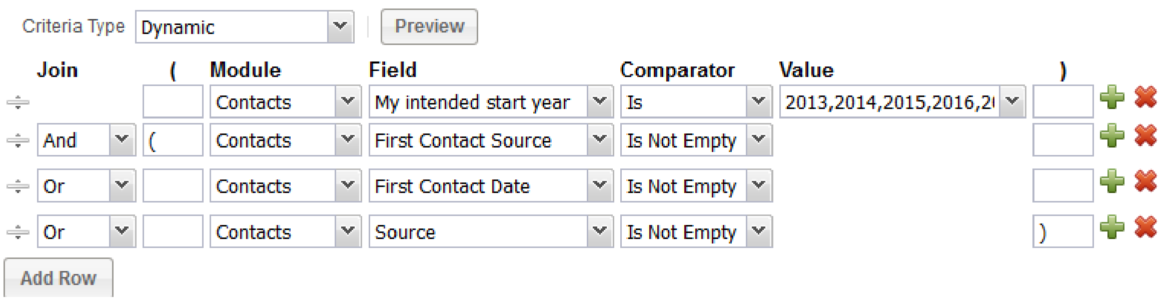


- Building blocks for dynamic view logic:
  - **Parenthesis (or Brackets)**: Used for grouping lines of criteria in the logic. There can be more than one set of grouped criteria within a view. (Find this set of data first, then find this data, etc).
  - **Join**: Operator used to connect the lines of logic and direct how the criteria is evaluated. (Operators are: And, Or, Minus)
  - **Module**: Select the module that contains the data you wish to pull. (Where the data lives.)
  - **Field**: Select the data field(s) from the drop down list to begin to narrow the broader CRM data to provide the desired view (query). (What data you want to see.)
  - **Comparator**: This field “tells” the view how to treat, or search for, the field data and is also known as the “criteria operator”. The field type will determine which operators are available. (How you want the CRM to search for the data.)
  - **Value**: This is the field value that you want included, or excluded, in the view.

Examples:

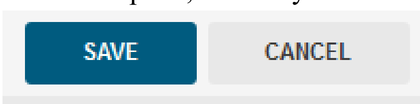


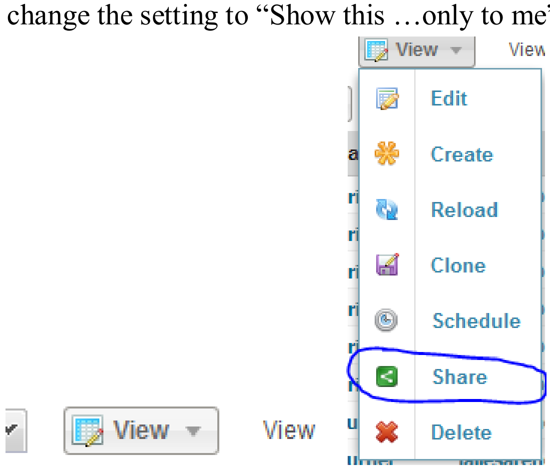
(1)

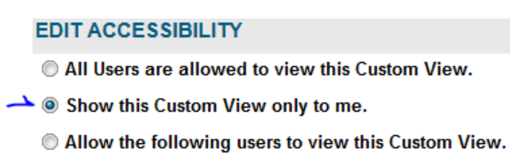


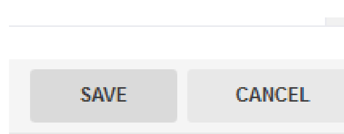
(2)

When complete, “Save” your new custom view by clicking the save button at the bottom.



- “Sharing” a View: After saving your new custom view, you will have the option to **Edit Accessibility** of you view. This allows you to determine who can see and use this view. The default setting is “All Users…”. It is recommended that you go back into the “View” down arrow and change the setting to “Show this …only to me”.
  - 

  - 

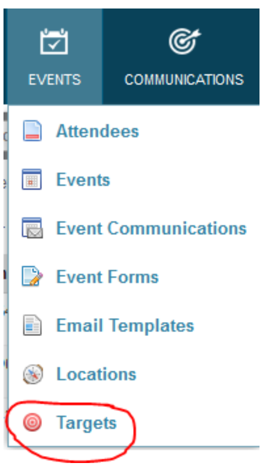
TARGET (External)

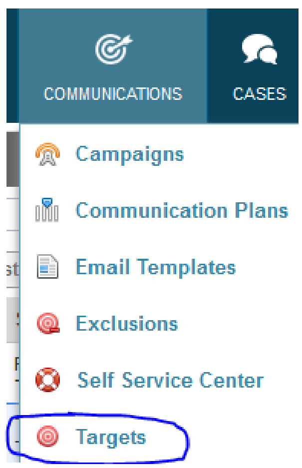
Target is a group of contacts that meet certain user-specified conditions. Targets can be used to send email campaigns or event invitations to a group of contact records at one time. There are two types of targets within Radius: Static and Dynamic.

- Static Target: Allows you to define exactly which contacts to include in your target list. You must add contacts manually to this list.

- Dynamic Target: Allows you to define a target list based upon criteria. This list changes automatically based upon which contact records meet the established criteria at any given time.

Targets must be build PRIOR to being added to a campaign or event communication. The process and steps for creating, or building, a Target View is the same as for building a List View. (See steps above.)

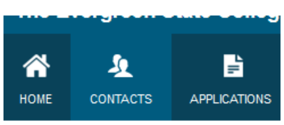




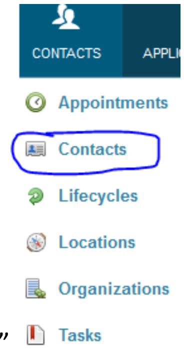
CONTACT MODULE

The Contact Module is the location for all individual records that are created. These individual records are referred to as **Contact Records**. Contact Records may include inquiries, applicants, parents, school counselors, and as well as other types of contacts.

All other modules are built upon the Contact Module which is the key concept of a **relational database system**. This directly associates all data back to the Contact Record.



To locate the Contact Module, click on “CONTACTS” on the top main menu

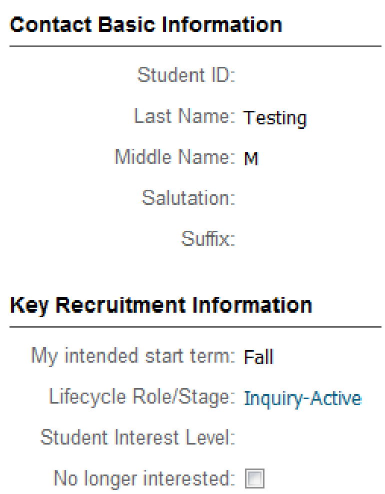


In the drop down menu, find and click on “Contacts” . This will take you to the main Contact Module screen and the listing of Contact Records.

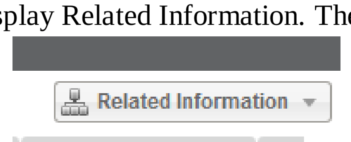
3	☐	Aaberg	Anna	Freshman	Megan Rosenberg
4	☐	Aagaard Shively	Rio	Freshman	Grace Fisher

The user will be able to create cusotmize list views (see List View section for instructions).

The Contact Module will contain both system and custom fields which are used for collecting, tracking, and reporting data. These fields are separated and organized into Sections to make it easier for entering, editing, and locating specific information.

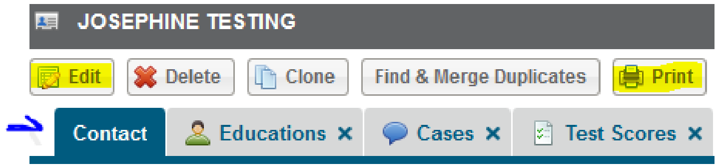


The Contact Module can be customized to display Related Information. The available options are found in a drop down list at the far right of the page.



Once selected, the related Modules will appear across the top of the Contact Record and can be rearranged to customize the look for each user.

The user will also see additional options such as printing and editing. Access to these options are tied to the specific permissions of each role and may not be available to all users.

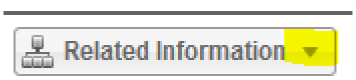


EDUCATION MODULE

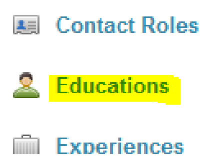
The Education Module contains data related to all institutions, high school or post-secondary, attended by a Contact Record. This information can be added by from an electronic form, through the integration process, or individually by hand.

To look up education information for a specific Contact Record. Search for the Contact Record and select the Related Information Option “Educations” if you do not already have this as a top tab on your Contact Record screen.

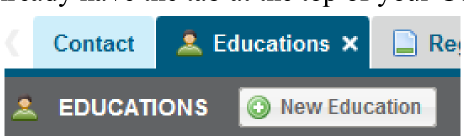
(far right)



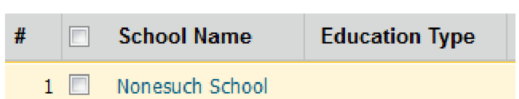
(in the drop down)



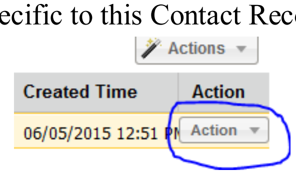
If you already have the tab at the top of your Contact Record, click on “Educations”.



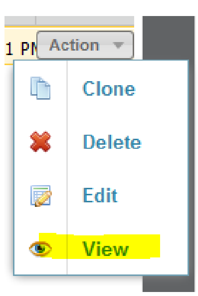
Each institution the Contact has attended will be listed. (1) Find the institution you want to review and (2) go to the far right of the listing to locate “Action”. (3) Click on the down arrow and select “View”. (4) This will take you to the school information specific to this Contact Record.



(1)



(2)



(3)

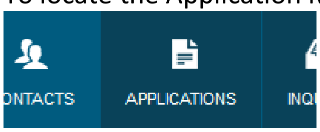

School Information

Contact Name:	Bria Hopkins	School Owner:	Radius Connections
School Name:	Nonesuch School	Education Type:	
Start Date:		To Date:	
Most Recently Attended School:	☐	GPA:	
HS Grad MMDDYYYY:	05/01/2014	Have you taken the GED:	
Graduation Year:		GED MMDDYYYY:	

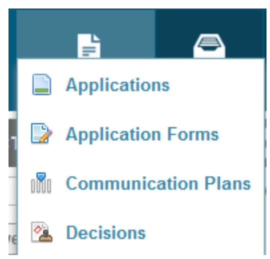
(4)

APPLICATION MODULE

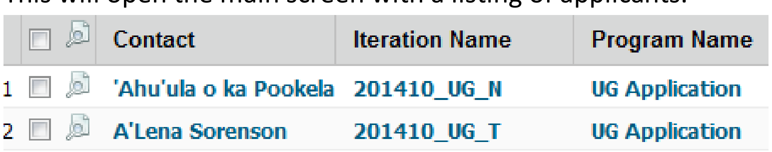
To locate the Application Module, click on “APPLICATIONS” on the top main menu.



In the drop down menu find and click on “APPLICATIONS”.

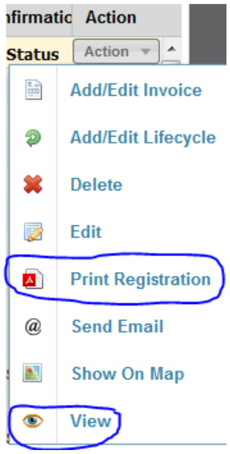


This will open the main screen with a listing of applicants.



	Contact	Iteration Name	Program Name
1	'Ahu'ula o ka Pookela	201410_UG_N	UG Application
2	A'Lena Sorenson	201410_UG_T	UG Application

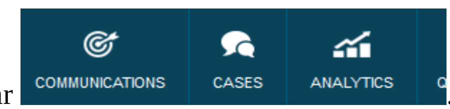
The user will be able to create customize list views (see List View section for instructions).
On the far right of the list look for the “Action” botton and click on the down arrow. From this drop down list you will be able to “Print Registration (Application)” and “View” the details of a specific contact records application.

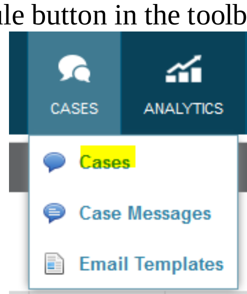


CASES AND CASE MANAGEMENT

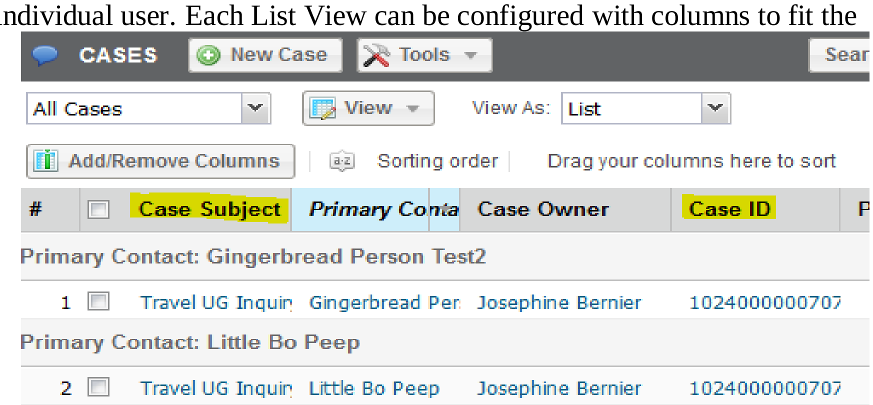
Cases are designed to keep a record of any/all interactions that a contact has with the institution (outside of applications and event registrations). A Case is automatically created when someone fills out an inquiry form over the web or when an inbound email is received. The user can also manually create a Case for a contact.

1. Finding or creating a Case from the main screen.

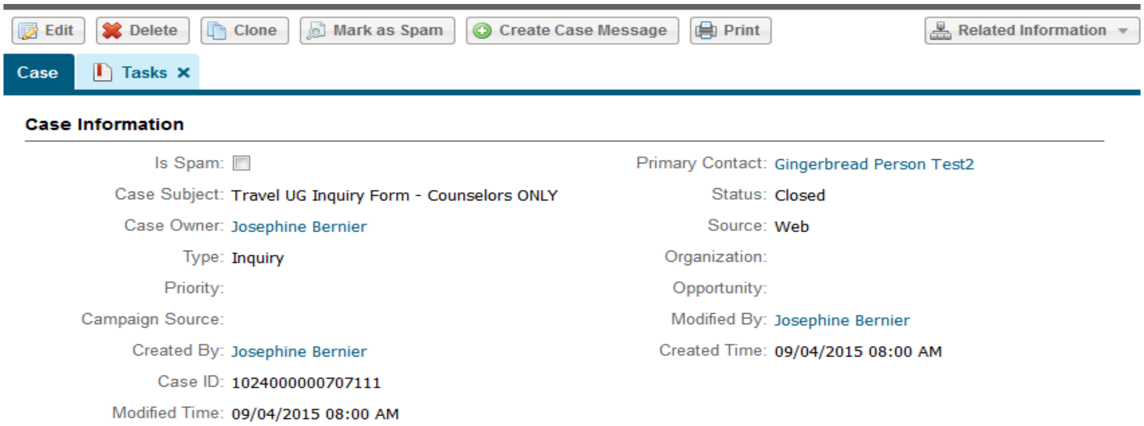
   a) Click on the Case Module button in the toolbar .

   b) In the drop-down menu,  and select Cases.

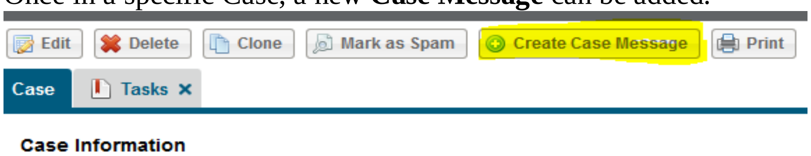
   c) The user will be on the Cases – List View screen which will automatically load with “All Cases” unless changed by the individual user. Each List View can be configured with columns to fit the query and required data.



   d) Clicking on the Case ID or Case Subject will allow access to the specific case itself. Within each Case, depending on the Cases page layout, you will see information about that particular Case.



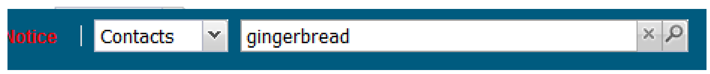
e) Once in a specific Case, a new **Case Message** can be added.



2. Finding or creating a Case from within a student record.

a) Search in Contacts for the record you want to add a case or review an existing case. In the Contacts Module sub-menu bar:

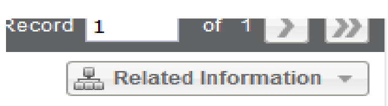
Or at the top of the screen:

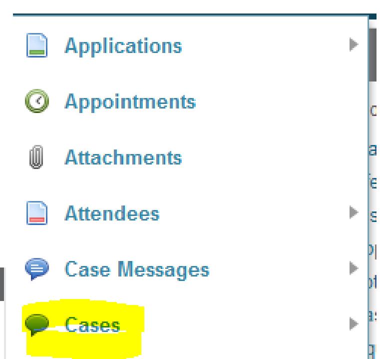


b) Locate desired record and click the Last Name to access the record detail.

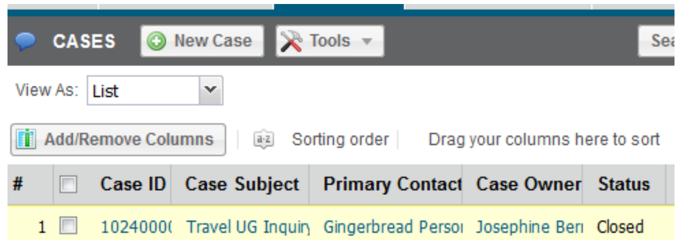
c) Access Cases through the Cases workspace

or under Related Information.

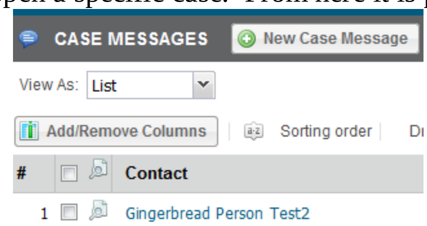




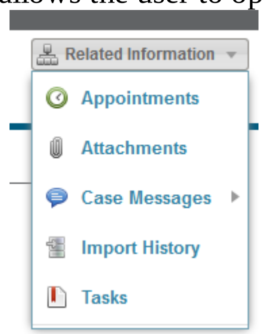
d) All cases for this record will be listed.



Click on the Case ID to open a specific case. From here it is possible to review Case Messages or add a new Case Message.

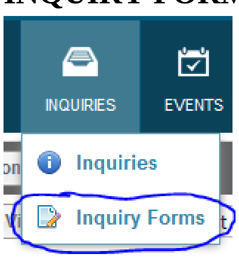


At the top right-hand corner of the Case, clicking on the Related Information drop-down allows the user to open tabs to display any related Tasks, Appointments, or Attachments.



e) The user will also see any messages or comments regarding a given Case at the bottom of the layout. Within each Case, the user has the ability to add or respond to messages, add comments, and create Tasks or Appointments.

INQUIRY FORMS



Forms created to collect data from prospective students who are interested in attending the institution or specific program. For Evergreen, this form is also adapted to be used for creating or adding prospective student information that is received in non-electronic formats, such as, inquiry cards, emails, or phone calls.

(Part II)

EVENTS MODULE

COMMUNICATIONS MODULE

COMMUNICATION PLANS

CAMPAIGNS