



Talisma Operation Guide

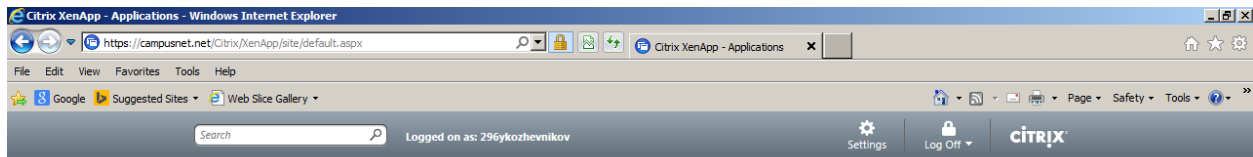
How to run reports in Talisma, showing import results for purchased files.

Step One

Login to Talisma IP → <https://campusnet.net>

Use your login ID and Password to log on to the website

Click on CRM- TRAIN (or CRM-LIVE depends where import job was run)



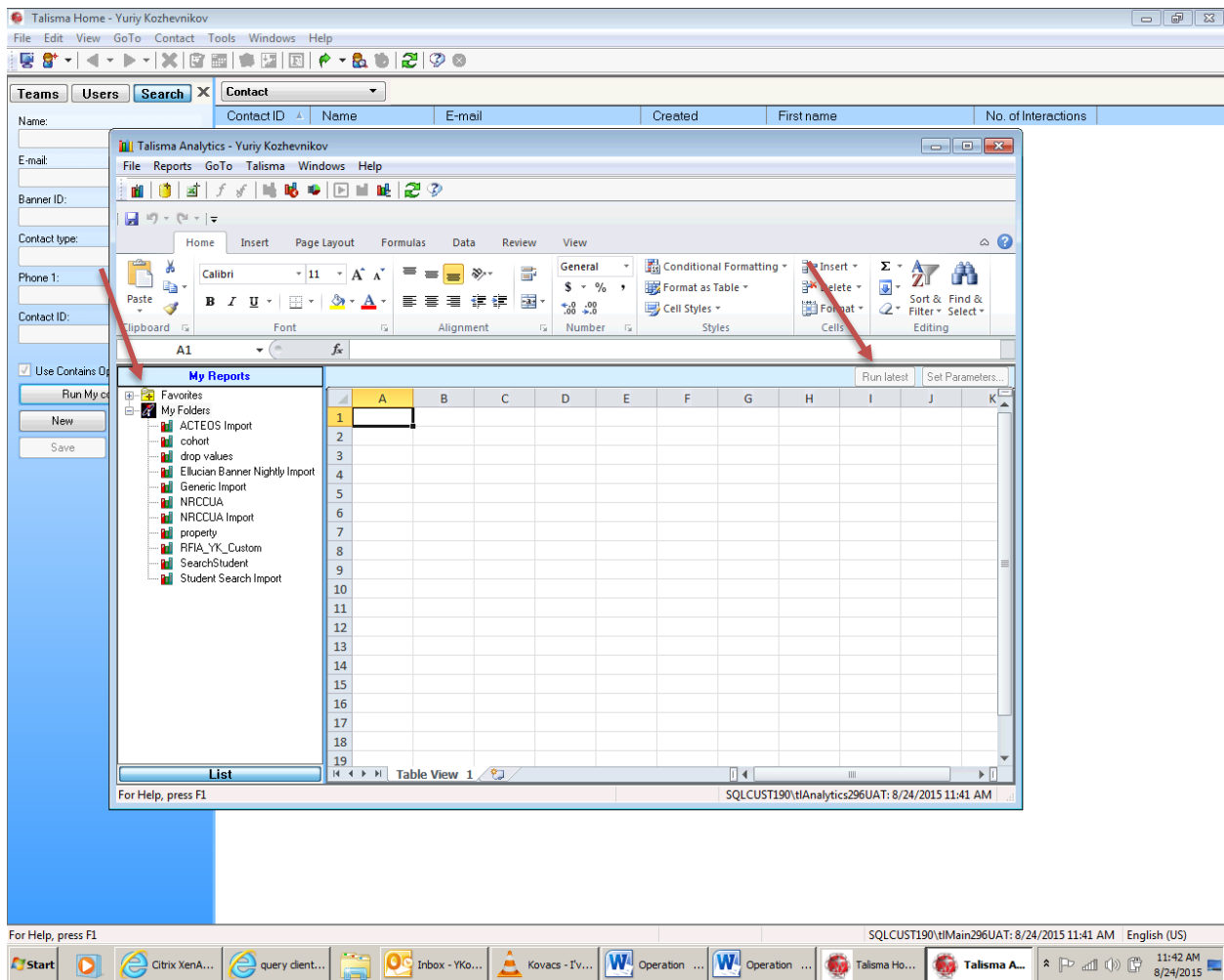
Step 2

See client window. Go to → “Go TO → Analytics”

The screenshot shows the Talisma Analytics application window. The title bar reads "Talisma Home - Yuriy Kozhevnikov". The menu bar includes "File", "Edit", "New", "GoTo", "Contact", "Tools", "Windows", and "Help". The "GoTo" menu is open, showing options: "Object", "Home", "Analytics", "Chat", "Phone", "Outbox", "Inbox", "Trash Can", "Workspace", "Business Administrator", "MyTalisma", and "KB Administrator". A red arrow points to the "Analytics" option. The main content area is a table with columns: "Name", "E-mail", "Created", "First name", and "No. of Interactions". The table is empty, with the text "There are no items to display" in red. The left sidebar contains a "Teams" tab, a "Use" button, and several input fields for "Name:", "E-mail:", "Banner ID:", "Contact type:", "Phone 1:", and "Contact ID:". Below these fields are checkboxes for "Use Contains Operator" and a "Run My contacts" dropdown menu. At the bottom, there are buttons for "New", "Advanced...", "Save", and "Save as Filter...". The Windows taskbar at the bottom shows the Start button, Citrix XenApp - Appl..., Inbox - YKozhevnik..., Kovacs - I've Seen ..., Operation Guide, and Talisma Home - Y... The system tray shows the date and time: 11:38 AM 8/24/2015.

Step 3

See report window



Depends on the type of import highlight ??? (Yuriy)

ACTEOS import for ACT file import

NRCCUA Import for NRCCUA import

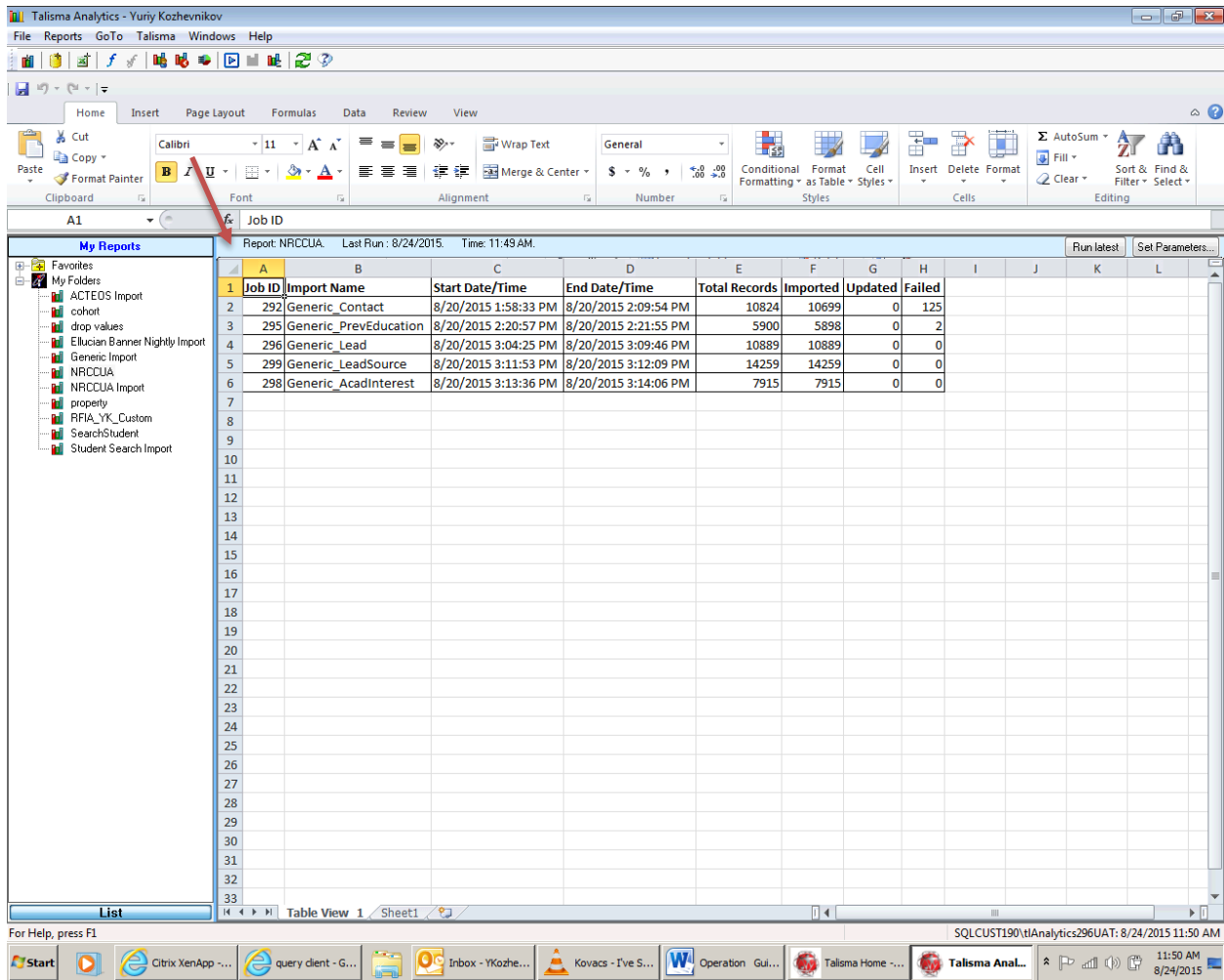
Student Search for SAT import

Generic Import for Generic Import

Click button "Run Latest"

Step 4

See report in the report window



The screenshot displays the Talisma Analytics interface. The main window shows a report titled "Report: NRCCUA" with a last run date of 8/24/2015 at 11:49 AM. The report is presented as a table with the following data:

Job ID	Import Name	Start Date/Time	End Date/Time	Total Records	Imported	Updated	Failed
292	Generic_Contact	8/20/2015 1:58:33 PM	8/20/2015 2:09:54 PM	10824	10699	0	125
295	Generic_PrevEducation	8/20/2015 2:20:57 PM	8/20/2015 2:21:55 PM	5900	5898	0	2
296	Generic_Lead	8/20/2015 3:04:25 PM	8/20/2015 3:09:46 PM	10889	10889	0	0
299	Generic_LeadSource	8/20/2015 3:11:53 PM	8/20/2015 3:12:09 PM	14259	14259	0	0
298	Generic_AcadInterest	8/20/2015 3:13:36 PM	8/20/2015 3:14:06 PM	7915	7915	0	0

The interface includes a ribbon with tabs for Home, Insert, Page Layout, Formulas, Data, Review, and View. The left sidebar shows a "My Reports" tree with various folders and reports. The bottom status bar indicates the current sheet is "Table View 1" and the system time is 11:50 AM on 8/24/2015.

To access report in the Excel format File go to “menu” -> File -> save as Excel format

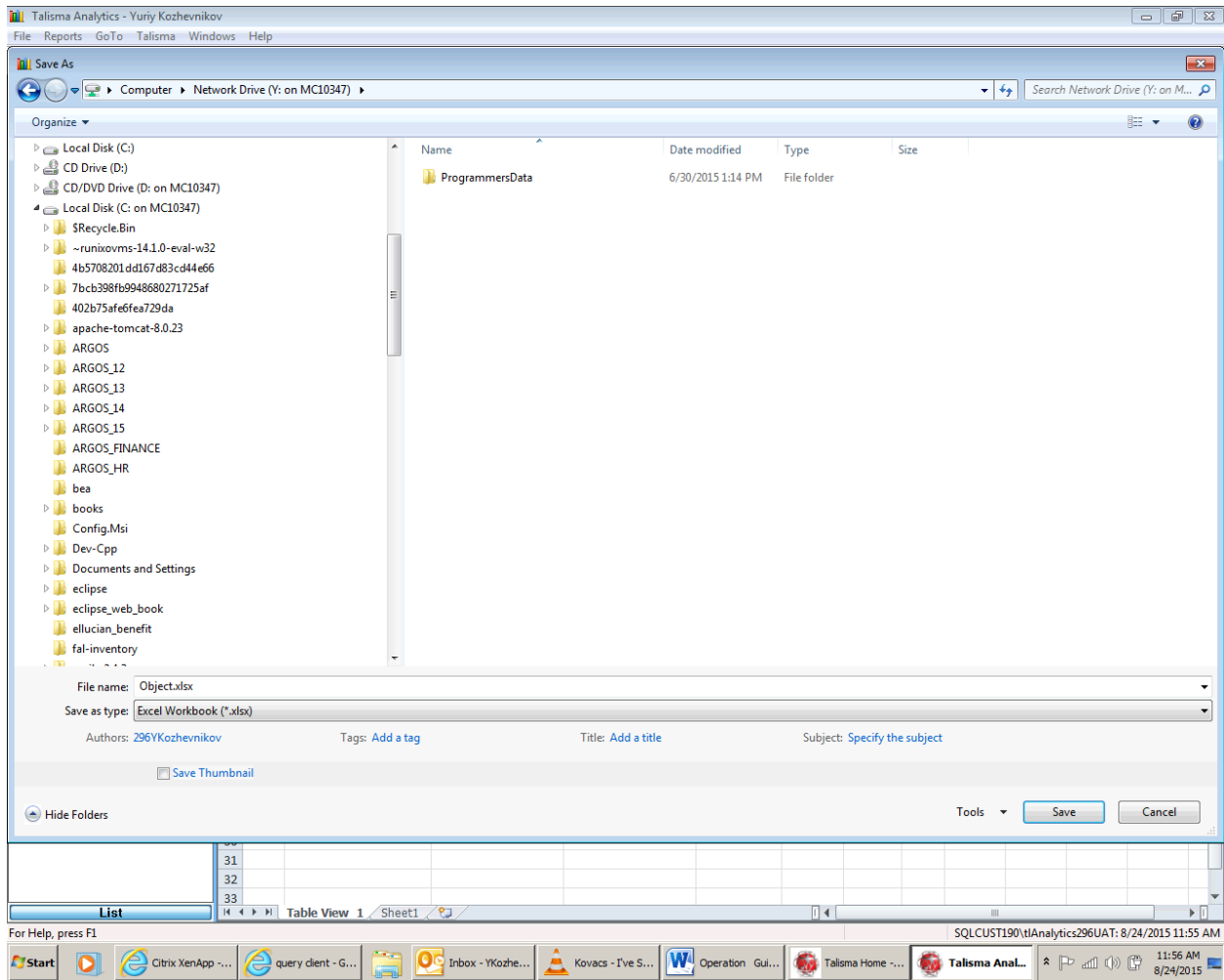
The screenshot shows the Talisma Analytics application window. The menu bar includes File, Reports, GoTo, Talisma, Windows, and Help. The File menu is open, showing options like New, Save, and Save As Excel File... The main window displays a report titled 'b ID' with columns: ID, Import Name, Start Date/Time, End Date/Time, Total Records, Imported, Updated, and Failed. The data is as follows:

ID	Import Name	Start Date/Time	End Date/Time	Total Records	Imported	Updated	Failed
292	Generic_Contact	8/20/2015 1:58:33 PM	8/20/2015 2:09:54 PM	10824	10699	0	125
295	Generic_PrevEducation	8/20/2015 2:20:57 PM	8/20/2015 2:21:55 PM	5900	5898	0	2
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298	Generic_AcadInterest	8/20/2015 3:13:36 PM	8/20/2015 3:14:06 PM	7915	7915	0	0

The status bar at the bottom indicates 'Table View 1 / Sheet1' and 'SQLCUST190\tdAnalytics296UAT: 8/24/2015 11:52 AM'. The taskbar shows the Start button and several open applications including Citrix XenApp, query client, Inbox, Kovacs, Operation GUI, Talisma Home, and Talisma AnaL.

Step 5

Navigate to your files and Click **“Save”**



Step 6

Send email to clients with Attached report file.