

## Workflow Team Minutes

October 13, 2009 2:00pm – 3:00pm  
(☎) – (800) 893-8850 • PIN: 6384637

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### Attendees

Pat, Patty, Mary, John, Crystal, Barbara, Jane, Brigitte, Mike, Colleen

### New Business

### Follow up tasks and/or TR's

#### In Progress

1. This schedule change notification WF was in PREP for user testing. Pat was going to research the WF (was the schedule info coming from the right place?) and potentially incorporate the changes suggested. What will it take to get this one ready for PROD?

Verified from Daniel that he is pulling the info from SSRMEET instead of start of term. Looked back at history, there were multiple people making mods at the same time, so did a test today of the workflow confirmation email and 3 screen shots of banner screens, and sent out to the CCS group. Mocked up a draft - what the email looks like and in photoshop rearranged the data how they wanted it to look, asked if it was what they were looking for. Some confusion on the part of term vs dates on the mtg line on ssrmeet- should we have a date for each meeting line? Date, location, day of week. Will wait for user responses.

2. ACG review is in PREP. Was prompting student to fill out a checklist, print it off and scanning it into OnBase. Is ROAHSDT populating correctly now in PREP? Any resolution on the inability to use a quickflow in workflow (automation?) Workflow prompts them to go into three different banner forms. Some problems with it opening it up as a menu block vs a key block population. What will it take to get this one ready for PROD?

Unable to use quickflow until release 8 or higher. Some of the functionality is in banner, but it will be a while. Mike didn't like how the data was patched into this, so Pat sent email to Terry Hartman. Mike discussed automation with Carolyn Weaver.

3. Web application notification - working fine in PROD. Crystal was working on a TR to break of the non-degree seeking web apps so they get a different email.

Notes below from the joint Reg/Admiss mtg:

Registration Team and Admissions Team joint meeting - Thursday March 12 at 2:30 pm

Colleen, Jane, Sandy, Fran, John, Charesse, Peggy, Pat, Lora, Mary, Diane, Barbara, Libby, Caty, Crystal, Jenny, Deema

1. The discussion regarding the **non-degree application** was quite lengthy. The Reg team will work on ideas to the wording and distribute via the list. We cannot globally call it intent to register as not everyone uses it as such. The

email message from Crystal is included in these minutes with her first stab at the wording.

- **Technical issue: Non degree seeking record will move to the top of your degree seeking record and could cancel your financial aid.**
  - **Wording will be crucial so that students understand what they are about to do.**
  - **All campuses do use the same process - all emails are generated the night they register.**
2. Crystal started the task request to come up with a better acknowledgment for the various application types. **This would use the email address they supplied.**

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Note – Recruit team has a TR – to put non-degree seeking applicants into EMAS and then into a communication plan. (this could be used for the additional notifications discussed)

3. **Placement test scores** –The discussion on how long are scores active. This is a bit challenging to pin down since it is different at all MAUs for example: this is a departmental decision at UAA; pre-req checking requires the placement scores; [Mary Gower is working on collecting this data.](#)

4. **Transcript request between campuses** – Caty is receiving official transcripts from students applying from other MAUs who are requesting official transcripts be sent to the new institution. This seems rather wasteful since the transcripts will not be scanned into Onbase because they are in the database.

- typically a graduate school issue
- Not sure if there is anything we can do to prevent this

**Thanks for taking the time to meet together!** Crystal's email on the next page

**(From Crystal)**

Hi everyone!

I am working on the non-degree seeking work flow task request, and I need a little assistance. I need the **APPLICATION TYPE** that shows on SAAEAPS when a student submits a non-degree seeking app for your areas. At the last meeting I got XA and XS for UAA and UAS, but those are the level codes, not the application type on SAAEAPS. I think the level code shows up when that application is pushed to I started looking in STVWAPP and saw Anchorage had A3 and AI for non-degree seeking, but then started seeing a bunch other non-degree seeking codes. So, if you could provide me with the code or codes actively used for your non-degree seeking applications from your areas, that would be great.

Second thing on this task request is the wording for the email message. Below is my first draft.

Thanks!  
Crystal G

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### **Welcome Olivia!**

We received your request to register as a non-degree seeking student for the following campus and term:

Campus: UAF - Tanana Valley Campus  
Term: Summer 2009

Just as a reminder, this form is for students taking classes solely for the purpose of recreation, personal interest or professional development. Non-degree seeking students are not eligible for financial aid. If you were in a program, the completion of this form could have removed you from your program. To begin your registration process, go to [UAOnline](#) and click on Class Schedule to search and register for classes. If you have any questions, please visit our [Records/Registrar Contact](#) page and get in touch with the office at the appropriate campus.

(the Records/Registrar Contact will link to [https://uaonline.alaska.edu/banprod/owa/bwsk2ctc.P\\_DisplayContacts?pDept=Records](https://uaonline.alaska.edu/banprod/owa/bwsk2ctc.P_DisplayContacts?pDept=Records)) (UAOnline would be a link to <http://uaonline.alaska.edu/>)

This is an automated message. Please do not reply to this message.

Task request is in the Reg team queue – working the wording in the email. Reminder that people that fill out the NDS applications are getting the same email as degree seeking students.

#### 4. Others?

Some confusion – some times workflow launches a new banner session and some times it does not – if it is on GUAGMNU, the next time you click on an item it will reuse that banner session, otherwise it will start a new session.

Question – We are trying to not use workflows to do basic email distribution. However, what do we do in the mean time until the other mechanisms of sending triggered emails are available? Financial aid has a process that will fire off emails. SORREML (?) in banner that will allow you to send emails, too. Concern with workflow to send emails- if the only thing you use it to do, it's overkill for just sending an automated emails, similar to using a chartered flight to deliver a single letter from Juneau to Fairbanks. There is a

lot of overhead creating email distributions in workflow instead of automated processes. However, sessions at banner all talked about their schools using workflow for distributing emails. It is the most common usage of workflow stated by clients at summit, sungard keeps saying "start simple". Final thoughts – use the tool we have (aka workflow) until the other tools have been fully researched and are made available to the collective "us" to use.

## In Discussion

1. Email student when they perform ANY type of registration function on UAOnline – acknowledgement of transaction;  
This WF idea was discussed at the Reg meeting and received approval to start the Task request for a workflow to be produced.  
  
This is top workflow priority for a new WF - Transaction tracking workflow will get written up by Reg team.
2. If a new ~~dept code~~ subject code (?) is added or changed on STVDEPT, trigger a workflow to staff in charge of maintaining course information in Banner  
These might not end up being workflows. Looking to not make full fledged banner workflows out of these because of the overhead. Finaid has process to send out automated mass emails, or schools have database triggers (demo at past Summit) and using AppWorx to schedule that. It's only batch jobs that would go in the scheduler.  
  
Mary will send this to CCS team for refining. Sent to Jan 3/10/09, next CCS meeting is 4/09/09.
3. If a new major code is added or changed on ~~STVMAJR~~ SOACURR, trigger a workflow to staff in charge of maintaining web applications  
This WF idea was discussed at the last Admis meeting and received approval to start the TR process to have a workflow developed.  
These might not end up being workflows. Looking to not make full fledged banner workflows out of these because of the overhead. Finaid has process to send out automated mass emails, or schools have database triggers (demo at past Summit) and using AppWorx to schedule that. It's only batch jobs that would go in the scheduler.
4. If a SSN is created as the UAID rather than a 3##### on SPAIDEN for a student, trigger a workflow to appropriate MAU manager for review and identification of user training  
Could be an email process instead of a workflow.
5. If an equivalency record has been added or changed on SCADETL or SSADETL, trigger a workflow to DegreeWorks staff responsible for maintaining the equivalency tables on DegreeWorks

**Next meeting: May 5 at 2:00pm.**

**Proposed workflows (ideas from Summit)**

- 1) Orientation office – would work with the business office to add a charge for orientation to the students account and send an email to the student.**
- 2) Send email to the students regarding the change in status on their application.**
- 3) As items come in for the checklist and/or if there are existing items still out there, email them what's missing.**