Unit Missions

🏅Registrar Mission

Mission statement
The Registrar's primary focus is serving students, faculty, and staff by maintaining academic records and ensuring integrity of said records, evaluating degree requirements for commencement, assisting students who are military veterans, certifying all athletes for NCAA eligibility, providing traditional and online registration processes to better serve students.

User Outcomes

Registrar 01 UO: Resources for Students
Start: 7/1/2012
End: 6/30/2013

User Outcome
Students have the access to skills and tools that allow them to obtain additional resources to make more informed decisions about their educational paths and goals.

Data Collection (Evidence)
1. **Graduation Applications:** Data are tracked within the Registrar's office through the graduate application system on a semester-by-semester basis due to the December and May graduation timelines.
2. **Summer Orientation Sessions-Registration Skills:** Data are tracked for summer orientation by: (1) the number of sessions offered and (2) the number of PIN numbers given to the orientation leaders prior to each orientation session.
3. **General Studies (GST) Registration Skills Sessions:** Data are tracked for the GST sessions based on: (1) the number of classes that schedule appointments with the Registrar to conduct a Registration Skills Session and (2) the number of students who preregister on Preregistration Day.

Results of Evaluation
The data below shows the number of applications processed through our online application system

Academic Year	December	May	Total
2012-2013	374	422	796

Based on the number of students served, the data below represents the number of freshmen and transfer students who obtained the proper skill sets to register for classes early during preregistration.

	Classes Served	Students Served	Pre-Registered Students	Pre-Registered within 1st Week of Class
Fall 2012 GST Course-Registration Skills Session	21	315	230	1636

	Number of Sessions Offered	Students Served & Pre-registered
Summer 2012 Orientation-Freshman Sessions	4	240
Summer 2012 Orientation-Transfer Session	2	160

Use of Results and Recommendations
Based on the use of the results. The Registrar's Office will continue to:

1. Promote the online graduation application process, which creates efficiency in the Registrar's Office and allows students to access information quickly.

2. Collaborate with Student Life to promote the Registrar session and get PIN numbers for all students attending the session to allow them to register

3. Work with the GST coordinator and GST instructors to provide registration skills sessions for all students enrolled in the course.

Related Items
SP1.Ind06: Advising -- access to improved, comprehensive, and directed/targeted advising

SP4.Ind08: Campus Efficiencies

Unit Goals

Registrar 2012_02: Online Transcript Payment

Start: 7/1/2011
End: 6/30/2013

Unit Goal
Provide an online payment option for transcript requests to allow for a more efficient and customer-friendly experience.

Evaluation Procedures
Track the online payment option to see how many students use online payment versus the in-office payment process.

Actual Results of Evaluation
The online payment process was implemented during the 2012-2013 academic year. The in-office payment process was utilized more often than the online payment process throughout the 2012-2013 academic year.

Term	Number Processed	Number Processed Online
Fall 2012	1826	163
Spring 2013	2824	66
Total	4650	229

Use of Evaluation Results
The online payment process had some technical issues in Fall 2012, which caused students not to able to use the process as originally projected. The technical issues were resolved throughout the term, and as a result, more students used the online payment option. However, the Registrar's Office continuously researched other transcript options throughout the 2012-2013 year. This research demonstrated the value of switching to Scripsafe to manage both incoming and outgoing transcripts. Scripsafe will be implemented as the transcript processing method during the 2013-2014 academic year. The in- house option will remain available for walk-in students. All online requests will be processed through Scripsafe.

Related Items
SP4.Ind08: Campus Efficiencies

Registrar 2012_03: Transcript Request Online Option

Start: 7/1/2011
End: 6/30/2013

Unit Goal
Provide capability of submitting transcript requests online.

Evaluation Procedures
The Registrar's Office coordinated with the Office of Information Technology (OIT) to implement the online transcript request option. The Registrar's Office tracked the number of requests received throughout the year through the Banner database.

Actual Results of Evaluation
Throughout the 2012-2013 year the Office of the Registrar processed the following transcripts.

Term	Number Processed	Number Processed Online
Fall 2012	1826	163
Spring 2013	2824	66
Total	4650	229

Use of Evaluation Results
The online payment process had some technical issues in Fall 2012, which caused students not to able to use the process as originally projected. The technical issues were resolved throughout the term, and as a result, more students used the online payment option. However, the Registrar's Office continuously researched other transcript options throughout the 2012-2013 year. This research demonstrated the value of switching to Scripsafe to manage both incoming and outgoing transcripts. Scripsafe will be implemented as the transcript processing method during the 2013-2014 academic year. The in- house option will remain available for walk-in students. All online requests will be processed through Scripsafe.

Related Items
SP4.Ind08: Campus Efficiencies

Registrar 2012_04: Online Graduation Application
Start: 7/1/2011
End: 6/30/2013

Unit Goal
Continue to monitor the effectiveness of the online graduation application process to ensure students are able to apply without error.

Evaluation Procedures
Coordinate with OIT to track the functionality of the online application process by responding to technical issues immediately when we receive them in the office so students are able to apply on a daily basis.

Actual Results of Evaluation
Throughout the 2012-2013 year the Registrar's Office tracked the number of applications received. These applications were all received online. No paper applications were utilized in the 2012-2013 academic year.

Academic Year	December	May	Total
2012-2013	374	422	796

Use of Evaluation Results
The application process creates an efficient and effective work environment in the Registrar's Office because it frees up staff time tremendously, allowing them to process applications for candidacy of degree, rather than entering application information. Although technical issues arose as a result of system upgrades throughout the year by the Office of Information Technology, the Registrar's Office was able to coordinate with OIT to rectify those issues the same business day. The application process worked well, and the Registrar's Office will continue to utilize this process and track ongoing efforts during the 2013-2014 academic year.

Related Items
SP4.Ind08: Campus Efficiencies

Registrar 2013_01: Designing Workflow Projects

Start: 7/1/2012
End: 6/30/2013

Unit Goal
Create workflows by collaborating with the Office of Information Technology to enhance the primary functions of the Registrar's Office. The following workflows will be developed:

1. Student withdrawal
2. Course add
3. Course drop
4. Course substitution/degree modification
5. Grade change
6. Graduation Notification.

Evaluation Procedures
The end product will be tested before the product is implemented campus-wide. Once the workflow is live, all processes will be evaluated using workflow reports to show how to determine the effectiveness of the workflow across campus departments.

Actual Results of Evaluation
During the 2012-2013 academic year, all workflows identified were developed and completed. Testing and implementation of the workflows have not been achieved.

Use of Evaluation Results
Since testing and implementation have not been achieved there is no data to report. However, documents that show significant progress of the development of the workflows within the Registrar's Office are provided.

- Elliminate_the_Paper_Chase-Workflow Project Presentation
- GraduationNotification_UserDirections_FINAL
- WorkflowSpecification_CourseADD_FINAL

- WorkflowSpecification_CourseDROP_FINAL
- WorkflowSpecification_DegreeMod_FINAL
- WorkflowSpecification_GradeChange_FINAL

Related Items
SP4.Ind08: Campus Efficiencies

Section IV.a
Brief Description
Narrative

The Registrar's primary focus is to serve students, faculty, and staff by maintaining academic records and ensuring integrity of said records, evaluating degree requirements for commencement, assisting students who are veterans, certifying all athletes for NCAA eligibility, provide traditional and online registration to better serve our students.

Section IV.b
Comparative data
Enrollment, CHP, majors, graduation rates, expenditures, trends, etc.
Narrative

Enrolled Students Served by Department	
Term	**GR & UG (unduplicated)**
Summer 2007	1577
Fall 2007	4091
Spring 2008	3767
Summer 2008	1594
Fall 2008	4064
Spring 2009	3695
Summer 2009	1726
Fall 2009	4031
Spring 2010	3685
Summer 2010	1752
*Fall 2010	4327
Spring 2011	3484
Summer 2011	1622
*Fall 2011	4624
Spring 2012	3359
Summer 2012	2038
*Fall 2012	4763
Spring 2013	3228

* Fall 2010 includes 504 TFA Summer Institute participants
* Fall 2011 includes 896 TFA Summer Institute participants
* Summer 2012 includes 414 TFA Summer Institute participants
* Fall 2012 includes 1141TFA Summer Institute participants

*Graduation Applications Processed			
Academic Year	**December**	**May**	**TOTAL**
2007/2008	387	466	853
2008/2009	402	484	886
2009/2010	349	424	773

2010/2011	398	495	893
2011/2012	388	392	780
2012/2013	374	422	796

*Application complete and degree conferred

Veterans Administration Enrollment Certifications Processed	
Academic Year	TOTAL
2005/2006	188
2006/2007	172
2007/2008	166
2008/2009	182
2009/2010	218
2010/2011	212
2011/2012	201
2012/2013	197

Section V.b
Staff (Accomplishments)
Narrative

Becky Finley, Associate Registrar/Coordinator of Commencement:
- Member of MACRAO
- Member of SACRAO
- Member of AACRAO
- Attended SACRAO, San Antonio, TX
- Assists with NCAA Compliance
- Coordinates Commencement
- Assisted with Workflow Development for 6 processes
- Veteran's Affairs Administrators of Mississippi Conference in Meridian, MS on October 19, 2012

Lauren Nichols, Articulation Speacialist/Asst Coordinator of Commencement:
- Member of MACRAO
- MACRAO retreat at Lake Tiak-O'khara Resort from April 8-9 2013.
- Veteran's Affairs Administrators of Mississippi Conference in Meridian, MS on October 19, 2012
- AdAstra Committee until October 2012
- Continuous updating of articulation processes in Banner
- Currently pursuing a Master of Business Administration from Delta State University

Rhonda Mitchell, Senior Secretary, Office of the Registrar & Director of Institutional Research & Planning:
- AdAstra Committee October 2012-present
- MACRAO retreat at Lake Tiak-O'khara Resort from April 8-9 2013.
- Assisted in refilling all the files in the back for easier access
- Assisted in reorganizing graduation efforts
- Currently pursuing a Master of Business Administration from Delta State University

Marcia Lishman, Senior Clerk, Office of the Registrar:
- Helped transition to electronic receipt of transcripts
- Reorganized the student folders in the file room making the individual folder easier to locate
- On the committee to simplify the TFA process from application to transcripts
- Attempted to locate the graduates who have a diploma still in the Registrar's Office as far back as the 1970's

Section V.c
Administrators (accomplishments)
Narrative

Education and Training
- Education Doctorate Program in Professional Studies, Delta State University (Passed Dissertation Proposal Defense May 2013)
- Updated certification from National Institute for Health on Human Research
- HR Manager's Training
- Student Learning Outcomes Training Certificate
- IPEDS Module I & II Training

Accomplishments
- Promoted to Registrar and Director of Institutional Research and Planning (July 1, 2012)
- Pin awarded for SAIR Mentor Program September 2012
- 5 Year Delta State University Year of Service Certificate
- AIR Professional File Peer Reviewer 2013 Annual Publication

Volunteer/Service
- Volunteered for various activities on campus including State of University Address, Staff Council Development Day, Italian Festival, Stuff the Bus Food Drive, Staff Council Organizer for Hattiesburg Tornado Relief Efforts and Moore, Oklahoma Relief Efforts

Memberships/Organizations
- IPEDS Keyholder
- State Longitudinal Data System Council
- Instructor for BIS 310: Interdisciplinary Research and Applications
- Mississippi Association for Institutional Research (MAIR) (Member)
- Mississippi Association for Institutional Research (MAIR) (Vice President 2012-2013)
- Mississippi Association for Institutional Research (MAIR) (Conference Organizer 2012-2013)
- Association of Institutional Research (AIR) (Member)
- Southern Association of Institutional Research (SAIR) (Member)
- Southern Association of Institutional Research (SAIR)—2012 (Presenter)
- Council of Institutional Research Officers (CIRO) (Member)
- Staff Council Representative (Member)
- Delta State University -Staff Council Executive Committee (Secretary 2009-2010) (Chair Elect 2010-11) (Chair 2011-12) (Past-Chair 2012-13)
- Delta State University -Staff Council Staff Development Committee & Incentives and Recognition Committee (Member)
- Pi Gamma Mu Social Science Honor Society (Member)

- Pi Sigma Alpha Political Science Honor Society (Member)
- Association for Politics and the Life Sciences (APLS) (Member)
- Delta State University Website Enhancement Committee (Member)
- Delta State University Alumni Association (Member)
- Arkansas State University Alumni Association (Member)
- Southern Association for College Registrar and Admission Officers
- Mississippi Banner User Group (Member)
- Banner Power User Group (Member)
- Mississippi Association for College Registrar and Admission Officers
- Compliance Academic Certification Officer
- AdAstra Committee
- National Student Clearinghouse Enrollment and Degree Submission Officer

Eliminate the Paper Chase with Workflow

Presented by:

Suzanne Simpson, Delta State University

Dr. Edwin Craft, Delta State University

Beverly Fratesi, Ellucian

April 9, 2013

Session ID 2969

Session Rules of Etiquette

- Please turn off your cell phone/pager

- If you must leave the session early, please do so as discreetly as possible

- Please avoid side conversation during the session

Thank you for your cooperation!

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Introduction

- Located in Cleveland, Mississippi
- Heart of the Mississippi Delta
- Carnegie II Regional Institution
- 4,700 Enrollment
- 1,100 Residential Students
- 71% of Students on Financial Aid
- 510 employees

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Introduction

In the summer of 2012, Delta State University began the process of automating several manual process in the Registrar's office utilizing Workflow. In this session you will learn about the process DSU went through to improve efficiency, consistency and accuracy for many of the Registrar's most critical processes.

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Agenda Slide

- What is workflow
- Identify the processes to improve
- Map the existing process
- Define the new process
- Lessons learned

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Graduation Application Notification Workflows

Graduation Application Flowcharts (Process Overviews)
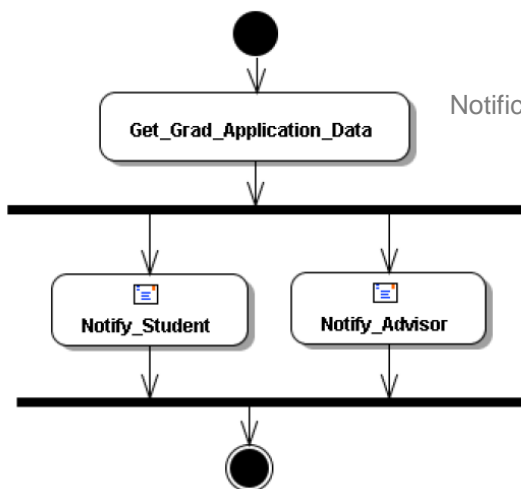
Notifications/Workflow Activities for Submitted Graduation Application

Notifications for Graduation Application Decisions
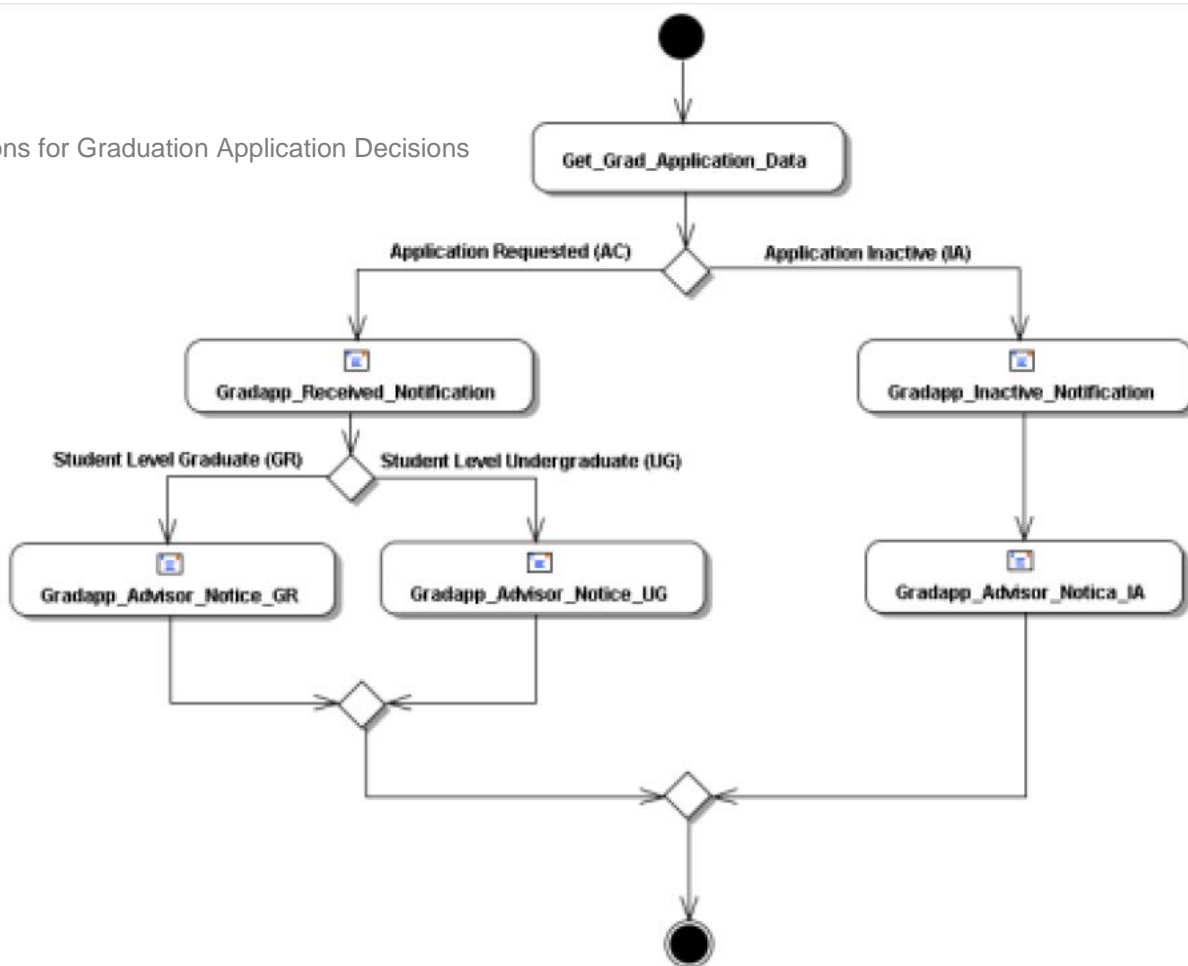
Notifications/Workflow Activities for Submitted Graduation Application*

1) Student or Registrar Office enters Graduation Application into Banner (through Self Service or INB forms).

2) A Graduation Application record will trigger an email notification to the student and their advisor(s) saying "graduation application has been submitted for X date and further notifications will be sent during processing."

Notifications for Graduation Application Decisions

1) If the Graduation Application is approved (graduation status entered in SHADEGR), by the Registrar's Office, an email notification will be sent to both the student and their advisor(s) letting them know "upon successful completion of the current term, they will be approved to Graduate."

2) If the Graduation Application is not approved (graduation status entered in SHADEGR), by the Registrar's Office a notification will go to the student and advisor(s) letting them know that "the student will not meet graduation requirements and will need to complete another Graduation Application in the future."

3) *If the student requests the Graduation Application be deactivated the student and their advisor(s) will get a notification saying "the application has been deactivated and they can contact the Registrar Office to re-activate the application."

Workflow Extras (if needed)

1) If you need to SEARCH for completed workflows, go to Workflow Status Search Link, under Home Menu.

2) Enter Search Criteria that is known ('%' = WILDCARD)

3) Click "SEARCH" button.

1) If you need to UPDATE your **Proxy Information**, go to the User Information Option Link, under User Profile Menu.

What is workflow

What is workflow

Workflow:

"…the <u>automation</u> of a <u>business process</u>, in whole or part, during which <u>documents</u>, <u>information</u>, or <u>tasks</u> are <u>passed</u> from one <u>participant</u> to another for <u>action</u>, according to a set of procedural <u>rules</u>."

the Workflow Management Coalition™

What is workflow

- Graphically depicts and automates a business process
- Facilitates the timely movement of work between role players
- Provides seamless integration to Banner
- Provides ability to launch desktop or web applications
- Automates the flow of work throughout your entire organization
- Includes effective dating of work

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What is workflow

- Why use workflows?
  - Process efficiency
  - Process consistency
  - Expanded communication
  - Spans the entire institution
  - Includes effective dating of work
  - Accommodates confidential work
  - Provides a "Proxy"
  - Provides a clear visibility of work

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Identify the Process to Improve

Identify the Processes to Improve

- Select a project with a BIG impact
- Crosses multiple departments
- Be accepting of change
- Accept the fact that the old process is
  - Broken
  - Inefficient
  - Needs change

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Identify the Processes to Improve

- Improve a paper based or manual process
- Notification or approval based
- Must begin with an event
- Must have an end
- Pass information or work from one role to another
- Make life easier!

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Identify the Processes to Improve

- ## Processes Identified
  - Student withdrawal
  - Course add/drop
  - Course substitution/degree modification
  - Grade change

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Map the existing process

15

15
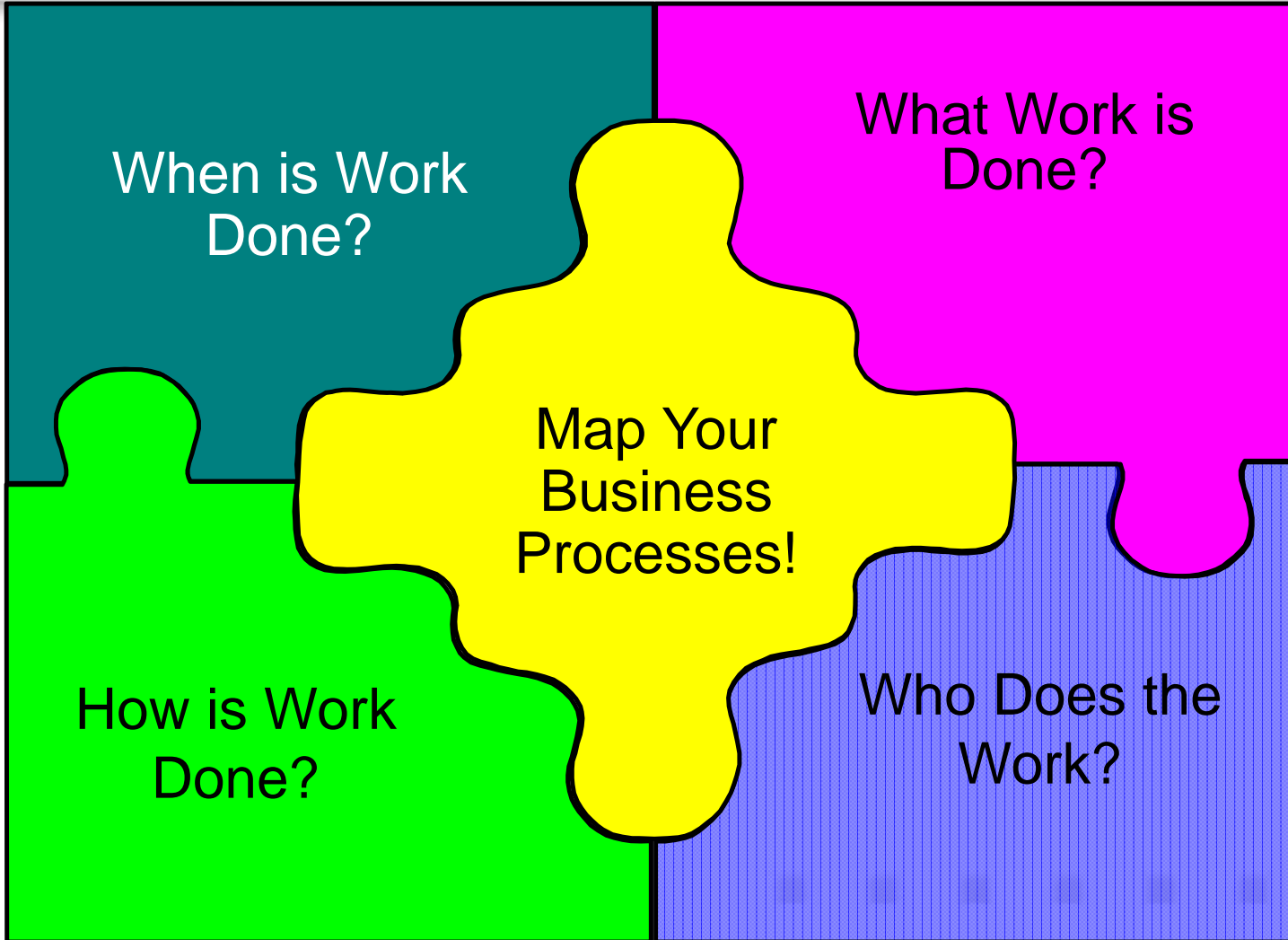
Map the Existing Process

- Who
  - An individual
  - A group
- What
  - Manual Activity
  - Communication
  - Approval
  - Custom

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Map the Existing Process

- ## When

  – Properly record the order of each activity

  – Don't overlook any steps, every current step is important

- ## Why

  – Don't get bogged down with the why, that will come later

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Map the Existing Process

- ## Project Team
  - Registrar's office
  - Graduate Studies
  - Academic Affairs
  - Admissions
  - Financial Aid
  - Finance and Administration
  - Office of Information Technology

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Map the Existing Process

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Map the Existing Process
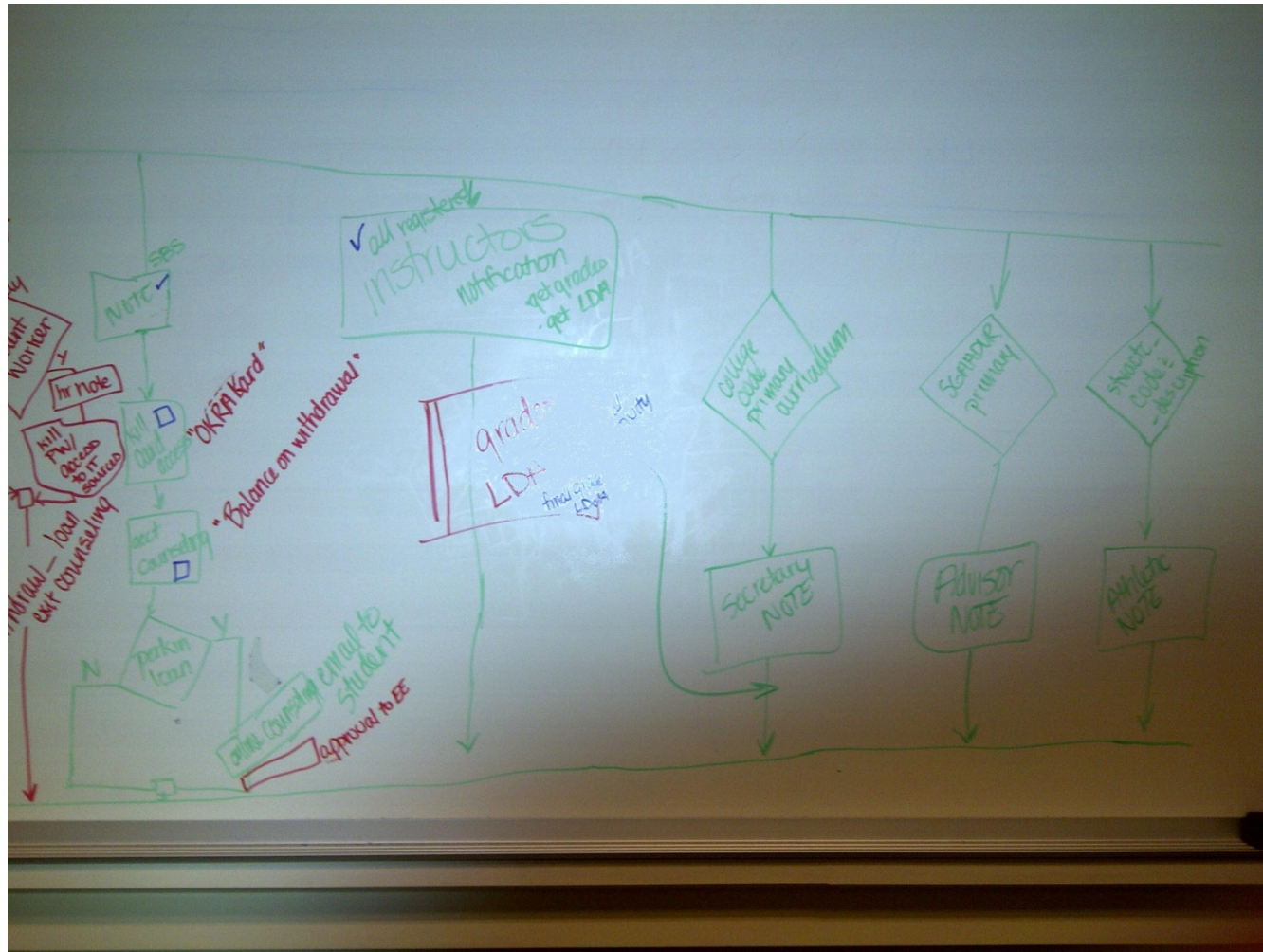
Define the New Process

Define the New Process

- **Include everyone**
- **Set clear goals**
- **Now ask the question-Why**
  - Is the step in the process needed
  - Are the approval required or informational
  - Should the process be changed
- **What new features need to be included**

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Define the New Process

- Types of actions
  - Approval
  - Communication/notification
  - Parallel activities
  - Form in Banner
  - Manual activity

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Define the New Process

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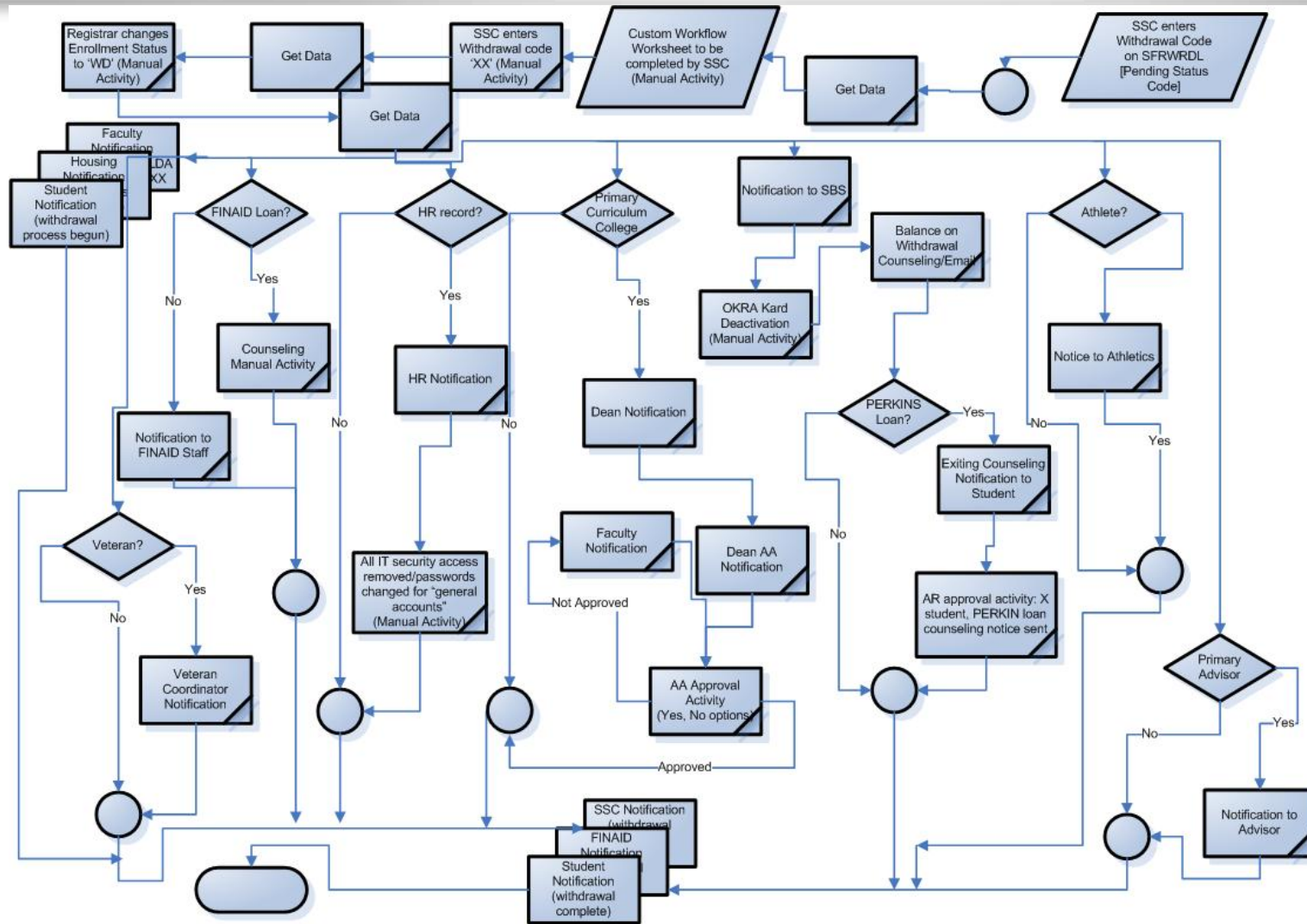
Define the New Process

Communication

Student Business Services:
TO: Student Business Services Role
FROM: NO REPLY
SUBJ: Student Withdrawal

"This email is to inform you of the official withdrawal of ____(Student Name, Student ID)_____.

You are being notified because this student's account contained one of the following charges: payments, tuition, dorm charges, meal plan, Perkins Loan, and/or Title IV financial aid.

It is the responsibility of your office to finalize the student's account charges and notify the student."

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Define the New Process

Communication

Instructor, Advisor:
TO: <Instructor Email> <Advisor Email>
FROM: NO REPLY
SUBJ: Student Withdrawal

"_____(Student name)_____ , _____(Student ID)_____ , _____(major)_____ has officially initiated the withdrawal process with the Student Success Center.

CRN	SUBJ	Course Number	Instructor

Please post Last Date of Attendance* OR participation and final grade to the listed course(s) in self service.

*For purposes of financial aid and enrollment, a student will be considered to be in attendance in an online class when the individual 1) participates in online discussions about academic matters; OR 2) initiates contact with faculty to ask questions about subject studies; OR 3) completes assignments OR 4) take tests. Logging into an online course without active participation does not constitute attendance."

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Define the New Process

Communication

Student Notification #1:
TO: <Student Email>
FROM: NO REPLY
SUBJ: Student Withdrawal

<DELTA STATE LOGO>

"Dear _____(student Name)_____,
Your request for withdrawal from Delta State University is in process. You will receive an email notification once your withdrawal has been finalized.

If you received Student Loans or Financial Aid from DSU, you will be contacted by the Student Business Services and/or Financial Aid Office. Withdrawal may also impact your re-admission and or funding eligibility in the future.

If you have any questions, please contact the Student Success Center, Union 308, 662-846-4574 at studentsuccess@deltastate.edu"

<Christy, SSC Signature>

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Define the New Process

Communication

Student Notification #2:

TO: <Student Email>

FROM: NO REPLY

SUBJ: Student Withdrawal FINAL

<DELTA STATE LOGO>

"Your request for withdrawal from DSU has been completed. You are officially
withdrawn from DSU.

If you decide to return to DSU in the future, please contact DSU Admissions."

<Suzanne, Registrar Signature>

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Define the New Process

More Communication

- Housing
- Deans
- Student Success Center
- Athletics
- Perkins Loan Staff
- Financial Aid Staff

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Lessons Learned

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Lessons Learned

- Define the people involved
- Clearly define the goal
- Set expectations and outcomes
- Keep the personalities out of the room
- No hoarding of information or business processes
- Don't try to fix the process first

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Lessons Learned

- Separate the planning session for:
  - Old process mapping
  - New process mapping
- Don't rush the process
- Don't re-create the paper

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Value Gained

- Improved student satisfaction
- Reduced workflow
- Faster processing time
- Less mistakes
- More communication
- Time stamped paper trail
- No lost paperwork
- Increased data for reason codes

Summary

- Engage the right resources
- Map out the old process
- Examine the old process
- Determine if approvals are required
- Brainstorm new ideas in the new process
- Map out the new process and review

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Questions & Answers

Questions?

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Thank You!

Suzanne Simpson, ssimpson@deltastate.edu
Dr. Edwin Craft, ecraft@deltastate.edu
Beverly Fratesi, beverly.fratesi@ellucian.com

Please complete the online session evaluation form
Session ID 2969

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Workflow Specification Template

Student Course Add

Delta State University

Prepared by:
Mary DeGraw
Ellucian Systems Consultant
Version 1.0
Last Modified Date: June 3, 2016

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Table of Contents

Document Revision History

Revision	Date	Author	Changes
Original	11/27/2012	Mary DeGraw	Original

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Deliverable Acceptance

Project	Student Course Drop Workflow		
Date	11/27/2012		
Project Manager	*Edwin Craft*	Project Sponsor	*Dr. Ann Lotven*

User Approvals

Title	Name	Date
Lead	*Suzanne Simpson*	
	Becky Finley	
Functional Consultant	*Mary DeGraw*	
Admin/Computing Director	*Edwin Craft*	
Vice President	*Dr. Ann Lotven*	

Deliverable Information

ID	Deliverable Description	Due Date	Date Delivered	Accepted/ Rejected By
	Functional Review		11/27/2012	
	Final Sign-Off on Functional Specification		11/27/2012	
	Technical Review			
	Turn over for Acceptance Testing and Refinement			
	Zip and Email all Documents and Code to CIO/PM with Subject Line " Final Deliverables for <<project name>>"			
	Project Sign-Off			

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Overview

Purpose
This workflow is intended as a pilot project for Delta State University to begin using WorkFlow. It is a multi-part process to address all the steps that are required to accomplish adding a course after the "open drop/add period".

Narrative Summary
The project will consist of one workflow. One trigger, from Student Self Service, will activate the workflow to gather necessary steps to notify the course instructor, college dean, and registrar that a student would like to add a course.

Scope
This one workflow will have multiple automated and interactive activities. ellucian will develop those elements and deliver them for testing. Any further enhancements or maintenance are the responsibility of Delta State University or their representatives.

Functions and Features

- A trigger from Student Self Service.

- Instructor and College Dean Administrative Assistant Notifications are sent.

- College Dean Administrative Assistant gets/completes Approval Activity for Request.

- If Approved by Dean AA: College Dean gets/completed Approval Activity for Request.

- If Denied by Dean AA: Notifications go out too all persons.

- If Approved by College Dean: Registrar updates SFAREGS & Notifications are sent to all persons.

- If Denied by College Dean: Notifications go out to all persons.

Reference Documents
The following documents/resources should be used in conjunction with this document

- Trigger.sql – PL/SQL source code for the trigger

- Workflow.file – XML WorkFlow save file

Functional

This workflow will respond to a student request to add a course after the initial drop/add period each term.

Flowchart:
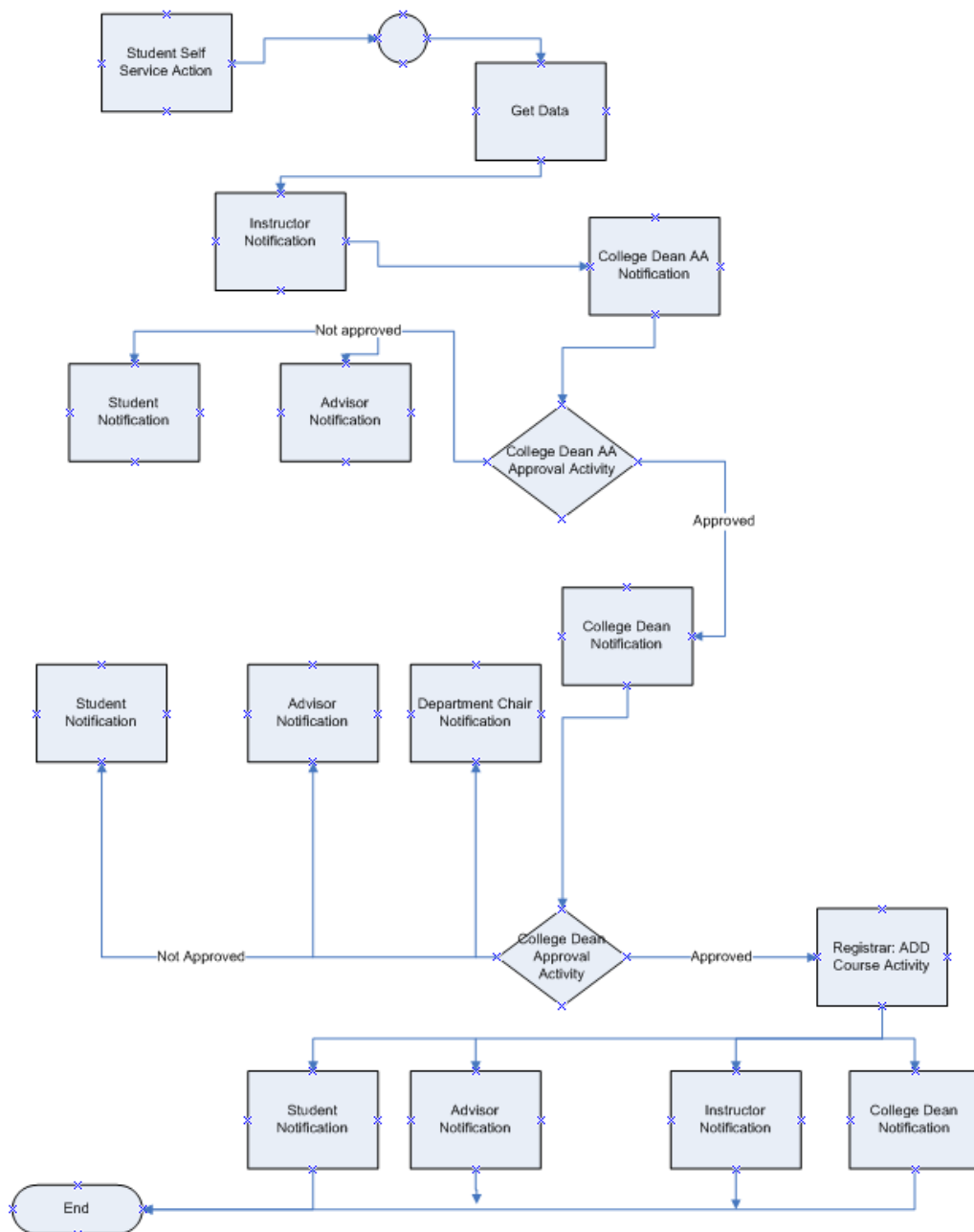
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Assumptions

Overall
The following are the assumptions made for the WorkFlow:

- The student, instructors, College Deans, and College Dean Administrative Assistant has a valid email addresses.

- Course Tuition & Fees are set up, in banner, as desired.

Technical
The following are the Technical assumptions made for the WorkFlow:

- Self Service Student Webpage is developed and correctly associated with necessary tables.

- WorkFlow is installed and correctly associated with the email server and database.

User Interfaces
A Student Self Service Page is required for this workflow. (Attached document "CourseADD_GUI")

Technical

Database Objects
- Z_WFT_TRIGGER_NAME – Trigger on <Banner table name>

- Z_WF_PACKAGENAME – Package of workflow related procedures

    o P_UPDATE_TABLE – Procedure to update database values

    o P_GET_REQUIRED_INFO – Procedure to collect information from database

WorkFlow Objects
- BANNER_WF_EVENT_NAME – Event Queue (GTVEQNM)

- WF_PG_NAME – Event parameter group (GTVEQPG/GOREQNM)

- Event parameters (GTVEQPM/GOREQPG)

> EVENTNAME–"BANNER_WF_EVENT_NAME"
> PRODUCTTYPE-"Banner"
> WORKFLOWSPECIFICNAME – "[Student Name] has done something in term [TERM]"
> PIDM – Student PIDM TERM – Academic term of withdrawal

- WF_BUSINESS_EVENT_NAME – WorkFlow Business Event

- WF_BUSINESS_COMPONENT_TO_UPDATE_TABLE – Business Component – Stored Procedure

- WF_BUSINESS_COMPONENT_TOGET_INFO – Business Component – Stored Procedure

- WF_Business_Process_Name – Business Process

- WF_Model_Name : version – Workflow Model

    o Component parameters

    PIDM–Student PIDM

    TERM–Academic term of withdrawal

    ID – Student ID

    FULLNAME – Student name (First Last)

    ADDR_STREET1 – Address street line 1

    ADDR_STREET2 – Address street line 2

    ADDR_STREET3 – Address street line 3

    ADDR_CITY – Address city

    ADDR_STATE – Address state code

    ADDR_ZIP – Address zip code

    PHONE – Phone number

    STUD_LEVEL – Student level description

    STUD_PROGRAM – Student academic program

    GRAD_TERM – Anticipated graduation term

    STUD_STATUS – Student status

    BLDG_ROOM – Residence building and room

    HOUSING_FLAG – Student in housing? Y/N

    o Activities

        ▪ Manual Activities

        Include example template of manual text

        ▪ Email Activities

        Include example template of email

        ▪ Banner Forms (Interactive)

        Include Business component name and in/out parameters

        ▪ Web Links

Include URL

- Approval Activities

  Include example template of approval

- Custom Activities

  Include example template of custom form

- Automated Activities (Stored Procedure)

  Include Business component name and in/out parameters

- Automated Activities (SQL Query)

  Include Business component name and in/out parameters

o Decision Points

- Guard conditions

Database tables & APIs used

SFBETRM – Student registration table

SFRWDRL – Student withdrawal table

SGBSTDN – Student base table

SHRTTCM – Transcript Comments by Term Repeating Table

Installation

Overall Assumptions

- Database packages will be compiled in the BANINST1 schema.

- Database triggers will be compiled in the schema of the triggering table.

Required Files

List any required files or packages that are required for this project here.

Z_WF_PACKAGENAME0.sql, Z_WF_PACKAGENAME0.sql	SQL – Creates support package of procedures used by the workflow.
Z_WFT_TRIGGER_NAME.sql	SQL – Trigger on database table to insert workflow event into Banner queue
BANNER_WF_EVENT_NAME.sql	SQL – Script to insert all required rows on Banner event tables
WF_WORKFLOW_MODEL.xml	XML –Installation file extracted from WorkFlow and parsed to include only

	required workflow elements using baseline workflow extract scripts.

Go Live Integration and Data Migration
Examples below:

To prepare for the setup of this program in a production environment:

-

Execution
Examples below:

The workflow will begin for each instance of Banner events trigger by the specified database change.

- Example field on table is changed and fires the trigger, calling the Banner event which begins an instance of the workflow.

Testing, Trials and Upgrades
Examples below:

The construction of the process allows easy testing of all functionality.

- Change the triggering database field.
  - Confirm that the trigger fired
  - Confirm that the Banner event was inserted into the queue.
  - Confirm that the Banner event was process by the workflow engine.
  - Confirm that the workflow external event was processed
  - Confirm that the workflow was instantiated
  - Confirm that each step of the workflow was processed.
  - Confirm that the workflow completes successfully.

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Workflow Specification Template

Degree Modification Request Workflow

Delta State University

Prepared by:
Mary DeGraw
Ellucian Systems Consultant
Version 1.0
Last Modified Date: June 3, 2016

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Confidential Business Information

Table of Contents

Document Revision History

Revision	Date	Author	Changes
Original	11/27/2012	Mary DeGraw	Original

Deliverable Acceptance

Project	Workflow – Degree Modification Request		
Date	11/27/2012		
Project Manager	*Edwin Craft*	**Project Sponsor**	*Edwin Craft*

User Approvals

Title	Name	Date
Lead	*Suzanne Smith*	
	Becky Finley	
Functional Consultant	*Mary DeGraw*	
Admin/Computing Director	*Edwin Craft*	
Vice President	**Dr. Ann Lotven**	

Deliverable Information

ID	Deliverable Description	Due Date	Date Delivered	Accepted/ Rejected By
	Functional Review		11/27/2012	
	Final Sign-Off on Functional Specification		11/27/2012	
	Technical Review			
	Turn over for Acceptance Testing and Refinement			
	Zip and Email all Documents and Code to CIO/PM with Subject Line " Final Deliverables for <<project name>>"			
	Project Sign-Off			

Overview

Purpose

This workflow is intended as a pilot project for Delta State University to begin using WorkFlow. It is a multi-part process to address all the steps that are required to accomplish the goal.

Narrative Summary

The project will consist of a trigger on an Advisor Self Service page activity. This activates the event which instantiates the workflow process which collects necessary information and completes the steps to address all the required issues.

Scope

This is a complex workflow with multiple automated and interactive activities. ellucian will develop those elements and deliver them for testing. Any further enhancements or maintenance are the responsibility of Delta State University or their representatives.

Functions and Features

- A trigger on an Advisor Self Service Page.

- A Notification and Approval Activity will go to Department Chair.

- If Approved by Department Chair: College Dean Administrative Assistant gets/completes Approval Activity for Request.

- If Denied by Department Chair: Notifications go out to all persons.

- If Approved by College Dean: Registrar updates Degree & Notifications are sent to all persons.

- If Denied by College Dean: Notifications go out to all persons.

Reference Documents

The following documents/resources should be used in conjunction with this document

- Trigger.sql – PL/SQL source code for the trigger

- Workflow.file – XML WorkFlow save file

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Functional

This workflow will respond to a student course substitution/degree modification request and will proceed through the appropriate steps.

Flowchart:

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Assumptions

Overall
The following are the assumptions made for the WorkFlow:

- The student, advisor, College Dean, and Department Chair have valid email addresses.

Technical
The following are the Technical assumptions made for the WorkFlow:

- Self Service Advisor Webpage is developed and correctly associated with necessary tables.

- WorkFlow is installed and correctly associated with the email server and database.

User Interfaces
A new Advisor Self Service Page will need to be developed to trigger this workflow, with current workflow access.

Technical

Database Objects
- Z_WFT_TRIGGER_NAME – Trigger on <Banner table name>

- Z_WF_PACKAGENAME – Package of workflow related procedures

    o P_UPDATE_TABLE – Procedure to update database values

    o P_GET_REQUIRED_INFO – Procedure to collect information from database

WorkFlow Objects
- BANNER_WF_EVENT_NAME – Event Queue (GTVEQNM)

- WF_PG_NAME – Event parameter group (GTVEQPG/GOREQNM)

- Event parameters (GTVEQPM/GOREQPG)

> EVENTNAME–"BANNER_WF_EVENT_NAME"
> PRODUCTTYPE-"Banner"
> WORKFLOWSPECIFICNAME – "[Student Name] has done something in term [TERM]"
> PIDM – Student PIDM TERM – Academic term of withdrawal

- WF_BUSINESS_EVENT_NAME – WorkFlow Business Event

- WF_BUSINESS_COMPONENT_TO_UPDATE_TABLE – Business Component – Stored Procedure

- WF_BUSINESS_COMPONENT_TOGET_INFO – Business Component – Stored Procedure

- WF_Business_Process_Name – Business Process

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- WF_Model_Name : version – Workflow Model

    o <u>Component parameters</u>

    PIDM–Student PIDM

    TERM–Academic term of withdrawal

    ID – Student ID

    FULLNAME – Student name (First Last)

    ADDR_STREET1 – Address street line 1

    ADDR_STREET2 – Address street line 2

    ADDR_STREET3 – Address street line 3

    ADDR_CITY – Address city

    ADDR_STATE – Address state code

    ADDR_ZIP – Address zip code

    PHONE – Phone number

    STUD_LEVEL – Student level description

    STUD_PROGRAM – Student academic program

    GRAD_TERM – Anticipated graduation term

    STUD_STATUS – Student status

    BLDG_ROOM – Residence building and room

    HOUSING_FLAG – Student in housing? Y/N

    o <u>Activities</u>

    ▪ <u>Manual Activities</u>

    Include example template of manual text

    ▪ <u>Email Activities</u>

    Include example template of email

    ▪ <u>Banner Forms (Interactive)</u>

    Include Business component name and in/out parameters

    ▪ <u>Web Links</u>

    Include URL

- Approval Activities

  Include example template of approval

- Custom Activities

  Include example template of custom form

- Automated Activities (Stored Procedure)

  Include Business component name and in/out parameters

- Automated Activities (SQL Query)

  Include Business component name and in/out parameters

  o Decision Points

  - Guard conditions

Database tables & APIs used

SFBETRM – Student registration table

SFRWDRL – Student withdrawal table

SGBSTDN – Student base table

SHRTTCM – Transcript Comments by Term Repeating Table

Installation

Overall Assumptions

- Database packages will be compiled in the BANINST1 schema.

- Database triggers will be compiled in the schema of the triggering table.

Required Files

List any required files or packages that are required for this project here.

Z_WF_PACKAGENAME0.sql, Z_WF_PACKAGENAME0.sql	SQL – Creates support package of procedures used by the workflow.
Z_WFT_TRIGGER_NAME.sql	SQL – Trigger on database table to insert workflow event into Banner queue
BANNER_WF_EVENT_NAME.sql	SQL – Script to insert all required rows on Banner event tables
WF_WORKFLOW_MODEL.xml	XML –Installation file extracted from WorkFlow and parsed to include only required workflow elements using baseline

	workflow extract scripts.

Go Live Integration and Data Migration
Examples below:

To prepare for the setup of this program in a production environment:

-

Execution
Examples below:

The workflow will begin for each instance of Banner events trigger by the specified database change.

- Example field on table is changed and fires the trigger, calling the Banner event which begins an instance of the workflow.

Testing, Trials and Upgrades
Examples below:

The construction of the process allows easy testing of all functionality.

- Change the triggering database field.
    - o Confirm that the trigger fired.
    - o Confirm that the Banner event was inserted into the queue.
    - o Confirm that the Banner event was process by the workflow engine.
    - o Confirm that the workflow external event was processed.
    - o Confirm that the workflow was instantiated.
    - o Confirm that each step of the workflow was processed.
    - o Confirm that the workflow completes successfully.

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Workflow Specification Template

Degree Modification Request Workflow

Delta State University

Prepared by:
Mary DeGraw
Ellucian Systems Consultant
Version 1.0
Last Modified Date: June 3, 2016

Table of Contents

Document Revision History

Revision	Date	Author	Changes
Original	11/27/2012	Mary DeGraw	Original

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Deliverable Acceptance

Project	Workflow – Degree Modification Request		
Date	11/27/2012		
Project Manager	*Edwin Craft*	**Project Sponsor**	*Edwin Craft*

User Approvals

Title	Name	Date
Lead	*Suzanne Smith*	
	Becky Finley	
Functional Consultant	*Mary DeGraw*	
Admin/Computing Director	*Edwin Craft*	
Vice President	**Dr. Ann Lotven**	

Deliverable Information

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	Final Sign-Off on Functional Specification		11/27/2012	
	Technical Review			
	Turn over for Acceptance Testing and Refinement			
	Zip and Email all Documents and Code to CIO/PM with Subject Line " Final Deliverables for <<project name>>"			
	Project Sign-Off			

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Overview

Purpose
This workflow is intended as a pilot project for Delta State University to begin using WorkFlow. It is a multi-part process to address all the steps that are required to accomplish the goal.

Narrative Summary
The project will consist of a trigger on an Advisor Self Service page activity. This activates the event which instantiates the workflow process which collects necessary information and completes the steps to address all the required issues.

Scope
This is a complex workflow with multiple automated and interactive activities. ellucian will develop those elements and deliver them for testing. Any further enhancements or maintenance are the responsibility of Delta State University or their representatives.

Functions and Features

- A trigger on an Advisor Self Service Page.

- A Notification and Approval Activity will go to Department Chair.

- If Approved by Department Chair: College Dean Administrative Assistant gets/completes Approval Activity for Request.

- If Denied by Department Chair: Notifications go out to all persons.

- If Approved by College Dean: Registrar updates Degree & Notifications are sent to all persons.

- If Denied by College Dean: Notifications go out to all persons.
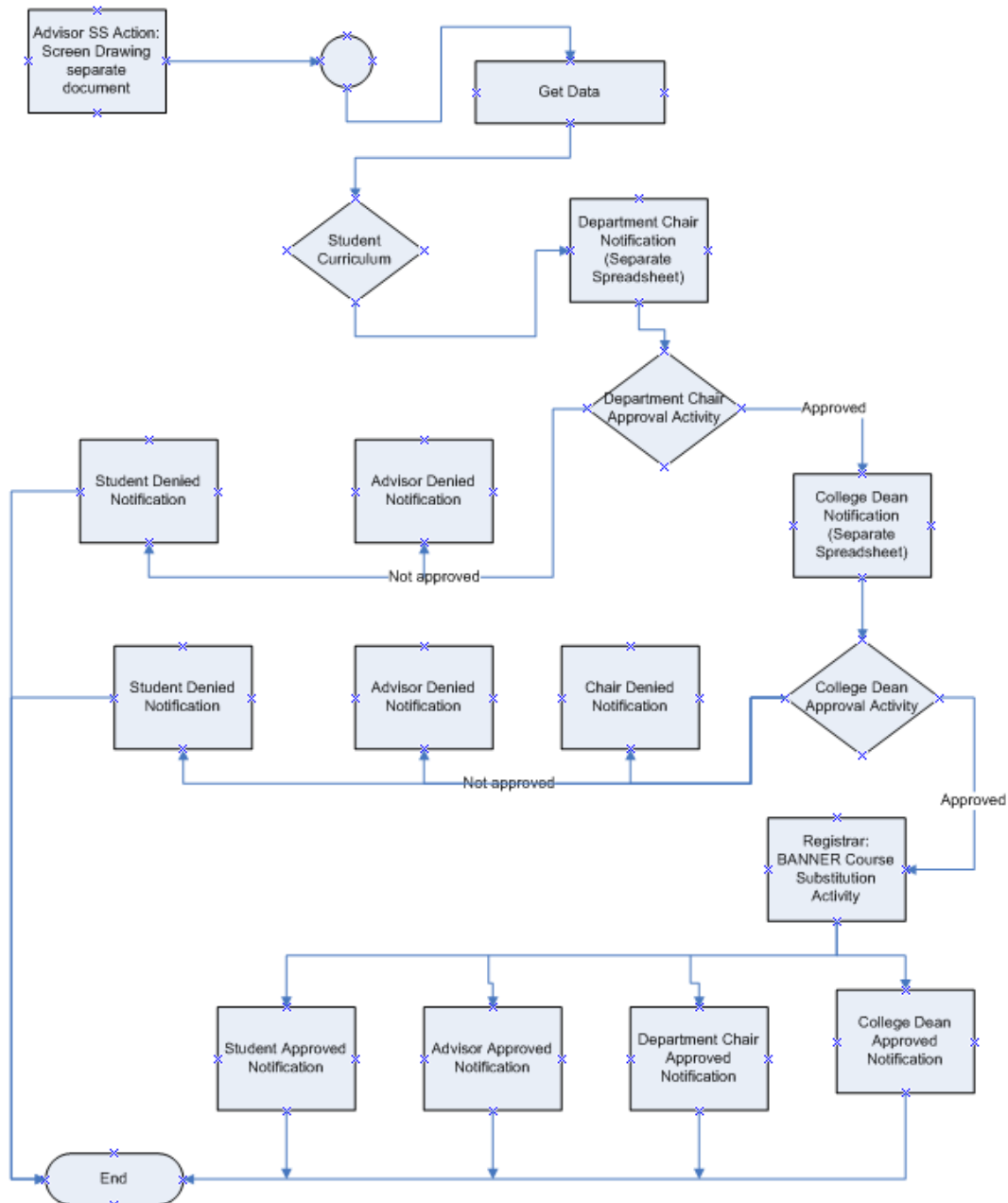
Reference Documents
The following documents/resources should be used in conjunction with this document

- Trigger.sql – PL/SQL source code for the trigger

- Workflow.file – XML WorkFlow save file

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Functional

This workflow will respond to a student course substitution/degree modification request and will proceed through the appropriate steps.

Flowchart:

![ellucian™]

Assumptions

Overall
The following are the assumptions made for the WorkFlow:

- The student, advisor, College Dean, and Department Chair have valid email addresses.

Technical
The following are the Technical assumptions made for the WorkFlow:

- Self Service Advisor Webpage is developed and correctly associated with necessary tables.

- WorkFlow is installed and correctly associated with the email server and database.

User Interfaces
A new Advisor Self Service Page will need to be developed to trigger this workflow, with current workflow access.

Technical

Database Objects
- Z_WFT_TRIGGER_NAME – Trigger on <Banner table name>

- Z_WF_PACKAGENAME – Package of workflow related procedures

  o P_UPDATE_TABLE – Procedure to update database values

  o P_GET_REQUIRED_INFO – Procedure to collect information from database

WorkFlow Objects
- BANNER_WF_EVENT_NAME – Event Queue (GTVEQNM)

- WF_PG_NAME – Event parameter group (GTVEQPG/GOREQNM)

- Event parameters (GTVEQPM/GOREQPG)

  > EVENTNAME–"BANNER_WF_EVENT_NAME"
  > PRODUCTTYPE-"Banner"
  > WORKFLOWSPECIFICNAME – "[Student Name] has done something in term [TERM]"
  > PIDM – Student PIDM TERM – Academic term of withdrawal

- WF_BUSINESS_EVENT_NAME – WorkFlow Business Event

- WF_BUSINESS_COMPONENT_TO_UPDATE_TABLE – Business Component – Stored Procedure

- WF_BUSINESS_COMPONENT_TOGET_INFO – Business Component – Stored Procedure

- WF_Business_Process_Name – Business Process

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- WF_Model_Name : version – Workflow Model

  o <u>Component parameters</u>

    PIDM–Student PIDM

    TERM–Academic term of withdrawal

    ID – Student ID

    FULLNAME – Student name (First Last)

    ADDR_STREET1 – Address street line 1

    ADDR_STREET2 – Address street line 2

    ADDR_STREET3 – Address street line 3

    ADDR_CITY – Address city

    ADDR_STATE – Address state code

    ADDR_ZIP – Address zip code

    PHONE – Phone number

    STUD_LEVEL – Student level description

    STUD_PROGRAM – Student academic program

    GRAD_TERM – Anticipated graduation term

    STUD_STATUS – Student status

    BLDG_ROOM – Residence building and room

    HOUSING_FLAG – Student in housing? Y/N

  o <u>Activities</u>

    ▪ <u>Manual Activities</u>

      Include example template of manual text

    ▪ <u>Email Activities</u>

      Include example template of email

    ▪ <u>Banner Forms (Interactive)</u>

      Include Business component name and in/out parameters

    ▪ <u>Web Links</u>

      Include URL

- Approval Activities

  Include example template of approval

- Custom Activities

  Include example template of custom form

- Automated Activities (Stored Procedure)

  Include Business component name and in/out parameters

- Automated Activities (SQL Query)

  Include Business component name and in/out parameters

- Decision Points

  - Guard conditions

Database tables & APIs used

SFBETRM – Student registration table

SFRWDRL – Student withdrawal table

SGBSTDN – Student base table

SHRTTCM – Transcript Comments by Term Repeating Table

Installation

Overall Assumptions

- Database packages will be compiled in the BANINST1 schema.

- Database triggers will be compiled in the schema of the triggering table.

Required Files

List any required files or packages that are required for this project here.

Z_WF_PACKAGENAME0.sql, Z_WF_PACKAGENAME0.sql	SQL – Creates support package of procedures used by the workflow.
Z_WFT_TRIGGER_NAME.sql	SQL – Trigger on database table to insert workflow event into Banner queue
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WF_WORKFLOW_MODEL.xml	XML –Installation file extracted from WorkFlow and parsed to include only required workflow elements using baseline

	workflow extract scripts.

Go Live Integration and Data Migration

Examples below:

To prepare for the setup of this program in a production environment:

-

Execution

Examples below:

The workflow will begin for each instance of Banner events trigger by the specified database change.

- Example field on table is changed and fires the trigger, calling the Banner event which begins an instance of the workflow.

Testing, Trials and Upgrades

Examples below:

The construction of the process allows easy testing of all functionality.

- Change the triggering database field.
  - Confirm that the trigger fired.
  - Confirm that the Banner event was inserted into the queue.
  - Confirm that the Banner event was process by the workflow engine.
  - Confirm that the workflow external event was processed.
  - Confirm that the workflow was instantiated.
  - Confirm that each step of the workflow was processed.
  - Confirm that the workflow completes successfully.

Workflow Specification Template

Grade Change Request Workflow Detail Description

Delta State University

Prepared by:
Mary DeGraw
Ellucian Systems Consultant
Version 1.0
Last Modified Date: June 3, 2016

Table of Contents

Document Revision History

Revision	Date	Author	Changes
Original	11/27/2012	Mary DeGraw	Original

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Deliverable Acceptance

Project	Workflow – Grade Change Request		
Date	11/27/2012		
Project Manager	*Edwin Craft*	Project Sponsor	*Edwin Craft*

User Approvals

Title	Name	Date
Lead	*Suzanne Smith*	
	Becky Finley	
Functional Consultant	*Mary DeGraw*	
Admin/Computing Director	*Edwin Craft*	
Vice President	**Dr. Ann Lotven**	

Deliverable Information

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	Technical Review			
	Turn over for Acceptance Testing and Refinement			
	Zip and Email all Documents and Code to CIO/PM with Subject Line " Final Deliverables for <<project name>>"			
	Project Sign-Off			

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Overview

Purpose

This workflow is intended as a pilot project for Delta State University to begin using WorkFlow. It is a multi-part process to address all the steps that are required to accomplish the goal.

Narrative Summary

The project will consist of a trigger from Faculty Self Service activity. This activates the event which instantiates the workflow process which collects necessary information and completes the steps to address all the required issues.

Scope

This is a complex workflow with multiple automated and interactive activities. ellucian will develop those elements and deliver them for testing. Any further enhancements or maintenance are the responsibility of Delta State University or their representatives.

Functions and Features

- A trigger on a Self Service Page Submission.

- A workflow notification and event will go to Department Chair.

- Approval from Chair: A workflow notification and event will go to College Dean.

- Denied from Chair: Notifications go to Student and Faculty.

- Approval from Dean: A workflow event will go to Registrar Office.

- Denied from Dean: Notifications go to Student, Faculty, and Chair.

- A workflow process with supporting database interfaces.

- All Approved: Notifications to go to all involved.
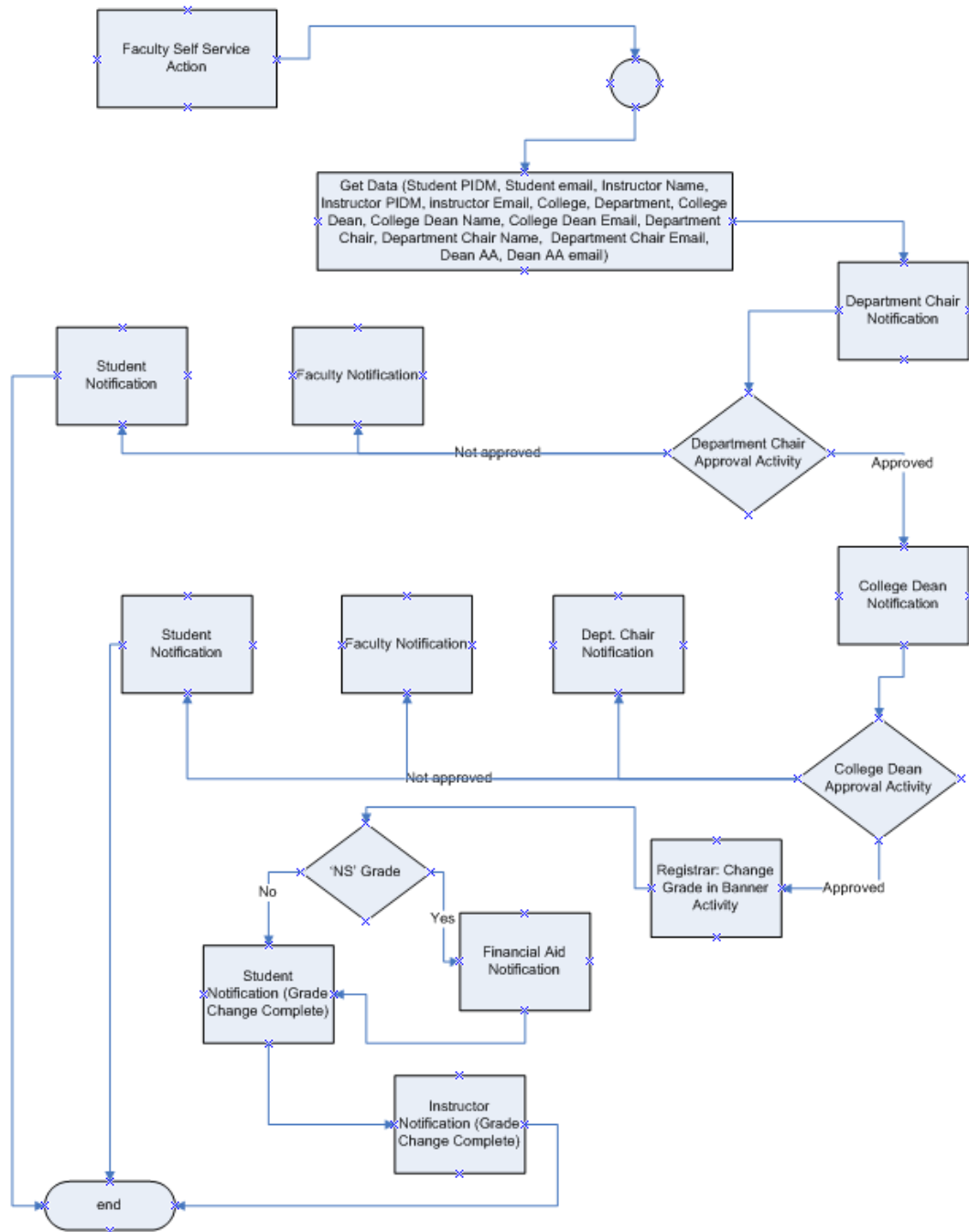
Reference Documents

The following documents/resources should be used in conjunction with this document

- Trigger.sql – PL/SQL source code for the trigger

- Workflow.file – XML WorkFlow save file

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Functional

This workflow will respond to a grade change request in Faculty Self Service and will proceed through the appropriate steps.

Flowchart:

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Assumptions

Overall
The following are the assumptions made for the WorkFlow:

- The student, instructor, College Dean, and Department Chair have valid email addresses.

- Grades are entered in Banner, prior to a change.

- Grades submitted are appropriate Grade types (Pass or Fail, versus standard letter).

- Terms are active on SOATERM.

Technical
The following are the Technical assumptions made for the WorkFlow:

- Self Service Faculty Webpage is developed and correctly associated with necessary tables.

- WorkFlow is installed and correctly associated with the email server and database.

User Interfaces
A new Faculty Self Service Page is required for this workflow, based on current access to Banner Workflow.

Technical

Database Objects
- Z_WFT_TRIGGER_NAME – Trigger on <Banner table name>

- Z_WF_PACKAGENAME – Package of workflow related procedures

  - P_UPDATE_TABLE – Procedure to update database values

  - P_GET_REQUIRED_INFO – Procedure to collect information from database

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- WF_Business_Process_Name – Business Process

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        PIDM–Student PIDM

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        PHONE – Phone number

        STUD_LEVEL – Student level description

        STUD_PROGRAM – Student academic program

        GRAD_TERM – Anticipated graduation term

        STUD_STATUS – Student status

        BLDG_ROOM – Residence building and room

        HOUSING_FLAG – Student in housing? Y/N

    o <u>Activities</u>

        ▪ <u>Manual Activities</u>

        Include example template of manual text

        ▪ <u>Email Activities</u>

        Include example template of email

        ▪ <u>Banner Forms (Interactive)</u>

Include Business component name and in/out parameters

- Web Links

  Include URL

- Approval Activities

  Include example template of approval

- Custom Activities

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- Automated Activities (SQL Query)

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Database tables & APIs used

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SHRTTCM – Transcript Comments by Term Repeating Table

Installation

Overall Assumptions

- Database packages will be compiled in the BANINST1 schema.

- Database triggers will be compiled in the schema of the triggering table.

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Go Live Integration and Data Migration
Examples below:

To prepare for the setup of this program in a production environment:

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Execution
Examples below:

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Testing, Trials and Upgrades
Examples below:

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- Change the triggering database field.
    - Confirm that the trigger fired.
    - Confirm that the Banner event was inserted into the queue.
    - Confirm that the Banner event was process by the workflow engine.
    - Confirm that the workflow external event was processed.
    - Confirm that the workflow was instantiated.
    - Confirm that each step of the workflow was processed.
    - Confirm that the workflow completes successfully.