# **College Connection Application Workflow - Getting Started**

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#### 1 Overview

The College Connection Application Workflow process is to assist the Admission and Records office to manage the demand for high school students' college connection applications. The new process offers high school students a self-service page in WebSMART to complete the application and to upload their completed form online. Admissions and Records office will receive a workflow once the student submits the application. There are 3 college programs available to the students:

- Concurrent Enrollment
- Middle College
- Jump Start (not offered at Canada College)

### 1.1 College Connection Application Workflow Process Flow

Below shows the process flow of the College Connection Application.

Figure 1 College Connection Application Workflow Process Flow Start Owner: Student Action: use College Connection Application from WebSmart to upload College\_Connection\_Application their completed form. Owner: System Automated Create\_Workflow Action: Set to run at 5 minutes interval to upload application and documents to workflow and WebxTender Owner: College Staff Action: Review details and completion of the application, and any Review\_Workflow additional documents uploaded. If any alerts appear in the workflow, review and resolve if necessary Owner: College Staff Review\_Banner Action: Review relevant details of student in Banner Owner: System Automated Action: When staff approves the workflow, system reviews if all alerts are resolved. If there are any alerts, system sends the workflow back to the worklist for staff to resolve Owner: College Staff Action: Approve or Deny the application. Approved NOTE: This is the final manual step in the workflow. No changes Denied s allowed upon this action. Owner: System automated Action: Create/Update student's records in SEADETL, Update\_SEADETL\_SGASADD\_SFAREGS SGASADD and SFAREGS accordingly. Owner: System Automated Notify\_Student\_In\_Email Action: Notify student at their smccd.edu email account the result of their application. Owner: Student Receive\_Confirmation Action: Login to student's smccd.edu account for the result of their application Finish

# 2 Prerequisite

In addition to having access to Banner and WebSMART, you will also need access to the following in the appropriate environment:

- 1) Workflow. For example, access link for PROD: Workflow
- 2) Webxtender (aka BDM). For example, access link for PROD: Webxtender

In Banner - User Portal is where you can find all the points of access for PROD environment:



#### 2.1 Workflow Roles

There are 9 workflow roles created for this process. Each college has 3 workflow roles, one for each program:

- College of San Mateo Concurrent Enrollment, Middle College, Jump Start
- Canada College Concurrent Enrollment, Middle College, Jump Start
- Skyline College Concurrent Enrollment, Middle College, Jump Start

In order to process workflow, you must be assigned to one or more of these workflow roles. The roles determines which of the submitted student applications will be available in your worklist. Below are the current users with their workflow login id and workflow assignments.

Figure 3 Workflow Roles and Users **Concurrent Enrollment Role Middle College Role** Jump Start Role CSM Srinivasan, Niruba - srinivasann Srinivasan, Niruba - srinivasann Srinivasan, Niruba - srinivasann Villareal, Henry - villarealh Villareal, Henry - villarealh Villareal, Henry - villarealh

	villareal, Herriy - villarealli	viliareai, nem y - viliaream	villareal, Herriy - villarealli
	Griego, Erica - griegoe	Griego, Erica - griegoe	Griego, Erica - griegoe
CAN	Ruth Miller- miller	Ruth Miller-miller	None
	Vivien Huynh- huynhv	Vivien Huynh- huynhv	
	Maria Lara- lara	Maria Lara- lara	
SKY	Will Minnich- minnichw	Same as Concurrent Enrollment	Same as Concurrent Enrollment
	Sue Lorenzo-lorenzo		
	Martin Marquez- marquezm		
	Steven Trinh- trinhs		
	Gretel Barreto- barretog		
	Minerva Velasquez- velasquezm		
	Elnore Mariano- marianoe		
	Adriana Johnston – armasa		
	Matthew Ledesma-ledesmam		
	Martina Center - centerm		
	Maira Delgado- delgadomaira		

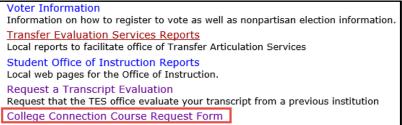
	<b>Concurrent Enrollment Role</b>	Middle College Role	Jump Start Role
SKY	Raymond Jones- jonesr		
	Michael Stokes- stokesm		
	Anne Delarosa - delarosaa		
	April Quok - quoka		
	Cindy Suarez - suarezc		

# 3 Workflow Step by Step

## 3.1 Submit College Connection Application

A student logins to WebSMART, navigate to **Student** tab. At the bottom of the page is the College Connection Course Request Form link.

Figure 4 College Connection Application in WebSMART



#### NOTE:

For testing in TRNG, MAKE SURE you are logged in to Banner in TRNG, then reset a student's login PIN in TRNG, in order for you to login on WebSmart as the student.

#### Click on College Connection Course Request Form link to open the online application.

Figure 5 College Connection Application Step by Step Home Student Financial Aid My Profile

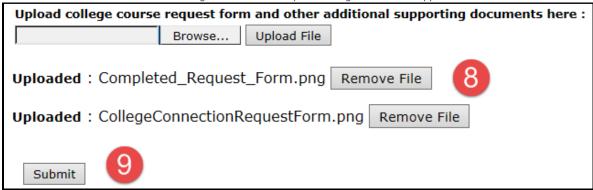
	BACK TO STUDENT MENU	SITE MAP	HELP	EXIT
Steps to submitting your College Connection Course Request form  1. Make sure the information below is accurate. 2. Save your document in a format that will allow you to upload. 3. Upload the COMPLETED College Connection Course Request Form by clicking the "Browse" but 4. When all your documents are uploaded, click the "Submit" button to complete the request.  Note: Incomplete forms will NOT be processed.	ton, followed by "Upload F	ile" button.		
Name of Student : Student ID : My.smccd.edu Email : High School(s) Attended : Out of state high school *If your high school is different from the above, please enter:  Term : Spring 2017 V College : College of San Mateo V Program : Select one V  Upload college course request form and other additional supporting documents here :  Browse Upload File				
Back to Student Menu				

Follow the steps labelled 1 to 7 as described below:

1) Review the details of the student in Banner.

- 2) If the student has additional high schools that are not shown in **High School(s) Attended**, it can be entered
- 3) Select the **Term** to apply to. [The list of terms available is defined in GTVSDAX.]
- 4) Select the **College** to apply to.
- 5) Select the **Program** to apply to.
- 6) Click Browse to open the Choose File to Upload pop-up window. Once a file is selected, it is ready for upload.
- 7) Click **Upload File** to upload the file. Example of two files being uploaded:

Figure 6 Submit Complete College Connection Application



To upload multiple documents, repeat steps 6 and 7. Currently any document types can be uploaded, with the exception of EXE file types. (Additional file types maybe excluded later on if they are considered inappropriate for upload.)

- 8) If the incorrect file is uploaded, click **Remove File** next to the file name to remove it.
- 9) Once all the documents are uploaded, click **Submit** to complete the application. An acknowledgement page is displayed once the application is submitted successfully.

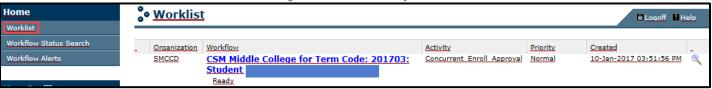
Home BACK TO STUDENT MENU SITE MAP College Connection Course Request Form is now submitted Thank you for submitting the College Connection Course Request form. After review, an email notification will be sent to you at your my.smccd.edu email account. Please note that many courses have prerequisites that must be fulfilled before you can register. Pre-requisite information is available in our catalog online. You can schedule an appointment to take the placement test(s) by going to: http://collegeofsanmateo.edu/testing/ Name of Student Student ID My.smccd.edu Email High School(s) Attended : Out of state high school Additional High School(s): Term : Spring 2017 College : College of San Mateo Program : Middle College File(s) submitted : Completed\_Request\_Form.png CollegeConnectionRequestForm.png Back to Student Menu

Figure 7 College Connection Application Confirmation

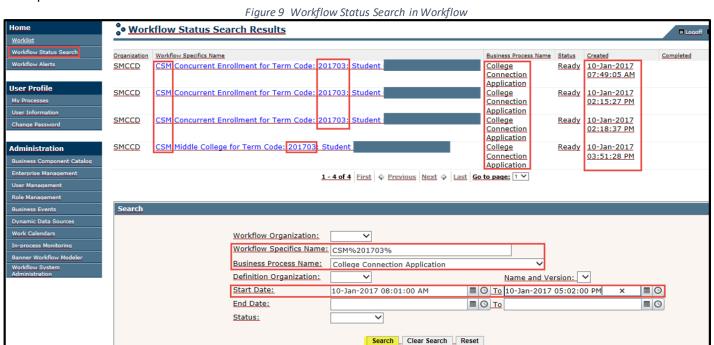
## 3.2 Query Workflow

A job is scheduled to run at 5 minutes interval, which will process all submitted applications. A workflow is created for each successful submission. You will login to Workflow to find the **Worklist** to be completed for your job role(s). An example of the worklist:

Figure 8 Worklist in Workflow



You can also search for all open and completed workflows from the **Workflow Status Search**. The Business Process Name is **College Connection Application**. A wild card (%) search can be used on the **Workflow Specifics Name**. An example of a search and search results:



#### 3.3 Process Workflow

To process a workflow, click on one of the **Workflow** links to open the workflow. Please note that once you click on a workflow, it is reserved by you, and only you or a system administrator can release it. Refer to the section on Release a Reserved Workflow on how to release it.

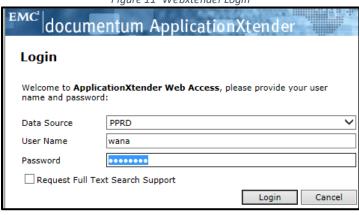
Worklist Home College Connection Approval Worklist Hide Menu Logoff Help Workflow Status Search Workflow Alerts Student Application Information Student ID: **User Profile** First Name: Last Name: User Information High School: Out of state high school Change Password Additional High School: 201703 Term: Administration College: College of San Mateo **Business Component Catalog** Program: Concurrent Enrollment Enterprise Management Click Here to View Document Review Submitted Request: User Management Role Management Alerts: Service assignment MIDN exists for this student. **Business Events** \* Action Dynamic Data Sources Work Calendars OApprove Openy In-process Monitoring Banner Workflow Modeler Notes to applicant (optional): Internal Notes (optional): Complete Save & Close Cancel 6

Figure 10 Process Workflow

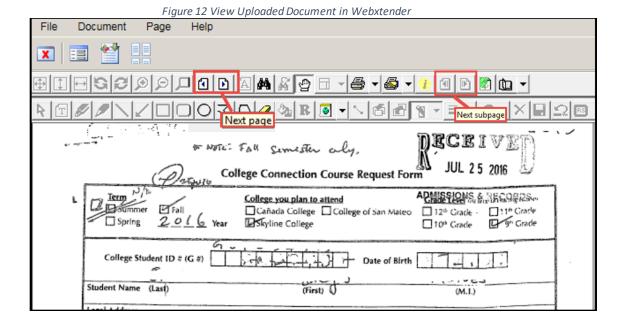
Follow the steps labelled 1 to 9 as described below:

- 1) Review the details of the applicant in Banner.
- 2) Click on link **Click Here to View Document**. It will prompt for your login to Webxtender. Login as requested in order to view the uploaded document.

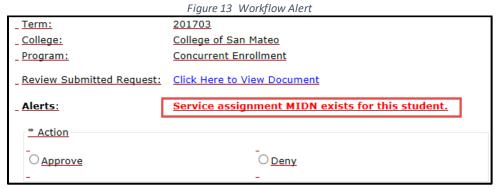
Figure 11 Webxtender Login



Once logged in, the first document will be displayed in Webxtender. If there are more than one document uploaded, you can use **Next Page** to view additional documents.



3) If there is an alert discovered for the student, it will be displayed next to the **Alerts** prompt. For example, if a service assignment already exists for the student for Concurrent Enrollment, you will see the following alert in the workflow:



<u>IMPORTANT NOTE</u>: You MUST resolve the alert, either by contacting the student, or remove the conflict in Banner before you can approve the applicant.

- 4) Internal Notes is an optional field, where comments can be entered by the workflow reviewer.
- 5) If Internal Notes is entered, but the review process is not ready to be finalized, you can use the **Save &Close** button to save the changes.
- 6) If no changes is made, you can click **Cancel** to leave the workflow.
- 7) If there is additional notes to be sent to the applicant, for example, college specific message, uploaded document is incomplete or image is not clear, it can be entered in the **Notes to applicant** text box. This will be sent along with the approved or denied email to the applicant.
- 8) Once review process is finalized, select **Approve** or **Deny** on the workflow.
- 9) Click **Complete** to complete the workflow. No further changes can be made after the workflow is completed. <a href="MPORTANT NOTE">IMPORTANT NOTE</a>: As stated previously, all alerts MUST be resolved before the workflow can be approved. If there are outstanding unresolved alerts during approval, the system will return the workflow to the worklist, and the workflow will not be approved.

#### 3.4 Approve or Deny Application

When an application is approved, a number of events can follow, depending on the college and program that the student applied to.

- 1) Create Service Assignment in SEADETL.
  - o If the student applied for **Concurrent Enrollment**, a service assignment of **CONC** is created for the college and term.
  - o If the student applied for **Middle College**, a service assignment of **MIDC** (for continuing student) or **MIDN** (for new student) will be created.
  - o There is currently no Service Assignment identified for **Jump Start** program.
- 2) For Skyline College only, create Student Cohort in SGASADD.
  - o If the student applied for **Middle College**, **MIDDLE2** Cohort Code will be created.
  - o If the student applied for **Jump Start**, **JUMP2** Cohort Code will be created.
- 3) For **Middle College** application, update student's **Fee Assessment Rate** in SGBSTDN to **MIDX**. For Concurrent Enrollment and Jump Start, the **Fee Assessment Rate** is 1.

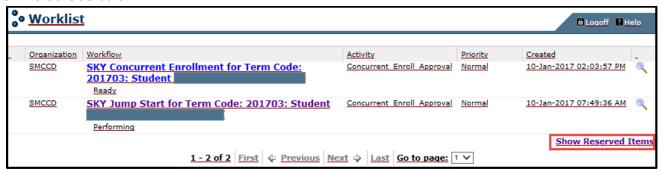
If an application is denied, no updates is made to the student's records in Banner.

# 4 Advance Topics

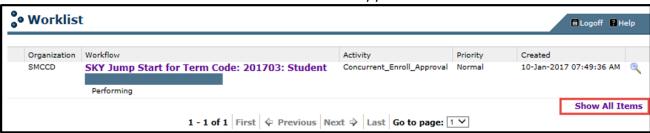
#### 4.1 Worklist - Show All Items and Show Reserved Items

In the worklist, you can see all new workflow items, and items reserved by you. The default shows all items.

Click on the **Show All Items** to see the list of workflows available to all users in the same role(s). Below worklist shows all items. This is the default.



Click on **Show Reserved Items** to see the list of workflows reserved by you. Below worklist shows reserved items.



#### ✓ BEST PRACTICE

As a best practice, begin with the Reserved Items daily, and complete the list as much as possible. Over reserving the worklist can result in unnecessary delay in the processing of the applications.

#### 4.2 Release a Reserved Workflow

#### Workflow Reserved by you

If you have reserved a workflow and you have not completed the workflow, you can release it back to the worklist for all users.

In Worklist, search for your workflow, and click on the magnifying glass on the far right to open the details.



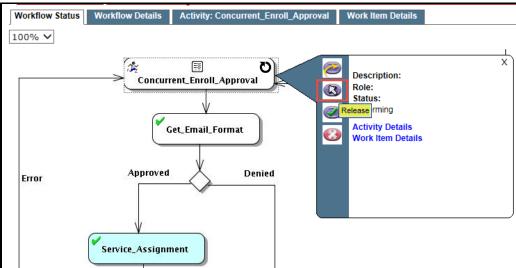
Click on the **Release** arrow shown below to release the workflow. The workflow will now be available to all users. The **Status** will be changed from **Performing** to **Ready** automatically.



#### Workflow Reserved by others (FOR ADMINISTRATOR ONLY)

This is only available to system administrators, or users with "Student Admissions and Records Owner" role.

In **Workflow Status Search**, search for the specific workflow, and click on the workflow link to open the details. Select the **Concurrent\_Enroll\_Approval** activity. Click on the **Release** arrow shown below to release the workflow. The workflow will now be available to all users. The **Status** will be changed from **Performing** to **Ready** automatically.

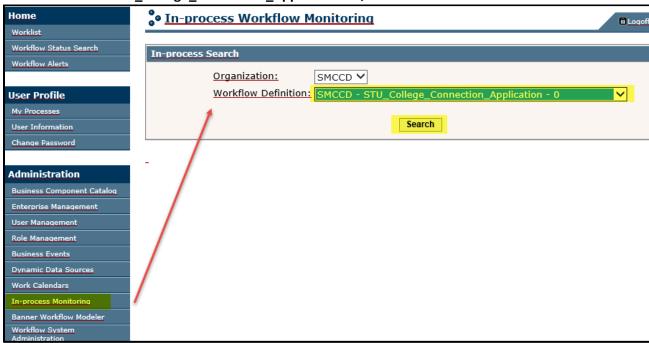


To release workflows that are reserved by a particular user, refer to the section on **View In-Process Workflow** to determine which are the workflows that are reserved, and release it there.

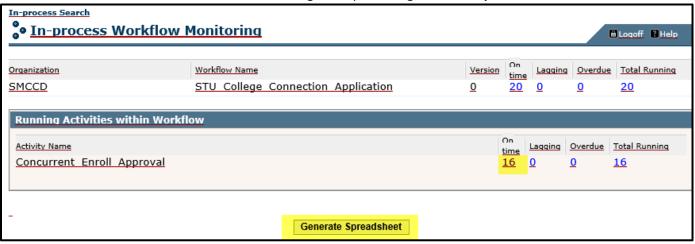
### 4.3 View In-Process Workflow (FOR ADMINISTRATOR ONLY)

This is only available to system administrators, or users with "Student Admissions and Records Owner" role.

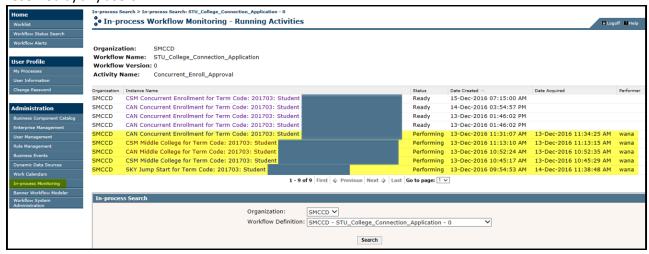
Look for **In-Process Monitoring** option under Administration in your home menu. In the Workflow Definition, look for **SMCCD – STU\_College\_Connection\_Application – 0**, and click Search.



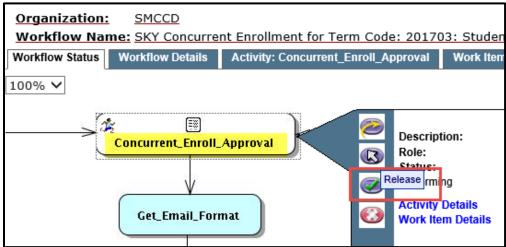
The search result displays a summary detail of the in-process workflows. You can drilldown to see the workflows that are new and reserved. You can also get a report using **Generate Spreadsheet**.



Drilldown on the **On Time** number to see the list. The **Performer** column (on the right hand side) shows the workflows that have been reserved. If the **Performer** value is blank, the workflow is new and is not yet reserved by any users.



Click on one of the **Instance Name** to see the workflow detail. You can also release a workflow that is reserved by another user.



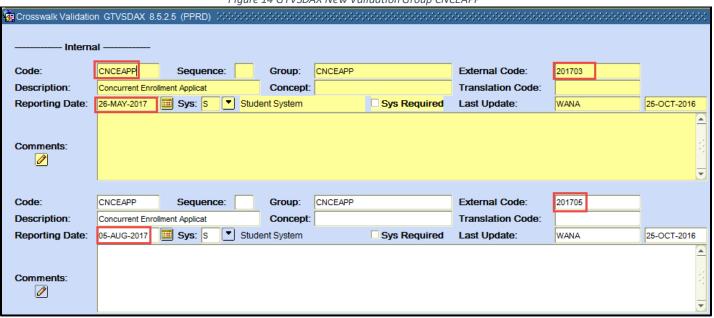
# 5 Setup in Banner

This section is primarily for ITS. It can also be used as a reference for users to review the Terms available on the application.

### 5.1 GTVSDAX – new group CNCEAPP

A new validation group CNCEAPP is added to setup the Terms available for the application. New term will be added as it is opened for application, and the Reporting Date will be set to the term's end date.

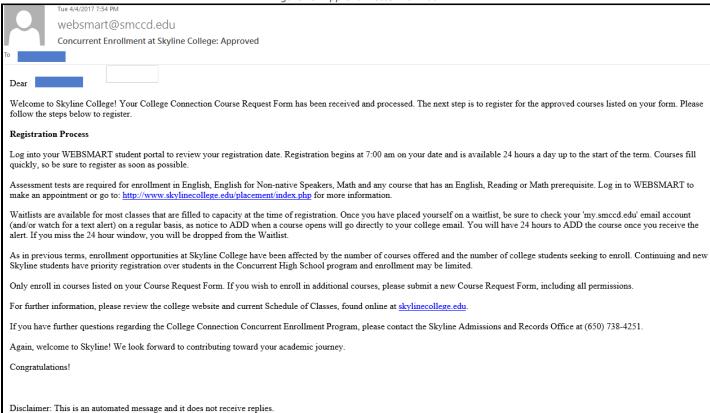
Figure 14 GTVSDAX New Validation Group CNCEAPP



# 6 Sample Approval and Denied Emails Formats

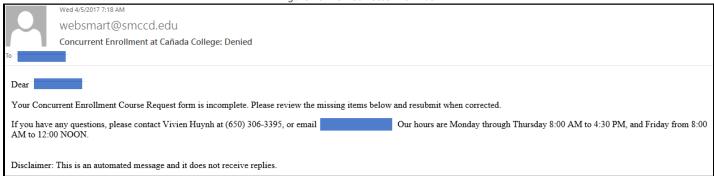
#### A sample approval email to applicant.

Figure 15 Approval Letter Format



#### A sample denied email to applicant.

Figure 16 Denied Letter Format



# 7 Environment and Reference Links

- Latest College Connection Application Workflow Getting Started document
- High School Students
- College Connection Program
- PROD instance can be found in Banner User Portal:



- TRNG testing instance can be found in Programmer's Portal:
  - Banner TRNG Login
  - WebSMARTTRNG Login
  - Workflow TRNG EIS-Login
  - direct link to AppXtender: AppXtender BDM-DEV

