Conference **guidebook** App

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**Wi-Fi Access**

Wireless internet is complimentary in the convention center and Renaissance Hotel. You can upgrade to enhanced high speed at the Renaissance for an additional cost.

**Convention Center Wi-Fi:**
- **Access code:** SACRAO
- **Password:** sacrao2015
USING WORKFLOW TO PROCESS SPECIAL REQUESTS

SACRAO 2015 – Mobile, Alabama
Session M4.09; Room 203B
February 2, 2015; 2:45 pm – 3:45 pm.
YOUR PRESENTER

- Debby Hill, Associate Registrar
  Office of University Registrar
  The University of Southern Mississippi

- Student Records – 2006 - present
- Academic Advising – 1990 - 2005

- Alliance 2015 Conference Chair
  Nashville, March 2015
AGENDA

• Issues with Late Add/Drop requests
• Previous Student Records Workflow processes
• Academic Approval Structure for workflow
• Example of Special Requests using delivered workflow
• Results from new process
• Future plans
• Q & A
SOUTHERN MISS & ORACLE

- 1 institution with 3 campuses
- Undergraduate and Graduate careers
- ~14,792 students w/ ~3,500 faculty
- 17 staff members in Registrar’s Office with 5 working with various registration functions
- PeopleSoft since 2001; v9.0 bundle 35 toolset 8.53
- Live in all modules (SR, AA, AD, HR, STF, FIN, etc.)
- HR/CS split - Nov 2014
ORIGINAL PERMISSION TO LATE
ADD/DROP PROCESS
ACADEMIC CALENDAR

- Pre-registration in the October for spring
- Open registration
- SPECIAL PERMISSION REQUIRED for ADD/DROP
- Last day for any enrollment transactions for session

Spring 2015
CARBON PAPER PROCESS

- Inefficient
- Insecure
- Untraceable
- Unmanageable
USM’S EVOLUTION OF WORKFLOW PROCESSES

- Financials/Purchasing began using – 2007
- Online withdrawals requests from students - 2009
- Grade Changes – 2011
- Special Permission Requests – Jan 2014
MAIN OBJECTIVES IN WORKFLOW PROCESS

• Must use same approval structure
• Must allow more users to process to avoid delays
• Must be easy to image for records
• Must be able to notify appropriate people regularly
• Must be able to analyze data for administrators
• Must be E-A-S-Y for students to understand
• Must be simple/quick for instructors/chairs to process
ACADEMIC APPROVAL STRUCTURE
APPROVAL STRUCTURE: REDESIGNED

- Current effective date and Approvals per Campus and Career
TECHNICAL SPECS
APP DESIGNER PROJECT
APP DESIGNER PROJECT
SPECIAL REQUEST PROCESS: NEW & IMPROVED
STUDENT INITIATES REQUEST VIA STUDENT CENTER

- Standard Add Process
- Standard Drop Process
- Swap Not available

### Add Classes

1. **Select classes to add - Enrollment Preferences**

   Spring 2013-2014 | Undergraduate | Univ of Southern Mississippi

#### PSY 110 - General Psychology

<table>
<thead>
<tr>
<th>Class Preferences</th>
<th>Grading</th>
<th>Graded</th>
<th>Units</th>
<th>Requirement Designation</th>
</tr>
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<tbody>
<tr>
<td>PSY 110-H002</td>
<td></td>
<td></td>
<td>3.00</td>
<td>Gen Ed Curriculum Area 5 - Decision-Making &amp; Resp.</td>
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<tr>
<td>Session</td>
<td>Regular Academic Session</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Career</td>
<td>Undergraduate</td>
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<td></td>
</tr>
</tbody>
</table>

- Gen Ed Curriculum Area 5 - Decision-Making & Resp.
- Web Supplement

### Section Information

<table>
<thead>
<tr>
<th>Section</th>
<th>Component</th>
<th>Days &amp; Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Start/End Date</th>
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</thead>
<tbody>
<tr>
<td>H002</td>
<td>Lecture</td>
<td>MoWe 2:00PM - 3:15PM</td>
<td>JGH 116</td>
<td>Pepper Hanna, Tammy Greer</td>
<td>01/14/2014 – 05/09/2014</td>
</tr>
</tbody>
</table>
STUDENT INITIATES REQUEST VIA STUDENT CENTER – CONT.

- Confirm
STUDENT INITIATES REQUEST VIA STUDENT CENTER – CONT.

• Results – added button (link)
• Link (request) is only available AFTER deadlines but PRIOR to Last Date to Enroll for appropriate session code of class
STUDENT’S REQUEST PAGE

Special Permissions

This special permission request is ONLY for the class number indicated below and is being requested after the normal processing deadline. If you are lacking any overrides for course requisites, overload, closed section, department consent, you will need to provide any necessary explanation in the request process to the instructor and/or chair of the course.

Empl ID: [Redacted] Name: [Redacted]
Term: 4145 Spring 2013-2014 Current Hours: 16.00
Major: Pre-Social Work Academic Level: Freshman
Email: [Redacted]@eagles.usm.edu

Class Nbr: 1494 Subject: PSY Catalog Nbr: 110 Section: H002 Session: Regular Campus: HBG
Hours: 3.00 Instructor: [Redacted]
Late Add Reason: 

If you are making any other changes to your schedule this semester, list the detail in the comment box to expedite your request.

Comments:

☐ By submitting this request, I understand that if approved, I am responsible for all tuition charges associated with the change in my schedule.

☐ By submitting this request, I understand that if approved, I must meet with my instructor to obtain a syllabus and complete any missed assignments.

Submit Cancel

For a hard copy, screen print this page before submitting.

• Class information comes from results page.
STUDENT CONFIRMATION

Your request was successfully submitted to be reviewed by the appropriate personnel.

Upon completion of the process, you will receive an email notification to your USM email with the final decision. Although the complete process may take 1-2 business days, all action taken will be as of the date of your request.

Return to Student Center

• If a student attempts to request special permission on same class number a second time, he will get a WIN message that states a request has already been submitted.
WORKFLOW DELIVERED

- Sends email notifications to instructor (all roles) attached to Schedule of Classes

Name, 863429, has requested to add/drop PSY 110, Section H002, Class Number 1494, for the Regular Academic Session for term Spring 2013-2014. Please log into SOAR to review the comments on the request and process (approve/deny) through your SOAR worklist. If action is not taken with 5 business days of the request, the request will be VOIDED.

Note: Approvals of add/drop requests include overrides of any necessary prerequisites, closed class, and department/instructor consent. The approvals will not include any time conflicts or service indicator holds.

USM AUTOMATED EMAIL - DO NOT CLICK REPLY
WORKFLOW DELIVERED

- Populates on worklist for instructor (all roles) attached to schedule of classes.
This special permission request is ONLY for the class number indicated below and is being requested after the normal processing deadline. Please verify the student's need for course requisites, overload, closed section, and department consent in your review process. Your approval of the special permission request authorizes the Registrar's Office to override requisites, closed sections, and department consent. If the error message of an overload or time conflict exists in the registration process, the Registrar's Office will notify the student to follow up with the chair of the department prior to processing.

- Each Instructor has ability to review
- Once cleared off of one worklist, removed from all worklist
INSTRUCTOR’S ACTION

No
• email to student
• drops off of ALL worklist

Yes
• email to chair level
• drops off instructor-level worklist,
• populates chair-level worklist

Pending
• No email;
• remains on worklist until cleared as Yes/No

NOTE: If this is a Late Drop Request, a grade of W (withdrawal) will automatically be applied.
INSTRUCTOR’S CONFIRMATION

The student's request has been successfully recorded and will be forwarded to the next appropriate person(s) for action if appropriate. If you have any questions regarding the status of the request, send student and class details to registrar@usm.edu.

Click HOME to continue.

• Worklist for all attached at instructor-level will be cleared.
DEPARTMENTAL NOTIFICATION

• Email sent to and worklist populated for all admins attached to 'appropriate' Approval Structure
DEPARTMENTAL DECISION

This special permission request is ONLY for the class number indicated below and is being requested after the normal processing deadline. Please verify the student's need for course requisites, overload, closed section, and department consent in your review process. Your approval of the special permission request authorizes the Registrar's Office overrides for requisites, closed sections, and department consent. If the error message of an overload or time conflict exists in the registration process, the Registrar's Office will notify the student to follow up with the chair of the department prior to processing.

<table>
<thead>
<tr>
<th>Empl ID: 883429</th>
<th>Name: (Hidden)</th>
<th>Special Request #: 11</th>
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<tbody>
<tr>
<td>Term: 4145</td>
<td>Spring 2013-2014</td>
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<tr>
<td>Major: Pre-Social Work</td>
<td>Academic Level: Freshman</td>
<td>Current Hours: 16.00</td>
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<tr>
<td>Class Enrollment</td>
<td>Catalog Nbr: 110</td>
<td>Academic Group: EDP5Y</td>
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<tr>
<td>Class Nbr: 1494</td>
<td>Subject Area: PSY</td>
<td>Academic Organization: PSYCHOLOGY</td>
</tr>
<tr>
<td>Subject Area: GLY</td>
<td>Section: Session: H002</td>
<td>Hours: 3.00</td>
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<tr>
<td>Class Section: H003</td>
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<td>Campus: HBG</td>
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<tr>
<td>Session: Regular</td>
<td>Hours: 1.00</td>
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<tr>
<td>Instructor: Hann</td>
<td>Instructor Decision: Yes</td>
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<tr>
<td>Instructor Comments: Need to check w instructor. Verified can attend.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registrar Reviewer: (Hidden)</td>
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</tr>
</tbody>
</table>

- Same Request page
- Same options & process as instructor level
- Adds Instructor comments and date/time stamp
DEPARTMENT’S ACTION

**No**
- email to student and instructor
- drops off of ALL worklist

**Yes**
- drops off chair-level worklist,
- populates Registrar’s Office worklist based on permission list

**Pending**
- No email;
- remains on worklist until cleared as Yes/No
REGISTRAR’S OFFICE PROCESSES

- Worklist separated by campus through security
- Multiple personnel to monitor
- No emails to Registrar’s Office
ENROLLMENT REQUEST PANEL

- Opens a new window
- Generates enrollment request ID with data filled in.
- Submit
REGISTRAR’S ACTION

- Yes – email to student process is complete; comments from Instructor, Chair and Registrar’s Office are included
- No – email to student and instructor with all comments
- Pending – email to student and instructor with all comments
- VOID (No) request after 5 business days of no activity
REGISTRAR’S ACTION

• Enters appropriate comments and SAVE.
• SAVE automatically generates an email to the student and/or instructor.
• PRINT button creates an XML report
PRINT TO IMAGE

- XML report
- Print to Image Now
- Link to student record in ImageNow

| The University of Southern Mississippi Special Request Report |
| Permission Number: 1993 |

**STUDENT INFORMATION**

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<tr>
<th>Student:</th>
<th>Empid:</th>
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<tr>
<td></td>
<td>863429</td>
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<td>Career:</td>
<td>UGRD</td>
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<td>Term:</td>
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<table>
<thead>
<tr>
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<th>Class Number</th>
<th>Section</th>
<th>Hours</th>
<th>Late Reason</th>
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<tr>
<td>Late Add</td>
<td>1494</td>
<td>H002</td>
<td>3</td>
<td>Closed Class</td>
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Comments: This field is required
Date requested: 2/27/2014 8:09:29 PM

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<th>Approval Workflow Dates and Approvers</th>
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<tbody>
<tr>
<td>Status</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>Y</td>
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Registrar’s Office Processing
Enrollment Request ID: 0003040774

<table>
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<tr>
<th>Status</th>
<th>RO Staff</th>
<th>Date</th>
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<tbody>
<tr>
<td>Y</td>
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<td>2/27/2014 8:47:47 PM</td>
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RESULTS
Special Permissions Requested

<table>
<thead>
<tr>
<th>Year</th>
<th>Late Add</th>
<th>Late Drop</th>
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<tbody>
<tr>
<td>Sp 14</td>
<td>2164</td>
<td>626</td>
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<tr>
<td>Su 14</td>
<td>330</td>
<td>73</td>
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<tr>
<td>Fa 14</td>
<td>809</td>
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<tr>
<td>Sp 15</td>
<td>449</td>
<td>170</td>
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</table>
FUTURE PLANS
FUTURE PLANS FOR WORKFLOW

• Design Schedule of Class requests for departments
• Design Advising substitutions/exception requests
• Design Degree Applications
• Design change of major requests
QUESTIONS?
CONTACTS

- Debby.Hill@usm.edu – Functional/Technical