File | Home | Insert | Page Design | Data | Properties | Layout

Name: | Data Type:

Requesting Campus | Choice (menu to ...)

Data Format | Default Value | Change Binding | Edit Choices

Read-Only
Cannot Be Blank
Change Control

Height Auto
Width 210 px
Margins

Shading | Borders

Add Rule | Manage Rules

Field Properties | Control Properties

Properties | Choices | Modify | Control Size | Color | Rules

Table content:

Proposed Enhancement and Alternatives:

Option:	Proposed Enhancement and Alternatives:		Estimated Manual Hours:	Number of Students Affected:	Number of Administrative Users Affected:
1	Perform proposed enhancement...	ⓘ			
2	Continue with current business practice...	ⓘ			
3		ⓘ			
Upcoming Oracle Improvements		ⓘ			

Requesting Campus Required Review:

Requesting Campus Review Status: | Requesting Campus Review Status ▼

Request Presented By: | <e-mail addresses>

Review:

Business Owners(s)	<e-mail addresses>	▼
Campus Functional Analyst(s)	<e-mail addresses>	▼
Campus Developer (if to be assigned)	<e-mail addresses>	▼
Campus Lead(s)	<e-mail addresses>	▼
AVP(s) or Designee(s)	<e-mail addresses>	▼

Requesting Campus Comments

Fields panel:

Fields

Drag a field to add it to the form.

Insert a Field:

- Requesting Campus Review S
- Business Owner Review Statu
- Campus Functional Analyst(s)
- Campus Functional Analyst R
- Campus Developer (if to be a
- Campus Developer Review St
- Campus Lead(s)
- Campus Lead Review Status
- AVP(s) or Designee(s)
- AVP or Designee Approval St
- Requesting Campus Comment
- Estimated Development Hour:
- ES Developer (if Campus Dev
- ES Comments
- ES Review Status
- ES Manager
- EMPS Analyst

Show advanced view

Actions

Add Field

Manage Data Connections...

Rules panel:

Rules

Requesting Camp...

Update Blank Requesting Campus ...

New ▾

Details for:

Update Blank Requesting Campus BC

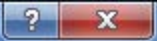Condition:

Requesting Campus Review Sta...

Rule type:

Action

Run these actions: * | Add ▾

Set a field's value: field1 = Displ...

☐ Don't run remaining rules if the condition of this rule is met

Help with Rules

Define E-mail Message

To: Variable: varEmailUHCLAVPDesignee;Variable: varEmailUHCLBusOwner;Variable: varEmailUHCL

CC: Current Item:EMPS Analyst

Subject: Other UHS Campuses Review Notification of Enhancement Request [%Current Item:Requ

Tahoma

An enha
Item:Re
request
forwarde
Please c
applicab
days.

A new ta
expiratio
Item:72H

Reques

[%Curre

Descripti

Add or C

String Builder

Name:

Other UHS Campuses Review Notification of Enhancement Request [%Current Item:Request Number%]: [%Current Item:Enhancement Request Title%]

Add or Change Lookup   OK   Cancel

Define E-mail Message

To: `Variable: varEmail_Mtg_RequestPresenter;Variable: varEmail_Mtg_EMPSDirector;Variable: varEmail_Mtg_ESDirecto`

CC: `Variable: varEmailCampusAVPDesignee;Variable: varEmailUHCLAVPDesignee;Variable: varEmailUHDAVPDesignee;V`

Subject: `Meeting Notification for Enhancement Request [%Current Item:Request Number%]: [%Current Item:Enhanc`

Tahoma | 10 | **B** *I* U | Automatic

A formal review meeting has been scheduled by change management for enhancement request '[%Current Item:Request Number%]: [%Current Item:Enhancement Request Title%]'.

Description

UHCL App
UHD App
UHM App
UHV App

Meeting
Start: [%
End: [%V   e/Time%]
Location: [%
Phone/Bri
Topic: [%

Identified
    Preser
    EMPS
    ES Director(s): [%Variable: varEmail_Mtg_ESDirector%]
    Campus Functional Analyst(s): [%Variable: varEmail_Mtg2_CampusFuncAnalysts%]
    Campus/ES Developer(s): [%Variable: varEmail_Mtg2_CampusESDeveloper%]
    Campus Lead(s): [%Variable: varEmail_Mtg2_CampusLeads%]
    Technical Manager(s): [%Variable: varEmail_Mtg2_TechnicalManagers%]
    EMPS Analyst(s): [%Variable: varEmail_Mtg2_EMPSAnalysts%]

Select Users

Type a Name or E-mail Address:

Or select from existing Users and Groups:

People/Groups from SharePoint site..
Workflow Lookup for a User...
User who created current item
9.0 Super Users
Academic Advising Super Users
Admission Super Users
Anderson, Izzy
Anderson, Josie
Anderson, Lurinda C
Arias-Rodriguez, Andrea
Armstrong, Sandra G
Arnold, Richard A
Arredondo, Nora M
Arte Publico Press
Backstrom, Christian

Add >>
<< Remove
Move Up
Move Down

Selected Users:

Variable: varEmail_Mtg_RequestPres
Variable: varEmail_Mtg_EMPSDirecto
Variable: varEmail_Mtg_ESDirector
Variable: varEmail_Mtg_CampusFunc
Variable: varEmail_Mtg_CampusESD
Variable: varEmail_Mtg_CampusLead
Variable: varEmail_Mtg_TechnicalMa
Variable: varEmail_Mtg_EMPSAnalys

OK | Cancel

Add or Change Lookup | OK | Cancel

Define E-mail Message

To: e: varEmail_Mtg_CampusLeads;Variable: varEmail_Mtg_TechnicalManagers;Variable: varEmail_Mtg_EMPSAnalysts

CC: Variable: varEmailCampusAVPDesignee;Variable: varEmailUHCLAVPDesignee;Variable: varEmailUHDAVPDesignee;V

Subject: Meeting Notification for Enhancement Request [%Current Item:Request Number%]: [%Current Item:Enhanc

Tahoma | 10 | **B** *I* <u>U</u> | ■ Automatic

A formal review meeting has been scheduled by change management for enhancement request '[%Current Item:Request Number%]: [%Current Item:Enhancement Request Title%]'.

Descriptio

UHCL App
UHD Appr
UHM App
UHV Appr

Meeting
Start: [%
End: [%V
Location:
Phone/Bri
Topic: [%

Identified
    Presen
    EMPS
    ES Director(s): [%Variable: varEmail_Mtg2_ESDirector%]
    Campus Functional Analyst(s): [%Variable: varEmail_Mtg2_CampusFuncAnalysts%]
    Campus/ES Developer(s): [%Variable: varEmail_Mtg2_CampusESDeveloper%]
    Campus Lead(s): [%Variable: varEmail_Mtg2_CampusLeads%]
    Technical Manager(s): [%Variable: varEmail_Mtg2_TechnicalManagers%]
    EMPS Analyst(s): [%Variable: varEmail_Mtg2_EMPSAnalysts%]

Select Users

Type a Name or E-mail Address:

Or select from existing Users and Groups:

People/Groups from SharePoint site..
Workflow Lookup for a User...
User who created current item
9.0 Super Users
Academic Advising Super Users
Admission Super Users
Anderson, Izzy
Anderson, Josie
Anderson, Lurinda C
Arias-Rodriguez, Andrea
Armstrong, Sandra G
Arnold, Richard A
Arredondo, Nora M
Arte Publico Press
Backstrom, Christian

Add >>
<< Remove
Move Up
Move Down

Selected Users:

Variable: varEmailCampusAVPDesign
Variable: varEmailUHCLAVPDesignee
Variable: varEmailUHDAVPDesignee
Variable: varEmailUHMAVPDesignee
Variable: varEmailUHVAVPDesignee

OK | Cancel

Add or Change Lookup | OK | Cancel

| Tertiary Request Workf..._Status Fields Updates | Primary Request Workfl...dditional Field Changes | Primary Request Workflow |

← → ⌂ Enhancement Requests ▸ Workflows ▸ Primary Request Workflow ▸ Editor ▸

To: Variable: varEmailBusinessOwner;Variable: varEmailCampusFuncAnalyst;Variable: varEmailCam

CC: Current Item:Created By

Subject: Approved: Enhancement Request [%Current Item:Request Number%] ([%Current Item: ...

Tahoma ▾ 10 ▾ **B** *I* U ■ Automatic ▾

The request for [%Current Item:Request Number%]: [%Current Item:Enhancement Request Title%] has been updated to 'Approved' by AVP/Designee [%Current Item:AVP(s) or Designee(s)%].

Description: [%Current Item:tmp_Desc (new)%]

If Current Item:UHV AVP(s) or Designee(s) is empty

    Set ApprvlName_UHV to Current Item:UHV AVP(s) or Designee(s)

Else

    Set ApprvlName_UHV to Current Item:UHV AVP(s) or Designee(s)

    then Set tmp_Pending_UHV Approval to Approval Needed

then Set tmp_AVP or Designee Approval Status (before) to Current Item:AVP or Designee Approval Status

then Set Request Status to AVP Approved / EMPS Review

then Set Variable: varRCRS3 to Approved

then Set Date AVP Approved to Current Item:Modified

then Comment: ***HAD 1 MINUTE PAUSE HERE***

then Set Requesting Campus Review Status to Variable: varRCRS3

then Set tmp_RCRS to Variable: varRCRS3

then Set tmp_Requesting Campus Review Status (before) to Variable: varRCRS3

then Email Variable: varEmailBusinessOwner; Variable: varEmailCampusFuncAnalyst; Variable: varEmailCampusDeveloper; ...

then Set wi_Email AVP Apprv/Disapprv to 1

then Calculate Current Item:wi_CummValue (before) plus Current Item:wi_Email AVP Apprv/Disapprv (Output to Variable: c_cummv_wiEmailAVPApprvDisappr

then Set wi_CummValue to Variable: c_cummv_wiEmailAVPApprvDisapprv

then Set wi_CummValue (before) to Current Item:wi_CummValue

then Set wt_Email AVP Apprv/Disapprv to Email Notification Has Been Sent to R...

then Set ES Manager to EMPS/ES Assignments:ES Technical Manager

then Set ES Developer (if Campus Developer not assigned) to Module Campus Defaults:ES Developer

then Comment: ***Cache Tier Variables***

then Set Variable: varEMPSESAssignmentsTier to [%EMPS/ES Assignments:Tier%]

then Set Variable: varEMPSESAssignmentsTier_EMPSAnalyst to EMPS/ES Assignments:Tier

then Set Variable: varEMPSESAssignmentsTier_EMPSDirector to EMPS/ES Assignments:Tier

then Set Variable: varEMPSESAssignmentsTier_ESDirector to EMPS/ES Assignments:Tier

String Builder

Name:

Approved: Enhancement Request [%Current Item:Request Number%] ([%Current Item:Enhancement Request Title%])

Add or Change Lookup   OK   Cancel

Add or Change Lookup

Navigation

Tertiary Request Workf..._Status Fields Updates | Primary Request Workfl...itional Field Changes * | Secondary Request Workflow_Tasks

Enhancement Requests ▶ Workflows ▶ Secondary Request Workflow_Tasks ▶ Editor ▶

Site Objects

- Enhancement Requests
- Lists and Libraries
- Workflows
- Site Pages
- Site Assets
- Content Types
- Site Columns
- External Content Types
- Data Sources
- Site Groups
- Subsites

Workflows

Globally Reusable Workflow
- Approval - SharePoint 2010
- Collect Feedback - SharePoint 2010
- Collect Signatures - SharePoint 2...

List Workflow
- Module Campus Defaults
- Primary Request Workflow
- Primary Request Workflow_Additi...
- Secondary Request Workflow_Ta...
- Secondary Task Workflow
- Secondary Tasks Workflow 2
- Tertiary Request Workflow_Statu...
- zzzConsolidate Appended MultiLin...
- zzzztemp2
- zzzztest custom list
- zzzztest EMPS Assignment
- zzzztest task forn
- zzzztest task lit
- zzzzzztemp
- zzzzzztemp4

If Current Item:Content Type equals 3-Day Other UHS Campuses Review

and Current Item:tmp EMPS Task Status equals 3-Day Other UHS Campuses Review

Pause until Current Item:Due Date

then Update item in Enhancement Requests

then Calculate Enhancement Requests:wi_CummValue plus Enhancement Requests:wi_Other UHS Review - End (Output to

then Update item in Enhancement Requests

then Create item in utilWkflwStatUpdates (Output to Variable: create13)

If Current Item:tmp EMPS Task Status equals 3-Day Other UHS Campuses Review

If Enhancement Requests:EMPS Review Status not equals Completed

or Current Item:Status not equals Completed

Set tmp EMPS Task Status to Other UHS Campuses Review Reminder (7...

then Create item in utilWkflwStatUpdates (Output to Variable: create14)

then Set tmp EMPS Task Status (before) to Current Item:tmp EMPS Task Status

then Create item in utilWkflwStatUpdates (Output to Variable: create15)

then Comment: *Update to Request Status below*

then Update item in Enhancement Requests

then Create item in utilWkflwStatUpdates (Output to Variable: create16)

then Create item in utilWkflwStatUpdates (Output to Variable: create17)

then Email Current Item:Assigned To

then Update item in Enhancement Requests

then Calculate Enhancement Requests:wi_CummValue (before) plus Enhancement Requests:wi_Email EMPS Analyst Review2 (Output to Variable: c_cummv

then Update item in Enhancement Requests

then Log The 3-Day Other UHS Campuses Review p... to the workflow history list

---

Update List Item

List: Enhancement Requests

Field	Value
wi_CummValue	Variable: c_cummv_wiE...
wi_CummValue (before)	Variable: c_cummv_wiE...
wt_Email EMPS Analyst ...	Email Notification Has B...

Add...
Modify...
Remove

Find the List Item

Choose a field from the selected lis
the specific item you want from the data

Field: ID

Value: Current Item:Workflow Item ID

Value Assignment

Set this field:

wt_Email EMPS Analyst Review2

To this value:

Email Notification Has Been Sent to EN ... fx

OK   Cancel

String Builder

Name:

Email Notification Has Been Sent to EMPS Analyst Informing of Expiration of 3-Day Other UHS Campuses Review

Add or Change Lookup   OK   Cancel

Navigation ‹

Tertiary Request Workf..._Status Fields Updates | Primary Request Workfl...itional Field Changes * | Secondary Request Workflow_Tasks | ✕

Enhancement Requests ▸ Workflows ▸ Secondary Request Workflow_Tasks ▸ Editor ▸

If Current Item:Content Type equals 3-Day Other UHS Campuses Review

and Current Item:tmp EMPS Task Status equals Other UHS Campuses Review Reminder (8...

and Current Item:Status equals In Progress

 If Current Item:tmp_Reminder_Counter (before) is less than 2

  Set tmp_Reminder_Counter (before) to 2

 then Pause for 0 days, 0 hours, 24 minutes

 then Calculate Current Item:tmp_Reminder_Counter (before) plus 1 (Output to Variable: varReminderCounter2)

 then Set tmp_Reminder_Counter to Variable: varReminderCounter2

 then Set tmp_Reminder_Counter (before) to Current Item:tmp_Reminder_Counter

 If Current Item:Status equals In Progress

  Email Current Item:Assigned To; Enhancement Requests:tmpPrimaryAssignment2; Enhancement Requests:tmpSecondaryAssignn

Step 9: Set/Calculate Change Management Meeting Appointment Fields

If Current Item:Content Type equals Appoint Change Management Meeting

and Enhancement Requests:tmp_CM Updates (before) is empty

and Current Item:tmp EMPS Task Status is empty

 Set tmp EMPS Task Status to Waiting for CM Meeting Appointment

 then Create item in utilWkflwStatUpdates (Output to Variable: create19)

 then Set Due Date to Enhancement Requests:CM Appointment Due Date

 If Current Item:Assigned To is empty

  Set Assigned To to Enhancement Requests:EMPS Director

Define E-mail Message ? ✕

To: Current Item:Assigned To;Enhancement Requests:tmpPrimaryAssignment2;Enhancement Requ [📖]

CC: Enhancement Requests:EMPS Director [📖]

Subject: Workflow Item NOT COMPLETED, Reminder [%Current Item:tmp_Reminder_Counter%]: ' [...] [fx]

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The appropriate status update and/or update of the associated task is not yet complete.
Please make all appropriate updates (status as well as task) as soon as possible.

Request
[%Enhancement Requests:Request Number%]: [%Current Item:Related Content%]

Description: [%Enhancement Requests:tmp_Desc (new)%]

Task
[%Current Item:ID%]: [%Current Item:Title%]

Select Users ? ✕

Type a Name or E-mail Address:
[ ] [Add >>]

Or select from existing Users and Groups:

People/Groups from SharePoint site...
Workflow Lookup for a User...
User who created current item
9.0 Super Users
Academic Advising Super Users
Admission Super Users
Anderson, Izzy
Anderson, Josie
Anderson, Lurinda C
Arias-Rodriguez, Andrea
Armstrong, Sandra G
Arnold, Richard A
Arredondo, Nora M
Arte Publico Press
Backstrom, Christian

[<< Remove]
[Move Up]
[Move Down]

Selected Users:
Current Item:Assigned To
Enhancement Requests:tmpPrimary
Enhancement Requests:tmpSeconda

[OK] [Cancel]

Add o

Set Request Presenter to Current Item:Created by

Else

    Set Request Presenter to Current Item:Prepared By

then Log Step5: ElseIF (3): IfElse (7-10): Set... to the workflow history list

then Set Campus/ES Developer(s) to [%Module Campus Defaults:ES Developer...

then Set EMPS Analyst(s) to Current Item:EMPS Analyst

then Add 10 minutes to Current Item:Date AVP Approved (Output to Variable: varEMPSAnalystDueDate)

then Set EMPS Analyst Due Date to Variable: varEMPSAnalystDueDate

then Log Block of workflow re: Email EMPSES Re... to the workflow history list

If 1 equals 2

    Log Step 5: Initiating email to the workflow history list

    then Email Coleman, Marie A

    then Log Step 5: TEST EMAIL ISSUES LOG HERE+++... to the workflow history list

    then Set wi_Email EMPS/ES Review1 to 1

    then Calculate Current Item:wi_CummValue (before) plus Current Item:wi_Email EMPS/ES Review1 (Output to Variable: c_cummv_wiEmailEMPSESReview1)

    then Set wi_CummValue to Variable: c_cummv_wiEmailEMPSESReview1

    then Set wi_CummValue (before) to Current Item:wi_CummValue

    then Set wt_Email EMPS/ES Review1 to Email Notification Has Been Sent to E...

then Set workflow status to AVP Approved / EMPS Review

then Log Step 5: Initiation of creation of tas... to the workflow history list

then Log Step5: ElseIF (3): Ending Code: Set C... to the workflow history list

then Collect Assignment of Enhancement Request to ... from Current Item:EMPS Analyst (Output to Variable: Task ID for Creation of EMPS Analyst Assignment Task)

then Log End 'Step 5: Update Workflow for AVP ... to the workflow history list

Step 6: Sister Campuses Email Notification

then Log <u>Step5: ElseIF (3): IfElse (7-10): Set...</u> to the workflow history list

then Set <u>Campus/ES Developer(s)</u> to <u>[%Module Campus Defaults:ES Developer...</u>

then Set <u>EMPS Analyst(s)</u> to <u>Current Item:EMPS Analyst</u>

then Add <u>24</u> <u>hours</u> to <u>Current Item:Date AVP Approved</u> (Output to <u>Variable: varEMPSAnalystDueDate</u>)   ▼

then Set <u>EMPS Analyst Due Date</u> to <u>Variable: varEMPSAnalystDueDate</u>

then Log <u>Block of workflow re: Email EMPSES Re...</u> to the workflow history list

If <u>1</u> equals <u>2</u>

    Log <u>Step 5: Initiating email</u> to the workflow history list

    then Email <u>Coleman, Marie A</u>

    then Log <u>Step 5: TEST EMAIL ISSUES LOG HERE+++...</u> to the workflow history list

    then Set <u>wi_Email EMPS/ES Review1</u> to <u>1</u>

    then Calculate <u>Current Item:wi_CummValue (before)</u> plus <u>Current Item:wi_Email EMPS/ES Review1</u> (Output to <u>Variable: c_cummv_wiEmailEMPSESReview1</u>)

    then Set <u>wi_CummValue</u> to <u>Variable: c_cummv_wiEmailEMPSESReview1</u>

    then Set <u>wi_CummValue (before)</u> to <u>Current Item:wi_CummValue</u>   ▼

    then Set <u>wt_Email EMPS/ES Review1</u> to <u>Email Notification Has Been Sent to E...</u>

then Set workflow status to <u>AVP Approved / EMPS Review</u>

then Log <u>Step 5: Initiation of creation of tas...</u> to the workflow history list

then Log <u>Step5: ElseIF (3): Ending Code: Set C...</u> to the workflow history list

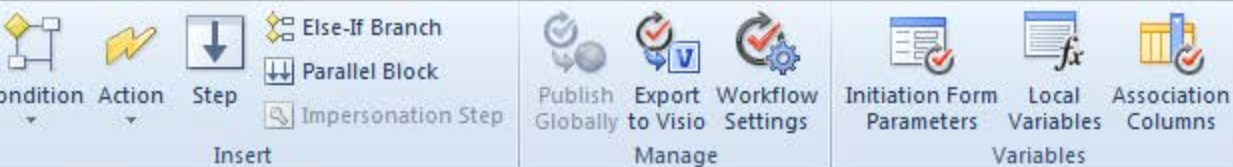then Collect <u>Assignment of Enhancement Request to ...</u> from <u>Current Item:EMPS Analyst</u> (Output to <u>Variable: Task ID for Creation of EMPS Analyst Assignment Task</u>)

then Log <u>End 'Step 5: Update Workflow for AVP ...</u> to the workflow history list

Step 6: Sister Campuses Email Notification

If <u>1</u> equals <u>2</u>

    Log <u>Begin 'Step 6: Sister Campuses Email ...</u> to the workflow history list

Condition Action Step Else-If Branch Parallel Block Impersonation Step | Publish Globally Export to Visio Workflow Settings | Initiation Form Parameters Local Variables Association Columns

Insert | Manage | Variables

Find 1 ☐ Find 2 {↔} ↺ ┇ ▾

Secondary Request Workflow_Tasks * | Primary Request Workflow

← → ▾ ⌂ EMPS ▸ Workflows ▸ Primary Request Workflow ▸ Editor ▸

then Set wt_Email Other UHS Campuses Review to Email Notification Has Been Sent to till

then Set Other UHS Campus(es) Review Status to Review is IN PROGRESS (Begin [%Curren...

then Set wi_Other UHS Review - Begin to 0.5

then Calculate Current Item:wi_CummValue (before) plus Current Item:wi_Other UHS Review - Begin (Output to Variable: c_cummv_wiOtherUHSReviewBegin)

then Set wi_CummValue to Variable: c_cummv_wiOtherUHSReviewBegin

then Set wi_CummValue (before) to Current Item:wi_CummValue

then Set wt_Other UHS Review - Begin to Other UHS Campuses Review Has Started...

then Collect 3-Day Other UHS Campuses Review from Current Item:EMPS Analyst (Output to Variable: Task ID for 72Hr Sister Campus Review)

Step 7: Sister Campuses Completion Updates, Email Notific for CM Meeting Assignment, Task Assignment

If Current Item:EMPS Review Status equals Completed

and Current Item:tmp_CM Updates (before) is empty

and Current Item:tmp_CM Updates is empty

and Current Item:wi_EMPS/ES Review 2 (Task) equals 0.5 ▾

Email Current Item:EMPS Director; EMPS/ES Assignments:Primary

then Set wi_Email CM Req Completed to 1

then Calculate Current Item:wi_CummValue (before) plus Current Item:wi_Email CM Req Completed (Output to Variable: c_cummv_wiEmailCMReqCompleted)

then Set wi_CummValue to Variable: c_cummv_wiEmailCMReqCompleted

then Set wi_CummValue (before) to Current Item:wi_CummValue

then Set wt_Email CM Req Completed to Email Notification Has Been Sent to C...

then Set tmp_CM Updates to Waiting for CM Appointment

then Collect Appoint Change Management Meeting from Current Item:EMPS Director (Output to Variable: Task ID for Appointment of Change Management Meeting)

Step 8: Change Management Meeting Scheduled

If Current Item:Request Status equals CM Meeting Scheduled

and Current Item:Request Status (before) equals Transition Tertiary Workflow - CM Mee...

then Calculate Enhancement Requests:wi_CummValue (before) plus Enhancement Requests:wi_Email EMPS/ES Review1 (Output to Variable: varC_CummV_wiEmailEMPSReview1)

then Update item in Enhancement Requests

then Log .....END TRANSFER from Primary Reques... to the workflow history list

then Log Step 3: If (3): Set Due Date, Title, ... to the workflow history list

---

If Current Item:Content Type equals Assignment of Enhancement Request to ...

and Current Item:tmp_EMPS Task Status not equals Current Item:tmp_EMPS Task Status (before)

and Current Item:tmp_EMPS Task Status equals Initiated

> Add 12 hours to Current Item:Due Date (Output to Variable: varEMPS36HrDueDt)   ▾
>
> then Set 36Hrs Post Due Date to Variable: varEMPS36HrDueDt
>
> then Set tmp_EMPS Task Status to EMPS Analyst Review 1
>
> then Create item in utilWkflwStatUpdates (Output to Variable: create2)
>
> then Set tmp_EMPS Task Status (before) to EMPS Analyst Review 1
>
> then Create item in utilWkflwStatUpdates (Output to Variable: create3)
>
> then Set workflow status to EMPS Analyst Review 1
>
> then Update item in Enhancement Requests
>
> then Log Step 3: If (4): Set 36Hrs Post Due Da... to the workflow history list
>
> then Log EMPS Analyst review workflow started. to the workflow history list

---

Step 4: Determine whether EMPS task is complete (Forwarded to sister campuses) by Due Date, Email Reminder if Not Complete

Comment: ***DELETE beginning here***

If Current Item:Content Type equals Assignment of Enhancement Request to ...

and Enhancement Requests:EMPS Review Status equals Forwarded to Other UHS Campuses

and Current Item:tmp_EMPS Task Status equals EMPS Analyst Review 1

and Current Item:Status equals Completed

Step 9: Set/Calculate Change Management Meeting Appointment Fields

If Current Item:Content Type equals Appoint Change Management Meeting

and Enhancement Requests:tmp_CM Updates (before) is empty

and Current Item:tmp_EMPS Task Status is empty

    Log Step 9: If (1): Code block started... to the workflow history list

    then Set tmp_EMPS Task Status to Waiting for CM Meeting Appointment

    then Create item in utilWkflwStatUpdates (Output to Variable: create19)

    then Set Due Date to Enhancement Requests:CM Appointment Due Date

    If Current Item:Assigned To is empty

        Set Assigned To to Enhancement Requests:EMPS Director

    then Add 12 hours to Current Item:Due Date (Output to Variable: varEMPSChgMgmt36HrsDueDt)

    then Set 36Hrs ChgMgmt Post Due Date to Variable: varEMPSChgMgmt36HrsDueDt

    then Comment: ++++++++++++++++++++++++++++++++++++...

    then Set tmp_WFItemID to Current Item:Workflow Item ID

    then Comment: ++++++++++++++++++++++++

    If 1 equals 2

        Comment: ++Not sure why I originally had the b...

        then Update item in Enhancement Requests

    then Comment: +++++++++++++++++++++++++++++++

    then Create item in utilWkflwStatUpdates (Output to Variable: create20)

    then Set tmp_EMPS Task Status (before) to Waiting for CM Meeting Appointment

    then Create item in utilWkflwStatUpdates (Output to Variable: create21)

    then Set workflow status to Waiting for CM Meeting Appointment

Step 12: Set Recommendation Updates

If Current Item:Content Type equals Provide Recommendation for Request

and Enhancement Requests:Request Status equals Recommendation Pending

and Enhancement Requests:Request Status (before) equals CM Meeting Scheduled

and Current Item:tmp_EMPS Task Status (before) is empty

> Log Step 12: If (1): Code block started... to the workflow history list
>
> then Set Due Date to Enhancement Requests:Recommendation Due Date
>
> then Set tmp_EMPS Task Status to Waiting for Recommendation
>
> If Current Item:Assigned To is empty
>
> > Set Assigned To to Enhancement Requests:EMPS Director
>
> then Add 12 hours to Current Item:Due Date (Output to Variable: varRecommendation36HrsDueDt)
>
> then Set 36Hrs Post Due Date to Variable: varRecommendation36HrsDueDt
>
> then Set tmp_EMPS Task Status (before) to Waiting for Recommendation
>
> then Set workflow status to Waiting for Recommendation
>
> then Log .....BEGIN TRANSFER from Primary Requ... to the workflow history list
>
> then Log Step12: Email initiating to the workflow history list
>
> then Email Variable: varEMPSDir
>
> then Update item in Enhancement Requests
>
> then Log Step12: Email notification for provid... to the workflow history list
>
> then Log .....END TRANSFER from Primary Reques... to the workflow history list
>
> then Log Waiting on Recommendation to be provi... to the workflow history list
>
> then Log Step 12: If (1): Code block completed... to the workflow history list

Step 13: Determine whether Recommendation is complete by Due Date, Email Reminder if Not Complete

juest Workflow | Tertiary Request Wflow...d Other UHS Campuses | Tertiary Request Wflow... UHS Campuses Review | Tertiary Request Wflow3 - Schedule CM Meetng | Tertiary Request Wflow...ovide Recommendation

EMPS ▸ Workflows ▸ Secondary Request Workflow_Tasks ▸ Editor ▸

Set tmp_EMPS Task Status to Waiting for Recommendation (36Hrs)

then Email Current Item:Assigned To

then Log Waiting for Recommendation (36Hrs) to the workflow history list

then Set workflow status to Waiting for Recommendation (36Hrs)

then Stop the workflow and log Waiting for Recommendation (36Hrs)

then Log Step 14: If (1): Code block completed... to the workflow history list

If Current Item:Content Type equals Provide Recommendation for Request

and Current Item:tmp_EMPS Task Status equals Waiting for Recommendation (36Hrs)

and Current Item:Status equals In Progress

Log Step 14: If (2): Code block started... to the workflow history list

If Current Item:tmp_Reminder_Counter (before) is less than 2

Set tmp_Reminder_Counter (before) to 2

then Pause for 0 days, 24 hours, 0 minutes

then Calculate Current Item:tmp_Reminder_Counter (before) plus 1 (Output to Variable: varReminderCounter4)

then Set tmp_Reminder_Counter to Variable: varReminderCounter4

then Set tmp_Reminder_Counter (before) to Variable: varReminderCounter4

If Current Item:Status equals In Progress

Email Current Item:Assigned To; Enhancement Requests:tmpPrimaryAssignment2; Enhancement Requests:tmpSecondaryAssignment2

then Log Step 14: If (2): Code block completed... to the workflow history list

Step xx: Set Document Preparation Updates

or Current Item:Request Status equals Recommendation Completed

or Current Item:AVP or Designee Approval Status equals Not Approved

  | Stop the workflow and log End workflow

Step 1: Transition Workflow where Status is Updated to Forwarded for Sister Campus Review

If 1 equals 2

  | Log Begin 'Step 1: Transition Workflow wh... to the workflow history list

  | then Wait for EMPS Review Status to equal Forwarded to Other UHS Campuses

then Wait for wi_CummValue to equal 7

then Log Begin 'Step 1: Transition Workflow wh... to the workflow history list

then Log Step 1: Wait for ERS to equal "Forwar... to the workflow history list

If Current Item:EMPS Review Status (before) not equals Current Item:EMPS Review Status

  | Set Request Status (before) to Transition Tertiary Workflow - Other ...

  | then Set 72Hr Begin Date to Current Item:Modified

  | then Add 72 hours to Current Item:Modified (Output to Variable: var72HrEndDate) ▼

  | then Set 72Hr End Date to Variable: var72HrEndDate

  | then Set Request Status to Other UHS Campuses Review

  | then Set workflow status to Other UHS Campuses Review

  | then Set EMPS Review Status (before) to Current Item:EMPS Review Status

  | then Log Step1: IF(1): Set RS (b4), 72HrBeginD... to the workflow history list

  | then Comment: ***update task date completed was her...

then Log End 'Step 1: Transition Workflow wher... to the workflow history list

Step 1A: Set Notification Users

Primary Request Workflow | Tertiary Request Wflow...d Other UHS Campuses | Tertiary Request Wflow...HS Campuses Review *

EMPS ▶ Workflows ▶ Tertiary Request Wflow2 - 3Day Other UHS Campuses Review ▶ Editor ▶

or Current Item:wi_CummValue is greater than 11

or Current Item:wi_CummValue is less than or equal to 8

or Current Item:Request Status equals Recommendation Completed

or Current Item:AVP or Designee Approval Status equals Not Approved

    Stop the workflow and log End workflow

Step 1: Transition Workflow where EMPS Review Status is Updated to Completed

If 1 equals 2

    Wait for EMPS Review Status to equal Completed

then Wait for wi_CummValue to equal 11

then Log Begin 'Step 1: Transition Workflow wh... to the workflow history list

If Current Item:EMPS Review Status (before) not equals Current Item:EMPS Review Status

    Set Request Status (before) to Transition Tertiary Workflow - CM Mee...

    then Add 24 hours to Current Item:Modified (Output to Variable: var24HrCMAppointmentDueDate)

    then Set CM Appointment Due Date to Variable: var24HrCMAppointmentDueDate

    then Set Request Status to Pending CM Appointment

    then Set workflow status to Pending CM Appointment

    then Set EMPS Review Status (before) to Current Item:EMPS Review Status

then Log End 'Step 1: Transition Workflow wher... to the workflow history list

Step 2: Sister Campuses Completion Updates, Email Notific for CM Meeting Assignment, Task Assignment

Log Begin 'Step 2: Sister Campuses Comple... to the workflow history list

then Set Variable: varAttendee_TechMgr to _

Else

    Set tmp_uFld3_CM_TechMgr to [%Current Item:Technical Manager(s)%];

    then Set Variable: varAttendee_TechMgr to Current Item:Technical Manager(s)

then Log End 'Step 1A: Set Notification Users' to the workflow history list

Step 2: Change Management Meeting Scheduled

Log Begin 'Step 2: Change Management Meet...' to the workflow history list

If Current Item:Request Status equals CM Meeting Scheduled

and Current Item:Request Status (before) equals Transition Tertiary Workflow - CM Mee...

    Set Request Status (before) to Current Item:Request Status

    then Add 1 hours to Current Item:CM Review Meeting Date/Time (Output to Variable: varCMReviewMeetingEnd)

    then Log Calc varCMReviewMeetingEnd to the workflow history list

    then Add -24 hours to Current Item:CM Review Meeting Date/Time (Output to Variable: varCMReviewMtgReminder)

    then Log Calc varCMReviewMtgReminder to the workflow history list

    then Log Initiating creation of calendar item to the workflow history list

    then Create item in Calendar (Output to Variable: Task ID for Creating CM Calendar Entry)

    then Log Calendar item created to the workflow history list

    If Current Item:Requesting Campus equals UHCL

        Set Variable: varApprvlUHCL to [%Current Item:AVP or Designee Approv...

    Else

        Set Variable: varApprvlUHCL to [%Current Item:UHCL AVP(s) or Designe...

    then Log varApprvlUHCL completed to the workflow history list

Primary Request Workflow | Tertiary Request Wflow...d Other UHS Campuses | Tertiary Request Wflow... UHS Campuses Review | Tertiary Request Wflow

EMPS ▶ Workflows ▶ Tertiary Request Wflow3 - Schedule CM Meetng ▶ Editor ▶

then Set <u>Variable: varAttendee_TechMgr</u> to _

Else

    Set <u>tmp_uFld3_CM_TechMgr</u> to <u>[%Current Item:Technical Manager(s)%];</u>

    then Set <u>Variable: varAttendee_TechMgr</u> to <u>Current Item:Technical Manager(s)</u>

then Log <u>End 'Step 1A: Set Notification Users'</u> to the workflow history list

Step 2: Change Management Meeting Scheduled

Log <u>Begin 'Step 2: Change Management Meet...</u> to the workflow history list

If <u>Current Item:Request Status</u> <u>equals</u> <u>CM Meeting Scheduled</u>

and <u>Current Item:Request Status (before)</u> <u>equals</u> <u>Transition Tertiary Workflow - CM Mee...</u>

    Set <u>Request Status (before)</u> to <u>Current Item:Request Status</u>

    then Add <u>1</u> hours to <u>Current Item:CM Review Meeting Date/Time</u> (Output to <u>Variable: varCMReviewMeetingEnd</u>)

    then Log <u>Calc varCMReviewMeetingEnd</u> to the workflow history list

    then Add <u>-24</u> hours to <u>Current Item:CM Review Meeting Date/Time</u> (Output to <u>Variable: varCMReviewMtgReminder</u>)

    then Log <u>Calc varCMReviewMtgReminder</u> to the workflow history list

    then Log <u>Initiating creation of calendar item</u> to the workflow history list

    then Create item in <u>Calendar</u> (Output to <u>Variable: Task ID for Creating CM Calendar Entry</u>)

    then Log <u>Calendar item created</u> to the workflow history list

    If <u>Current Item:Requesting Campus</u> <u>equals</u> <u>UHCL</u>

        Set <u>Variable: varApprvlUHCL</u> to <u>[%Current Item:AVP or Designee Approv...</u>

    Else

        Set <u>Variable: varApprvlUHCL</u> to <u>[%Current Item:UHCL AVP(s) or Designe...</u>

    then Log <u>varApprvlUHCL completed</u> to the workflow history list

| Primary Request Workflow | Tertiary Request Wflow...d Other UHS Campuses | Tertiary Request Wflow... UHS Campuses Review | Tertiary Requ... |

← → ▾ 🏠 EMPS ▸ Workflows ▸ Tertiary Request Wflow3 - Schedule CM Meetng ▸ Editor ▸

Log Begin set varEmail1_To to the workflow history list

then Set Variable: varEmail1_To to [%Current Item:tmp_uFld3_CM_EMPSAnaly...

then Log Initiating email to the workflow history list

then Email Variable: varEmail1_To

Else if Current Item:Review Type equals For Formal Review

    Set Variable: varEmail2_To to [%Current Item:tmp_uFld3_CM_Presenter...

    then Set Variable: varEmail2_Cc to [%Current Item:tmp_uFld_RC_AVP%]; [%C...

    then Log Initiating email to the workflow history list

    then Email Variable: varEmail2_To

then Set wi_Email Scheduled Meeting to 1

then Calculate Current Item:wi_CummValue (before) plus 1 (Output to Variable: c_cummv_wiEmailSchduledMtg)

then Set wi_CummValue to Variable: c_cummv_wiEmailSchduledMtg

then Set wi_CummValue (before) to Variable: c_cummv_wiEmailSchduledMtg

then Set wt_Email Scheduled Meeting to Email Notification Has Been Sent to A...

then Add 10 minutes to Current Item:CM Review Meeting Date/Time (Output to Variable: varRecommendationDueDate)

then Set Recommendation Due Date to Variable: varRecommendationDueDate

If 1 equals 2

    Comment: See original Primary Request wflow, S...

then Set Request Status to Recommendation Pending

then Set tmp_CM Updates to Recommendation Pending

then Collect Provide Recommendation for Request from Current Item:EMPS Director (Output to Variable: Task ID for Recommendation)

then Log End 'Step 2: Change Management Meetin... to the workflow history list

then Stop the workflow and log Workflow Ended

Fields

Drag a field to add it to the form.

Insert a Field:

- 📝 UHM Campus Comments
- 📝 UHV Campus Comments
- 📅 CM Review Meeting Date/Tim
- 🔀 Request Presenter
- 🔀 EMPS Director
- 🔀 ES Director(s)
- 🔀 Campus Functional Analyst(s)
- 🔀 Campus/ES Developer(s)
- 🔀 Campus Lead(s)_
- 🔀 Technical Manager(s)
- 🔀 EMPS Analyst(s)
- 📇 EMPS Director Review Status
- 📇 ES Director(s) Review Status
- 📇 Campus Functional Analyst(s)
- 📇 Campus/ES Developer(s) Rev
- 📇 Campus Lead(s)_ Review Sta
- 📇 Technical Manager(s) Review
- 📇 EMPS Analyst(s) Review Statu

Rules

Value

- 📝 Hide control in display view
- 🔁 **Update tmp_Desc_Recommendation**

☀ New ▼

Details for:
Update tmp_Desc_Recommendation

Condition:
None - Rule runs when field ch...

Rule type:
Action

Run these actions: *   Add ▼

Set a field's value: tmp_Recom_H...

☐ Don't run remaining rules if
the condition of this rule is met

Rule Details

Action:

📇 Set a field's value ▼

Field:

tmp_Recom_Holding   📇

Value:

. f_x

OK   Cancel

Define E-mail Message

To: Current Item:EMPS Analyst

CC: Current Item:ES Manager

Subject: Notification of Enhancement Request [%Current Item:Request Number%]: [%Current Ite

Tahoma | 10 | **B** *I* <u>U</u> | ■ Automatic

An enhancement request for business area [%Current Item:Business Area%] has been submitted by [%Current Item:Created By%] and approved by [%Current Item:AVP(s) or Designee(s)%]. The request has been assigned to you for EMPS/ES review. Please review the request and update the SharePoint item accordingly. Please ensure the request is forwarded for sister campus(es) review within the next 24 hours.

Request

[%Current Item:Request Number%]: [%Current Item:Enhancement Request Title%]

Add or Change Lookup   OK   Cancel

wi_Doc Preparation	1	1
wi_Doc Submission	1	2
wi_Email Requesting Reviewers	1	3
wi_AVP Apprv/Disapprv	1	4
wi_Email AVP Apprv/Disapprv	1	5
wi_Disapprv - Wkflw Ended		5
wi_Email EMPS/ES Review1	1	6
wi_EMPS/ES Review 1 (Rqst)	0.5	6.5
wi_EMPS/ES Review 1 (Task)	0.5	7
wi_Email Other UHS Campuses Review	1	8
wi_Other UHS Review - Begin	0.5	8.5
wi_Other UHS Review - End	0.5	9
wi_Email EMPS Analyst Review2	1	10
wi_EMPS/ES Review 2 (Rqst)	0.5	10.5
wi_EMPS/ES Review 2 (Task)	0.5	11
wi_Email CM Req Completed	1	12
wi_Meeting Scheduled (Rqst)	0.5	12.5
wi_Meeting Scheduled (Task)	0.5	13
wi_Email Scheduled Meeting	1	14
wi_Recommendation (Rqst)	0.5	14.5
wi_Recommendation (Task)	0.5	15
wi_Email Recom Completed	1	16
wi_Recom Completed - Wkflw Ended		16
wi_CummValue	16	32

#	Label	X/C/I			Name	old	rev	FINAL
1								
2	Request Cancelled:	X			`Cancellled			=IF([Request Status]="Request Cancelled","X","")
3	Doc Submision	C	I		`Submitted			=IF([wi_Doc Submission]=1,"C",IF([Request Status]<>"Request Cancelled","I",""))
4	Requesting Campus Apprvl	I	A	N	`Request Approval	=IF([AVP o	'=IF([AVP o	=IF([AVP or Designee Approval Status]="Approved","A",IF([AVP or Designee Appro...
5	EMPS/ES Cursory Review	C	I		`EMPS Review	=IF([wi_EN	'=IF([wi_EI	=IF([wi_EMPS/ES Review 1 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=6,[wi_EMPS/ES...
5	Other UHS Campuses Review-Begin	C	I		`Campuses Review-Begin	=IF([wi_Ot	'=IF([wi_O	=IF([wi_Other UHS Review - Begin]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other...
6	Review-UHCL	I	A	N	`Review-UHCL	=IF(AND(A	'=IF(AND(A	=IF(AND(ApprvlStatus_UHCL="Not Reviewed",NOT(ISBLANK(ApprvlName_UHCL))),...
6.5	Review-UhD	I	A	N	`Review-UHD	=IF(AND(A	'=IF(AND(A	=IF(AND(ApprvlStatus_UHD="Not Reviewed",NOT(ISBLANK(ApprvlName_UHD))),"I...
7	Review-UHM	I	A	N	`Review-UHM	=IF(AND(A	=IF(AND(A	=IF(AND(ApprvlStatus_UHM="Not Reviewed",NOT(ISBLANK(ApprvlName_UHM))),'...
8	Review-UHV	I	A	N	`Review-UHV	=IF(AND(A	=IF(AND(A	=IF(AND(ApprvlStatus_UHV="Not Reviewed",NOT(ISBLANK(ApprvlName_UHV))),"I...
8.5	Other UHS Campuses Review-End	C	I		`Campuses Review-End	=IF([wi_Ot	=IF([wi_Ot	=IF([wi_Other UHS Review - End]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other U...
9	EMPS Final Review	C	I		`EMPS Review-Final	=IF([wi_EN	=IF([wi_EI	=IF([wi_EMPS/ES Review 2 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=10,[wi_EMPS/E...
10	CM Review Scheduled	C	I		`CM Mtg Scheduled	=IF([wi_M	=IF([wi_M	=IF([wi_Meeting Scheduled (Rqst)]=0.5,"C",IF(AND(wi_CummValue=12,[wi_Meetin...
10.5	Recommendation Provided	C	I		`Recommendation	=IF([wi_Re	'=IF([wi_R	=IF([wi_Recommendation (Rqst)]=0.5,"C",IF(AND(wi_CummValue=14,[wi_Recomm...
12								
12.5								
13								
14								
14.5								
15								
16								
16								

Box 1:
```
=IF([AVP or Designee Approval Status]="Approved","A",IF([AVP or Designee Approval Status]="Not Approved","N",IF(AND(wi_CummValue=3,[wi_AVP Apprv/Disapprv]<>1),"I","")))
```

Box 2 (red):
```
=IF([AVP or Designee Approval Status]="Approved","A",IF([AVP or Designee Approval Status]="Not Approved","N",IF(AND(wi_CummValue=3,[wi_AVP Apprv/Disapprv]<>1),"I",IF(AND(wi_CummValue<4,[Request Status]<>"Request Cancelled"),"I",""))))
```

Box 3:
```
=IF([wi_EMPS/ES Review 1 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=6,[wi_EMPS/ES Review 1 (Rqst)]<>0.5),"I",""))
```

Box 4 (red):
```
=IF([wi_EMPS/ES Review 1 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=6,[wi_EMPS/ES Review 1 (Rqst)]<>0.5),"I",IF(AND(wi_CummValue<4,[Request Status]<>"Request Cancelled"),"I","")))
```

Box 5:
```
=IF([wi_Other UHS Review - Begin]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other UHS Review - Begin]<>0.5),"I",""))
```

Box 6 (red):
```
=IF([wi_Other UHS Review - Begin]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other UHS Review - Begin]<>0.5),"I",IF(AND(wi_CummValue<8.5,[Request Status]<>"Request Cancelled"),"I","")))
```

Box 7:
```
=IF(AND(ApprvlStatus_UHCL="Not Reviewed",NOT(ISBLANK(ApprvlName_UHCL))),"I",IF(ApprvlStatus_UHCL="Approved","A",IF(ApprvlStatus_UHCL="Not Approved","N","")))
```

Box 8 (red):
```
=IF(AND(ApprvlStatus_UHCL="Not Reviewed",NOT(ISBLANK(ApprvlName_UHCL))),"I",IF(ApprvlStatus_UHCL="Approved","A",IF(ApprvlStatus_UHCL="Not Approved","N",IF(AND([wi_Other UHS Review - Begin]<>0.5,[Request
```

```
=IF(AND(ApprvlStatus_UHD="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHD))),"I",IF(ApprvlStatus_UHD="Approved","A",IF(ApprvlStat
us_UHD="Not Approved","N","")))
```

```
=IF(AND(ApprvlStatus_UHD="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHD))),"I",IF(ApprvlStatus_UHD="Approved","A",IF(ApprvlStat
us_UHD="Not Approved","N",IF(AND([wi_Other UHS Review - Begin]<>0.5,[Request
```

```
=IF(AND(ApprvlStatus_UHM="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHM))),"I",IF(ApprvlStatus_UHM="Approved","A",IF(ApprvlSta
tus_UHM="Not Approved","N","")))
```

```
=IF(AND(ApprvlStatus_UHM="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHM))),"I",IF(ApprvlStatus_UHM="Approved","A",IF(ApprvlSta
tus_UHM="Not Approved","N",IF(AND([wi_Other UHS Review - Begin]<>0.5,[Request
```

```
=IF(AND(ApprvlStatus_UHV="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHV))),"I",IF(ApprvlStatus_UHV="Approved","A",IF(ApprvlStat
us_UHV="Not Approved","N","")))
```

```
=IF(AND(ApprvlStatus_UHV="Not
Reviewed",NOT(ISBLANK(ApprvlName_UHV))),"I",IF(ApprvlStatus_UHV="Approved","A",IF(ApprvlStat
us_UHV="Not Approved","N",IF(AND([wi_Other UHS Review - Begin]<>0.5,[Request
```

```
=IF([wi_Other UHS Review - End]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other UHS Review -
End]<>0.5),"I",""))
```

```
=IF([wi_Other UHS Review - End]=0.5,"C",IF(AND(wi_CummValue=8.5,[wi_Other UHS Review -
End]<>0.5),"I",IF(AND(wi_CummValue<9,[Request Status]<>"Request Cancelled"),"I","")))
```

```
=IF([wi_EMPS/ES Review 2 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=10,[wi_EMPS/ES Review 2
(Rqst)]<>0.5),"I",""))
```

```
=IF([wi_EMPS/ES Review 2 (Rqst)]=0.5,"C",IF(AND(wi_CummValue=10,[wi_EMPS/ES Review 2
(Rqst)]<>0.5),"I",IF(AND(wi_CummValue<11,[Request Status]<>"Request Cancelled"),"I","")))
```

```
=IF([wi_Meeting Scheduled (Rqst)]=0.5,"C",IF(AND(wi_CummValue=12,[wi_Meeting Scheduled
(Rqst)]<>0.5),"I",""))
```

```
=IF([wi_Meeting Scheduled (Rqst)]=0.5,"C",IF(AND(wi_CummValue=12,[wi_Meeting Scheduled
(Rqst)]<>0.5),"I",IF(AND(wi_CummValue<13,[Request Status]<>"Request Cancelled"),"I","")))
```

```
=IF([wi_Recommendation (Rqst)]=0.5,"C",IF(AND(wi_CummValue=14,[wi_Recommendation
(Rqst)]<>0.5),"I",""))
```

```
=IF([wi_Recommendation (Rqst)]=0.5,"C",IF(AND(wi_CummValue=14,[wi_Recommendation
(Rqst)]<>0.5),"I",IF(AND(wi_CummValue<15,[Request Status]<>"Request Cancelled"),"I","")))
```

SUMMARY WORKSTEPS

	Participant/Role		
1	Requestor	Initiate Request {**Digital Document**}	Requestor initiates the digital enhancement request .
2	Requestor	Submit for Approval or Cancel Request {**Digital Document**}	Requestor either completes the required initial documentation or cancels the request. After completing the initial documentation, the requestor updates the status of the request for submission to the Requesting Campus Reviewers and approval/disapproval by the AVP/Designee. If the request is cancelled, the process and workflow terminates. If the request is submitted for review and AVP/Designee approval, an email notification is sent to the Requesting Campus Reviewers informing them of the request, and their needed review and update of the digital document.
	Workflow/Requestor	IF: If Cancelled, Process and Workflow Terminates	
	Workflow/Requestor	IF: If Submitted for AVP Approval, Email Notification sent to Requesting Campus Reviewers	
3	Requesting Campus Reviewers	Review Request {**Digital Document**}	Requesting Campus Reviewers review the enhancement request and make a determination if the request should be approved.
4	Requesting Campus Reviewers	Update Review Statuses...{**Decision-Data Gateway**} AVP/Designee Approve or Deny Request?	Requesting Reviewers update the appropriate statuses of the request. An email notification is sent to the Requestor and identified Requesting Campus Reviewers informing of the updated Approval/Disapproval status of the AVP/Designee. If the AVP/Designee does not approve the request, the process and workflow terminates. If the AVP/Designee approves the request, an email notification is sent to the EMPS Analyst and ES Technical Manager informing them of the AVP/Designee approved
	Workflow/Requestor	Email Notification sent to Requesting Campus Reviewers Informing of Approval/Deny Decision	
	Workflow/Requestor	IF: If Not Approved, Process and Workflow Terminates	
	Workflow/EMPS	IF: If Approved, Email Notification Sent to EMPS/ES	
5	EMPS	Review and Forward Request... {**Digital Document**}...{**Text Artifact**: "EMPS Must Both (a) Update Request Status and (b) Update Task Status"}	EMPS Analyst performs a cursory review of the request, then updates the xxxxxxxx status to "Forwarded to Other UHS Campuses" and updates the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Analyst. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished. The ES Technical Manager performs a cursory review and updates cursory technical information such as the potential assigned developer and estimated development hours.
	Workflow	{Timer} 24Hr timer	
	Workflow/EMPS	{**Decision - ~~Event~~ Data Gateway**} Forward Request Completed?	
	Workflow/EMPS	IF: If EMPS has not completed the workstep/task, a Reminder is Emailed...{**Loops**}...{**Text Artifact**: "Tasks Not Completed After the Second Reminder Are Escalated"}	
6	Workflow/Other Campuses	Email Notification sent to Other UHS Campuses Reviewers	Once the request has completed the "Forward to Other UHS Campuses" activity, an email notification is sent to all of the impacted Other UHS Campuses Reviewers informing them of the enhancement
7	Other Campuses	Review Request and Update Document {**Digital Document**}	The impacted Other UHS Campuses (non-initating campuses) reviews the enhancement request, and each campus' AVP/Designee and involved reviewers updates the digital document with their appropriate review/approval statuses. The Other UHS Campuses have an allotted three days to update the online document with their approval/review statuses.
	Workflow	{Timer} 3Day pause	
8	Workflow/EMPS	Email Notification sent to EMPS Informing of 3-Day Expiration	Workflow sends an email notification to the EMPS Analyst informing of the expiration of the 3-Day Other UHS Campuses review.

9	**EMPS**	**Complete Request…{Digital Document}…{Text Artifact: "EMPS Must Both (a) Update Request Status and (b) Update Task Status"}**	EMPS Analyst completes the request by updating the xxxxxxx status to "Complete", and updates the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Analyst. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished.
	Workflow	{Timer} 24Hr timer	
	Workflow/EMPS	{Decision - Event Data Gateway} EMPS Update Completed?	
	Workflow/EMPS	IF: If EMPS has not completed the workstep/task, a Reminder is Emailed…{Loops}…{Text Artifact: "Tasks Not Completed After the Second Reminder Are Escalated"}	
10	**Change Management**	**Email Notification sent to Change Management Informing of Completed Request**	Workflow sends an email notification to Change Management informing of the completion of final reviews and documentation preparation, and that a change management meeting needs to be
11	**Change Management**	**Schedule Change Management Meeting... {Digital Document}**	Change Management updates the request with the date/time the change management review meeting will be conducted, and updates the associated Task as "Completed". If the request Review Type is "For Documentation Purposes Only", an email notification informing of the scheduled change management meeting is sent to EMPS/ES and Change Management. However, if the request Review Type is "For Formal Review", an email notification informing of the scheduled change management meeting is sent to Requesting Campus Reviewers, Other UHS Campuses Reviewers, EMPS/ES, and Change Management. If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Program Manager and EMPS Executive Director. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished.
	Workflow	{Timer} 24Hr timer	
	Workflow/ChgMgmt	{Decision - Event Data Gateway} EMPS Update Completed?	
	Workflow/ChgMgmt	IF: If EMPS has not completed the workstep/task, a Reminder is Emailed…{Loops}…{Text Artifact: "Tasks Not Completed After the Second Reminder Are Escalated"}	
	Workflow/ChgMgmt	{Decision -Data Gateway} Meeting Review Type?	
	Workflow/EMPSES	IF: If Meeting Review Type is "For Documentation Purposes Only", Email Notification Sent to EMPS/ES and Change Management	
	Workflow/All Roles	IF: If Meeting Review Type is "For Formal Review", Email Notification Sent to Requesting Campus Reviewers, Other UHS Campuses Reviewers, EMPS/ES, and Change Management	
12	**Change Management**	**Conduct Meeting and Provide Recommendation... {Digital Document}**	A meeting is conducted to discuss the enhancement request. Change Management follows up the meeting by updating the request with a "Recommendation", and updating the associated Task as "Completed". If the workstep is not completed within 24 hours, a reminder is emailed to the EMPS Executive Director and Program Manager. Worksteps not completed after the second reminder are escalated, and loops through every 24 hours until finished. Once the Recommendation workstep is completed, an email notification is sent to all participants on the request informing of the Recommendation provided; the process and workflow terminates.
	Workflow	{Timer} 24Hr timer	
	Workflow/ChgMgmt	{Decision - Event Data Gateway} Chg Mgmt Update Completed?	
	Workflow/ChgMgmt	IF: If CM has not completed the workstep/task, a Reminder is Emailed…{Loops}…{Text Artifact: "Tasks Not Completed After the Second Reminder Are Escalated"}	
	Workflow/All Roles	Email Notification Sent to Requesting Campus Reviewers, Other UHS Campuses Reviewers, EMPS/ES, and Change Management	

1. SUMMARY PROCESS STEPS
   1. Requestor initiates request in Sharepoint
   2. Requestor saves system document
   3. **WORKFLOW** updates field 'Request Status', 'Campus Functional Analyst_(CM)', 'Campus Developer_(CM)', 'Campus Presenter'
   4. **WORKFLOW** sends email notification to Requesting Campus Reviewers:
   5. Appropriate requesting campus reviewers update their 'Review Status' fields
   6. Requesting campus AVP/Designee updates their 'Approval Status' fields and saves changes
   7. **WORKFLOW** updates field 'Request Status'
   8. **WORKFLOW** sends email notification to EMPS/ES for Approved requests:
   9. EMPS analyst updates their 'EMPS Review Status' fields (and updates Section 1 items as appropriate) and saves changes; ES managers updates their 'ES Review Status' fields and save changes
   10. **WORKFLOW** sends email notification to Sister Campuses Reviewers identified in 9-b-iv above where populated once EMPS updates field 'EMPS Review Status' to "Forwarded for Sister Campuses Review" and saves status
   11. **WORKFLOW** updates field 'Request Status'; 72-Hour review period begins (another hidden field also updated???) and updates field 'CM ES Developer'
   12. Appropriate sister campuses reviewers update their 'Review Status' fields and AVP/Designees update their 'Approval Status' fields
   13. **WORKFLOW** updates field 'Request Status' and field 'EMPS Review Status' at end of 72-Hour review period
   14. **WORKFLOW** sends email notification to EMPS for Post 72-Hr review and update:
   15. EMPS analyst reviews request for completeness and updates 'EMPS Review Status' field to completed (and updates Section 1 and Section 2 items as appropriate) and saves changes
   16. **WORKFLOW** sends email notification to Change Management reviewers
   17. Change management EMPS/ES Director assigns 'CM Review Date/Time' for request item
   18. **WORKFLOW** sends email notification to Change Management reviewers from #16 above of the meeting date/time (phone bridge# nnn-nnn-nnnn, pin# nnn)
   19. CM Reviewers conduct meeting
   20. CM Reviewers update their prospective 'Review Status' fields to value "Reviewed"
   21. CM Team updates 'Reviewers Recommendations (Completed by Change Management Team)', 'Support for Change Management Team's Recommendation', and 'Recommended Enhancements' fields
   22. **WORKFLOW** sends email notification of Recommendation Status to parties of interest
   23. EMPS analyst updates 'CSR Number' field if development work needed based on recommendation

2. DETAILED PROCESS STEPS
1. Requestor initiates request in Sharepoint
   1. **Fields populated by Requestor:**
      i.   Enhancement Request Title [Section 1]
      ii. Business Area [Section 1]
           1. Academic Advising | Admissions | Campus Community | Financial Aid | Reporting | Security | SEVIS | Student Financials | Student Records | Student Recruiting *{single selection}*
      iii. Requesting Campus [Section 1]
           1. UH | UHCL | UHV | UHD *{single selection}*
      iv. Date Desired in Production [Section 1]
      v.   Enhancement Type 1 [Section 1]
           1. Administrative | Self-Service *{multiple selection}*
      vi. Enhancement Type 2 [Section 1]
           1. Federal | State | Institutional *{single selection}*
      vii. Enhancement Category [Section 1]
           1. Preventative | Corrective | Expansion *{multiple selection}*
      viii. Developer Resources to be Used [Section 1]

1. UHS Developer | Campus Developer *{single selection}*
    ix. Description of Request [Section 1]
    x. Current Business Practice [Section 1]
    xi. Delivered Campus Solutions Functionality [Section 1]
    xii. Description of Requested Enhancement [Section 1]
    xiii. University Community Affected by the Proposed Enhancement [Section 1]
    xiv. Benefit(s) of Proposed Ehancement (Also specify…..) [Section 1]
    xv. Risk/Impact of not performing the Proposed Enhancement [Section 1]
    xvi. Potential Cost Saving [Section 1]
    xvii. Proposed Enhancement and Alternatives [*label;* Section 1]
        1. Option 1: [Section 1]
        2. Option 1: Proposed Enhancement and Alternative [Section 1]
        3. Option 1: Estimated Manual Hours [Section 1]
        4. Option 1: Number of Students Affected [Section 1]
        5. Option 1: Number of Administrative Users Affected [Section 1]
        6. Option 2: [Section 1]
        7. Option 2: Proposed Enhancement and Alternative [Section 1]
        8. Option 2: Estimated Manual Hours [Section 1]
        9. Option 2: Number of Students Affected [Section 1]
        10. Option 2: Number of Administrative Users Affected [Section 1]
        11. Option 3: [Section 1]
        12. Option 3: Proposed Enhancement and Alternative [Section 1]
        13. Option 3: Estimated Manual Hours [Section 1]
        14. Option 3: Number of Students Affected [Section 1]
        15. Option 3: Number of Administrative Users Affected [Section 1]
        16. Upcoming Oracle Improvements: [Section 1]
        17. Upcoming Oracle Improvements: Proposed Enhancement and Alternative [Section 1]
        18. Upcoming Oracle Improvements: Estimated Manual Hours [Section 1]
        19. Upcoming Oracle Improvements: Number of Students Affected [Section 1]
        20. Upcoming Oracle Improvements: Number of Administrative Users Affected [Section 1]
    xviii. Requesting Campus Review [*label;* Section 1]
        1. Request Presented By [Section 1]
        2. Business Owner [Section 1]
        3. Business Owner Review Status [Section 1]
            a. Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}*
        4. Campus Functional Analyst [Section 1]
        5. Campus Functional Analyst Review Status [Section 1]
            a. Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}*
        6. Campus Developer (if to be assigned) [Section 1]
        7. Campus Developer Review Status [Section 1]
            a. Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}*
        8. Campus Lead [Section 1]
        9. Campus Lead Review Status [Section 1]
            a. Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}*
        10. AVP or Designee [Section 1]
        11. AVP/Designee Approval Status [Section 1]
            a. Not Reviewed | Approved | Not Approved *{single selection- default 'Not Reviewed'}*
        12. Requesting Campus Review Status [Section 1]
            a. Document Preparation | Submitted for AVP Approval | Request Cancelled *{default is 'Document Preparation'}*
        13. Requesting Campus Comments [Section 1]
2. <u>Fields populated automatically:</u>
    i. Created By [Section 1]

      ii.   **Date Created [Section 1]**

      iii.   **ID Number [internal system document number]**

      iv.   **Request Number [Section 5] = "CMR" & left pad (ID Number, 0, 4)**

2. **Requestor saves system document**

3. **WORKFLOW updates field 'Request Status', 'Campus Functional Analyst_(CM)', 'Campus Developer_(CM)', 'Campus Presenter'**

    1.   <u>**Fields populated automatically:**</u>

      i.   **Request Status [Section 5] = "Initiated" where Requesting Campus Review Status is "Document Preparation"**

      ii.   **Request Status [Section 5] = "Requesting Campus Review" where RCRS field is "Submitted for AVP Approval"**

      iii.   **Request Status [Section 5] = "Cancelled" where RCRS field is "Request Cancelled"**

      iv.   **Presenter (Initiating Campus) [Section 3] = field 'Request Presented By' in Section 1**

      v.   **Functional Analyst (Initiating Campus) [Section 3] = field 'Campus Functional Analyst' in Section 1**

      vi.   **Developer (if to be assigned, Initiating Campus) [Section 3] = field 'Campus Developer' in Section 1**

      vii.   **EMPS Analyst_(CM) [Section 3] = *"Analyst per the Workflow Analyst Lookup table"***

      viii.   **Campus Lead [*UHCL/UHM/UHV/UHD*] [Section 3] = field 'Campus Lead' in Section 1 based on logic using 'Requesting Campus' field from Section 1**

4. **WORKFLOW sends email notification to Requesting Campus Reviewers:**

    1.   **Business Owner of requesting campus (based on field 'Business Owner')**

    2.   **Campus Functional Analyst of requesting campus ('"'")**

    3.   **Campus Developer of requesting campus ('"'")**

    4.   **Campus Lead of requesting campus ('"'")**

    5.   **AVP/Designee of requesting campus ('"'")**

5. **Appropriate requesting campus reviewers update their 'Review Status' fields**

    1.   <u>**Fields populated by Reviewers:**</u>

      i.   **Requesting Campus Review [*label;* Section 1]**

        1.   Request Presented By [Section 1]

        2.   Business Owner [Section 1]

        3.   **Business Owner Review Status [Section 1]**

          a.   **Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}***

        4.   Campus Functional Analyst [Section 1]

        5.   **Campus Functional Analyst Review Status [Section 1]**

          a.   **Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}***

        6.   Campus Developer (if to be assigned) [Section 1]

        7.   **Campus Developer Review Status [Section 1]**

          a.   **Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}***

        8.   Campus Lead [Section 1]

        9.   **Campus Lead Review Status [Section 1]**

          a.   **Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}***

        10.   AVP or Designee [Section 1]

        11.   AVP/Designee Approval Status [Section 1]

          a.   Not Reviewed | Approved | Not Approved *{single selection- default 'Not Reviewed'}*

        12.   **Requesting Campus Comments [Section 1]**

6. **Requesting campus AVP/Designee updates their 'Approval Status' fields and saves changes**

    1.   <u>**Fields populated by AVP/Designee:**</u>

      i.   **Requesting Campus Review [*label;* Section 1]**

        1.   Request Presented By [Section 1]

        2.   Business Owner [Section 1]

        3.   Business Owner Review Status [Section 1]

          a.   Not Reviewed | Reviewed *{single selection- default 'Not Reviewed'}*

        4.   Campus Functional Analyst [Section 1]

        5.   Campus Functional Analyst Review Status [Section 1]

11. **AVP/Designee Approval Status [Section 1]**
    a. **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*
12. **Requesting Campus Comments [Section 1]**

7. **WORKFLOW updates field 'Request Status'**
    1. **Fields populated automatically:**
        i. **Request Status [Section 5] = "Requesting Campus AVP Approval" where AVP/Designee approval status is "Approved"**
        ii. **Request Status [Section 5] = "Requesting Campus AVP Disapproval" where AVP/Designee approval status is "Not Approved"**

8. **WORKFLOW sends email notification to EMPS/ES for Approved requests:**
    1. **EMPS analyst (based on field 'Business Area')**
    2. **Technical Managers (Leo Moreno, Khalid Bhatti)**

9. **EMPS analyst updates their 'EMPS Review Status' fields (and updates Section 1 items as appropriate) and saves changes; ES managers updates their 'ES Review Status' fields and save changes**
    1. **Fields populated by ES:**
        i. **ES Review Status [Section 2]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}* **[Section 2]**
        ii. **Estimated Development Hours [Section 2]**
        iii. **ES Developer (if Campus Developer not assigned) [Section 2]**
        iv. **ES Comments [Section 2]**
    2. **Fields populated by EMPS analyst:**
        i. **Section 1 items as appropriate**
        ii. **Module(s) Affected [Section 2]**
            1. **Academic Advising | Admissions | Campus Community | Financial Aid | Reporting | Security | SEVIS | Student Financials | Student Records | Student Recruiting** *{multiple selection}*
        iii. **Campus(es) Affected [Section 2]**
            1. **UH | UHCL | UHV | UHD** *{multiple selection}*
        iv. **Sister Campuses Review [Section 2]...(*EMPS only fill out for non-requesting campuses and leave blank the group of fields for the requesting campus*)**
            1. **UHM Business Owner [Section 2]**
            2. **UHM Campus Functional Analyst [Section 2]**
            3. **UHM Campus Lead [Section 2]**
            4. **UHM AVP or Designee [Section 2]**
            5. **UHCL Business Owner [Section 2]**
            6. **UHCL Campus Functional Analyst [Section 2]**
            7. **UHCL Campus Lead [Section 2]**
            8. **UHCL AVP or Designee [Section 2]**
            9. **UHV Business Owner [Section 2]**
            10. **UHV Campus Functional Analyst [Section 2]**
            11. **UHV Campus Lead [Section 2]**
            12. **UHV AVP or Designee [Section 2]**
            13. **UHD Business Owner [Section 2]**
            14. **UHD Campus Functional Analyst [Section 2]**
            15. **UHD Campus Lead [Section 2]**
            16. **UHD AVP or Designee [Section 2]**

v.   **EMPS Review Status** [Section 2]
                 1. **Not Reviewed | Updating Documentation | Forwarded for Sister Campuses Review | Post 72-Hr EMPS Review | Completed** *{single selection- default 'Not Reviewed'}*
            vi. **EMPS Comments** [Section 2]
10. **WORKFLOW sends email notification to Sister Campuses Reviewers identified in 9-b-iv above where populated once EMPS updates field 'EMPS Review Status' to "Forwarded for Sister Campuses Review" and saves status**
    1. **UHM Business Owner**
    2. **UHM Campus Functional Analyst**
    3. **UHM Campus Lead**
    4. **UHM AVP or Designee**
    5. **UHCL Business Owner**
    6. **UHCL Campus Functional Analyst**
    7. **UHCL Campus Lead**
    8. **UHCL AVP or Designee**
    9. **UHV Business Owner**
    10. **UHV Campus Functional Analyst**
    11. **UHV Campus Lead**
    12. **UHV AVP or Designee**
    13. **UHD Business Owner**
    14. **UHD Campus Functional Analyst**
    15. **UHD Campus Lead**
    16. **UHD AVP or Designee**
11. **WORKFLOW updates field 'Request Status'; 72-Hour review period begins (another hidden field also updated???) and updates field 'CM ES Developer'**
    1. **Fields populated automatically:**
        i.   **Request Status** [Section 5] = **"Sister Campus Review"** where EMPS Review Status is "Forwarded for Sister Campus Review"
        ii. **ES Developer_CM** [Section 3] = XXXXXXXXXXXXXXXXXXXXXXXXXXXX
12. **Appropriate sister campuses reviewers update their 'Review Status' fields and AVP/Designees update their 'Approval Status' fields**
    1. **Fields populated by Sister Campus Reviewers:**
        i.   **Section 1 items as appropriate (ie Benefits, Risks, Options)**
        ii. **Sister Campuses Review** [*label;* **Section 2**]
             1. UHM Business Owner [Section 2]
             2. **UHM Business Owner Review Status** [Section 2]
                 a. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
             3. UHM Campus Functional Analyst [Section 2]
             4. **UHM Campus Functional Analyst Review Status** [Section 2]
                 a. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
             5. UHM Campus Lead [Section 2]
             6. **UHM Campus Lead Review Status** [Section 2]
                 a. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
             7. UHM AVP or Designee [Section 2]
             8. **UHM AVP/Designee Approval Status** [Section 2]
                 a. **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

             9. UHCL Business Owner [Section 2]
             10. **UHCL Business Owner Review Status** [Section 2]
                 i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
             11. UHCL Campus Functional Analyst [Section 2]
             12. **UHCL Campus Functional Analyst Review Status** [Section 2]
                 i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
             13. UHCL Campus Lead [Section 2]

14. **UHCL Campus Lead Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
15. UHCL AVP or Designee [Section 2]
16. **UHCL AVP/Designee Approval Status** [Section 2]
    i. **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

17. UHV Business Owner [Section 2]
18. **UHV Business Owner Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
19. UHV Campus Functional Analyst [Section 2]
20. **UHV Campus Functional Analyst Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
21. UHV Campus Lead [Section 2]
22. **UHV Campus Lead Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
23. UHV AVP or Designee [Section 2]
24. **UHV AVP/Designee Approval Status** [Section 2]
    i. **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

25. UHD Business Owner [Section 2]
26. **UHD Business Owner Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
27. UHD Campus Functional Analyst [Section 2]
28. **UHD Campus Functional Analyst Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
29. UHD Campus Lead [Section 2]
30. **UHD Campus Lead Review Status** [Section 2]
    i. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
31. UHD AVP or Designee [Section 2]
32. **UHD AVP/Designee Approval Status** [Section 2]
    i. **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

33. **Sister Campuses Comments (UHM/UHCL/UHV/UHD)** [Section 2]

13. **WORKFLOW updates field 'Request Status' and field 'EMPS Review Status' at end of 72-Hour review period**
    1. **Fields populated automatically:**
        i. **Request Status** [Section 5] **= "72-Hr Review Period Expired"**
        ii. **EMPS Review Status** [Section 2] **= "Post 72-Hr EMPS Review"**
14. **WORKFLOW sends email notification to EMPS for Post 72-Hr review and update:**
    1. **EMPS analyst (based on field 'Business Area')**
15. **EMPS analyst reviews request for completeness and updates 'EMPS Review Status' field to completed (and updates Section 1 and Section 2 items as appropriate) and saves changes**
    1. **Fields populated by EMPS analyst:**
        i. **Section 1/2 items as appropriate**
        ii. **EMPS Review Status** [Section 2] **= "Completed"**
            1. **Not Reviewed | Updating Documentation | Forwarded for Sister Campuses Review | Post 72-Hr EMPS Review | Completed** *{single selection- default 'Not Reviewed'}*
        iii. **EMPS Comments** [Section 2]
16. **WORKFLOW sends email notification to Change Management reviewers**
    1. **Presenter (Initiating Campus)**
    2. **Functional Analyst (Initiating Campus)**
    3. **Developer (if to be assigned, Initiating Campus)**
    4. **Campus Lead UHCL**
    5. **Campus Lead UHM**

6. **Campus Lead UHV**
7. **Campus Lead UHD**
8. **EMPS Director**
9. **EMPS Analyst (CM)**
10. **ES Director**
11. **ES Developer (CM)**
12. **ES Technical Manager (1)**
13. **ES Technical Manager (2)**

17. **Change management EMPS/ES Director assigns 'CM Review Date/Time' for request item**
    1. **Fields populated by EMPS/ES Director:**
        i. **CM Review Date/Time [Section 3] = "mm/dd/yyyy; hh/mm"**
18. **WORKFLOW sends email notification to Change Management reviewers from #16 above of the meeting date/time (phone bridge# nnn-nnn-nnnn, pin# nnn)**
19. **CM Reviewers conduct meeting**
20. **CM Reviewers update their prospective 'Review Status' fields to value "Reviewed"**
    1. **Fields populated by CM Reviewers:**
        i. **Presenter (Initiating Campus) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        ii. **Functional Analyst (Initiating Campus) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        iii. **Developer (if to be assigned, Initiating Campus) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        iv. **Campus Lead UHCL Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        v. **Campus Lead UHM Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        vi. **Campus Lead UHV Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        vii. **Campus Lead UHD Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        viii. **EMPS Director Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        ix. **EMPS Analyst (CM) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        x. **ES Director Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        xi. **ES Developer (CM) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        xii. **ES Technical Manager (1) Review Status [Section 3]**
            1. **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*
        xiii. **ES Technical Manager (2) Review Status [Section 3]**
21. **CM Team updates 'Reviewers Recommendations (Completed by Change Management Team)', 'Support for Change Management Team's Recommendation', and 'Recommended Enhancements' fields**
    1. **Fields populated by CM Team:**
        i. **Option 1 Enhancement/Alternative [Section 4]**
        ii. **Option 1 Estimated Development Hours [Section 4]**
        iii. **Option 1 Recommendation [Section 4]**
        iv. **Option 2 Enhancement/Alternative [Section 4]**
        v. **Option 2 Estimated Development Hours [Section 4]**
        vi. **Option 2 Recommendation [Section 4]**
        vii. **Option 3 Enhancement/Alternative [Section 4]**
        viii. **Option 3 Estimated Development Hours [Section 4]**
        ix. **Option 3 Recommendation [Section 4]**

      x.   **Option - Upcoming Oracle Improvements** [Section 4]
     xi.   **Support for Change Management Team's Recommendation** [Section 4]
    xii.   **Recommended Enhancements** [Section 4]
   xiii.   **Request Status** [Section 4] = "Recommendation Provided"

22. **WORKFLOW sends email notification of Recommendation Status to parties of interest**
    1. **Presenter (Initiating Campus)**
    2. **Developer (if to be assigned, Initiating Campus)**
    3. **UHM Business Owner**
    4. **UHM Campus Functional Analyst**
    5. **UHM Campus Lead**
    6. **UHM AVP or Designee**
    7. **UHCL Business Owner**
    8. **UHCL Campus Functional Analyst**
    9. **UHCL Campus Lead**
    10. **UHCL AVP or Designee**
    11. **UHV Business Owner**
    12. **UHV Campus Functional Analyst**
    13. **UHV Campus Lead**
    14. **UHV AVP or Designee**
    15. **UHD Business Owner**
    16. **UHD Campus Functional Analyst**
    17. **UHD Campus Lead**
    18. **UHD AVP or Designee**
    19. **EMPS Director**
    20. **EMPS Analyst (CM)**
    21. **ES Director**
    22. **ES Developer (CM)**
    23. **ES Technical Manager (1)**
    24. **ES Technical Manager (2)**

23. **EMPS analyst updates 'CSR Number' field if development work needed based on recommendation**
    1. **Fields populated by EMPS analyst:**
       i.   **CSR Number** [Section 5]

Sharepoint List Title:
1. **UHS Enhancement Request Business Case**

Section Titles:
1. **Section I - Proposed Enhancement Information**
2. **Section II - Sister Campus, EMPS and ES Technical Review**
3. **Section III - Change Management Review**
4. **Section IV - Reviewers' Recommendations (Completed by Change Management Team), Support for Change Management Team's Recommendation, Recommended Enhancements**
5. **Section V - Request Status, Request Number, CSR Number**

EMPS Workflow Lookup table:

Business Area	Workflow Analyst	Email
Academic Advising	Lee, Sara	don't think need this column
Admissions	Gantt, Alicia	
Campus Community	Chaney, Jackie	
Financial Aid	Hampton, Charita	
Reporting	Coleman, Marie	
Security	Saeed, Javaria	
SEVIS	Triantoro, Riod	
Student Financials	Hampton, Charita	
Student Records	Nguyen, Nhi	
Student Recruiting	Chaney, Jackie	

Fields:

1. **Section I - Proposed Enhancement Information [*label*; Section 1]**
2. **Enhancement Request Title [Section 1]**
3. **Requesting Campus [Section 1]**
   - **UH | UHCL | UHV | UHD** *{single selection}*

   Business Area [Section 1]
   - **Academic Advising | Admissions | Campus Community | Financial Aid | Reporting | Security | SEVIS | Student Financials | Student Records | Student Recruiting** *{single selection}*

   Date Desired in Production [Section 1]

   Enhancement Type 1 [Section 1]
   - **Administrative | Self-Service** *{multiple selection}*

   Enhancement Type 2 [Section 1]
   - **Federal | State | Institutional** *{single selection}*

   Enhancement Category [Section 1]
   - **Preventative | Corrective | Expansion** *{multiple selection}*

   Developer Resources to be Used [Section 1]
   - **UHS Developer | Campus Developer** *{single selection}*

   Description of Request [Section 1]

   Current Business Practice [Section 1]

   Delivered Campus Solutions Functionality [Section 1]

   Description of Requested Enhancement [Section 1]

   University Community Affected by the Proposed Enhancement [Section 1]

   Benefit(s) of Proposed Ehancement (Also specify…..) [Section 1]

   Risk/Impact of not performing the Proposed Enhancement [Section 1]

   Potential Cost Saving [Section 1]

   Proposed Enhancement and Alternatives [*label*; Section 1]

   Option 1: [Section 1]

   Option 1: Proposed Enhancement and Alternative [Section 1]

   Option 1: Estimated Manual Hours [Section 1]

   Option 1: Number of Students Affected [Section 1]

   Option 1: Number of Administrative Users Affected [Section 1]

   Option 2: [Section 1]

   Option 2: Proposed Enhancement and Alternative [Section 1]

   Option 2: Estimated Manual Hours [Section 1]

   Option 2: Number of Students Affected [Section 1]

Option 2: Number of Administrative Users Affected [Section 1]

Option 3: [Section 1]

Option 3: Proposed Enhancement and Alternative [Section 1]

Option 3: Estimated Manual Hours [Section 1]

Option 3: Number of Students Affected [Section 1]

Option 3: Number of Administrative Users Affected [Section 1]

Upcoming Oracle Improvements: [Section 1]

Upcoming Oracle Improvements: Proposed Enhancement and Alternative [Section 1]

Upcoming Oracle Improvements: Estimated Manual Hours [Section 1]

Upcoming Oracle Improvements: Number of Students Affected [Section 1]

Upcoming Oracle Improvements: Number of Administrative Users Affected [Section 1]

Requesting Campus Review [*label*; Section 1]

Request Presented By [Section 1]

Business Owner [Section 1]

Business Owner Review Status [Section 1]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Functional Analyst [Section 1]

Campus Functional Analyst Review Status [Section 1]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Developer (if to be assigned) [Section 1]

Campus Developer Review Status [Section 1]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Lead [Section 1]

Campus Lead Review Status [Section 1]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

AVP or Designee [Section 1]

AVP/Designee Approval Status [Section 1]

- **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

Requesting Campus Review Status [Section 1]

- **Document Preparation | Submitted for AVP Approval | Request Cancelled** *{default is 'Document Preparation'}*

Requesting Campus Comments [Section 1]

Created By [Internal, Section 1]

Date Created [Internal, Section 1]

ID Number [internal system document number]

Section II - Sister Campus, EMPS and ES Technical Review [*label*; Section 2]

Module(s) Affected [Section 2]

- **Academic Advising | Admissions | Campus Community | Financial Aid | Reporting | Security | SEVIS | Student Financials | Student Records | Student Recruiting** *{multiple selection}*

Campus(es) Affected [Section 2]

- **UH | UHCL | UHV | UHD** *{multiple selection}*

UHM Business Owner [Section 2]

UHM Business Owner Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHM Campus Functional Analyst [Section 2]

UHM Campus Functional Analyst Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHM Campus Lead [Section 2]

UHM Campus Lead Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHM AVP or Designee [Section 2]

UHM AVP/Designee Approval Status [Section 2]

- **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

UHCL Business Owner [Section 2]

UHCL Business Owner Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHCL Campus Functional Analyst [Section 2]

UHM Campus Functional Analyst Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHCL Campus Lead [Section 2]

UHCL Campus Lead Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHCL AVP or Designee [Section 2]

UHCL AVP/Designee Approval Status [Section 2]

- **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

UHV Business Owner [Section 2]

UHV Business Owner Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHV Campus Functional Analyst [Section 2]

UHV Campus Functional Analyst Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHV Campus Lead [Section 2]

UHV Campus Lead Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHV AVP or Designee [Section 2]

UHV AVP/Designee Approval Status [Section 2]

- **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

UHD Business Owner [Section 2]

UHD Business Owner Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHD Campus Functional Analyst [Section 2]

UHD Campus Functional Analyst Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHD Campus Lead [Section 2]

UHD Campus Lead Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

UHD AVP or Designee [Section 2]

UHD AVP/Designee Approval Status [Section 2]

- **Not Reviewed | Approved | Not Approved** *{single selection- default 'Not Reviewed'}*

Sister Campuses Comments (UHM/UHCL/UHV/UHD) [Section 2]

EMPS Review Status [Section 2]

- **Not Reviewed | Updating Documentation | Forwarded for Sister Campuses Review | Post 72-Hr EMPS Review | Completed** *{single selection- default 'Not Reviewed'}*

EMPS Comments [Section 2]

ES Review Status [Section 2]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}* [Section 2]

Estimated Development Hours [Section 2]

ES Developer (if Campus Developer not assigned) [Section 2]

ES Comments [Section 2]

Section III - Change Management Review [*label*; Section 3]

CM Review Date/Time [Section 3, *date and time*]

Presenter (Initiating Campus) [Section 3] = field 'Request Presented By' in Section 1

Presenter (Initiating Campus) Review Status [Section 3]

- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Functional Analyst (Initiating Campus) [Section 3] = field 'Campus Functional Analyst' in Section 1
Functional Analyst (Initiating Campus) Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Developer (if to be assigned, Initiating Campus) [Section 3] = field 'Campus Developer' in Section 1
Developer (if to be assigned, Initiating Campus) Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Lead UHCL [Section 3]
Campus Lead UHCL Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Lead UHM [Section 3]
Campus Lead UHM Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Lead UHV [Section 3]
Campus Lead UHV Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Campus Lead UHD [Section 3]
Campus Lead UHD Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

EMPS Director [Section 3]
EMPS Director Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

EMPS Analyst (CM) [Section 3] = *"Analyst per the Workflow Analyst Lookup table"*
EMPS Analyst (CM) Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

ES Director [Section 3]
ES Director Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

ES Developer (CM) [Section 3]
ES Developer (CM) Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

ES Technical Manager (1) [Section 3]
ES Technical Manager Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

ES Technical Manager (2) [Section 3]
ES Technical Manager Review Status [Section 3]
- **Not Reviewed | Reviewed** *{single selection- default 'Not Reviewed'}*

Section IV - Reviewers' Recommendations (Completed by Change Management Team), Support for Change Management Team's Recommendation, Recommended Enhancements [*label*; Section 4]
Option 1 Enhancement/Alternative [Section 4]
Option 1 Estimated Development Hours [Section 4]
Option 1 Recommendation [Section 4]
Option 2 Enhancement/Alternative [Section 4]
Option 2 Estimated Development Hours [Section 4]
Option 2 Recommendation [Section 4]
Option 3 Enhancement/Alternative [Section 4]
Option 3 Estimated Development Hours [Section 4]
Option 3 Recommendation [Section 4]
Option - Upcoming Oracle Improvements [Section 4]
Support for Change Management Team's Recommendation [Section 4]
Recommended Enhancements [Section 4]

Section V - Request Status, Request Number, CSR Number [*label*; Section 5]