

# Using New Multi-Step Workflows in Stellic

# Today's Agenda

- Multi-step approval process workflows - a summary
- Student view
- Admin “Reviewer” view
- Workflow set-up

# Multi-Step Workflows: Definitions

- **Workflow:** A Stellar process created by an admin with the permission to create a workflow. All workflows must have an initial and final step with at least one reviewer in between.
- **Workflow type:** A pre-defined list of workflow “templates” established by the institution. The name and settings of the workflow type are configurable by the institution, which can then be used by any workflow creators.
- **Request:** The method to add a student to a workflow. Until a request has been initiated for/by a student, the student is not considered to be a part of the workflow review process.
  - Requests can be initiated on an individual basis (from the student’s page or through the workflow) or in bulk (through the workflow)
- **Creator:** An admin with the permission to create a workflow. Can view any requests for all students they have permission to see.
- **Reviewer:** A user that has to review a step of a workflow for approval or denial. Can view any requests where they are listed as a reviewer.
- **Initiator:** A user who is allowed to start a request for a student. This can be the student or an admin.

# Multi-Step Workflows: A Summary

- Workflows can be applicable for any process that requires approval from multiple parties. (i.e. degree clearance, plan review)
- The type of workflow needs to be established by the institution, but the steps are configured by any admin user with permission, reviewed by any admin user listed as a reviewer, then visible to any student eligible for the workflow.
- Approval processes can be step dependent or sent to all parties that need to approve the request at once.

## ● Completed

Dietrich College Undergraduate Graduation Review

Graduation Clearance

● APPROVED ▼

✓

Initiate Request  
Eudora Paucek, 04/26/21

✓

Primary Advisor  
Eudora Paucek, 04/26/21

✓

Dean of the College  
Vickie Woodhead, 04/26/21

Comments: All requirements, thesis, and GPA completed.

✓

Final

# Student View

Audit

Planner

Courses

Notes

Requests

New Request

- ✓ Select Request Type
  - Dietrich College Undergraduate Graduation Review
  - Film & Media Studies Minor Certification

● Completed

Dietrich College Undergraduate Graduation Review Graduation Clearance

● APPROVED >

# Advisor View

Students

Requests

Programs

Courses

Pathways

Keywords

Q search advisees

▽ Filters

Status ×

Workflow ×

status: Pending ×

Selected Workflow: EPP Graduation Request ×

reset all filters

4 Requests

EPP Graduation Request	Bart Herman	● PRIMARY ADVISOR APPROVAL	Updated a minute ago
EPP Graduation Request	Shauna McLaughlin	● PRIMARY ADVISOR APPROVAL	Updated a minute ago

# Workflow Editor

Overview

Editor

Requests

DESCRIPTION ⓘ

This is a workflow description that is customizable by the editor of the workflow.

[edit description](#)

ELIGIBLE STUDENTS

Type

All Students

CONFIGURE STEPS

→ Start Initiate Request ▾ [edit name](#)

Who can initiate the request?


☒ Primary Advisor ☒ Student ☒ Anyone with edit permission on student ☐ Specific user

Information to approve steps

⋮

Checkbox


Acknowledgement • required • visible to students

[edit](#) 

⋮

Auto


Current Progress



⋮

File Upload

Other Files • optional • not visible to students

[edit](#) 

[add information](#)

**<http://bit.ly/Stellic-Workflows>**

**Stellic**...