

RED Student Educational Award (SEA) Workflow Process Manual

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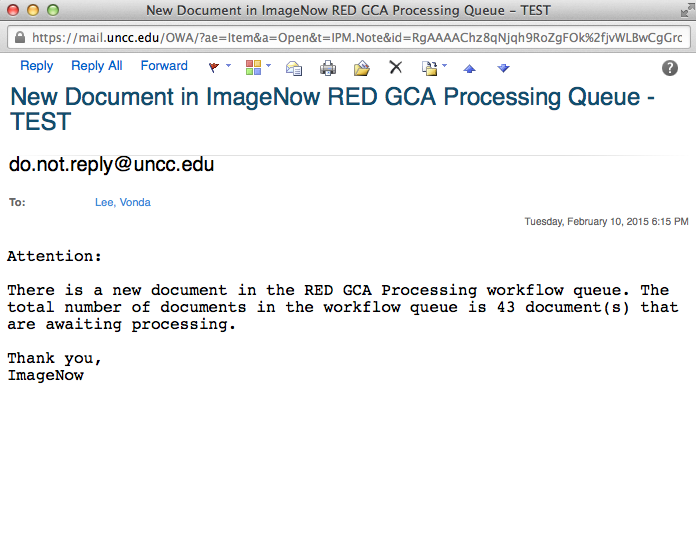
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# Notification of New Document in the Processing workflow queue:

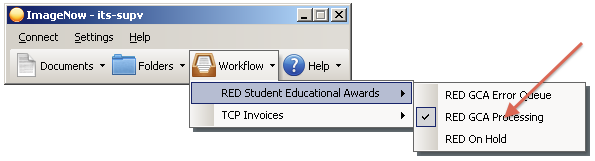
1. A Budget, Grants & Contracts, or Financial Aid Specialist will receive an email notification stating a new document is in the workflow queue for processing, as shown below:



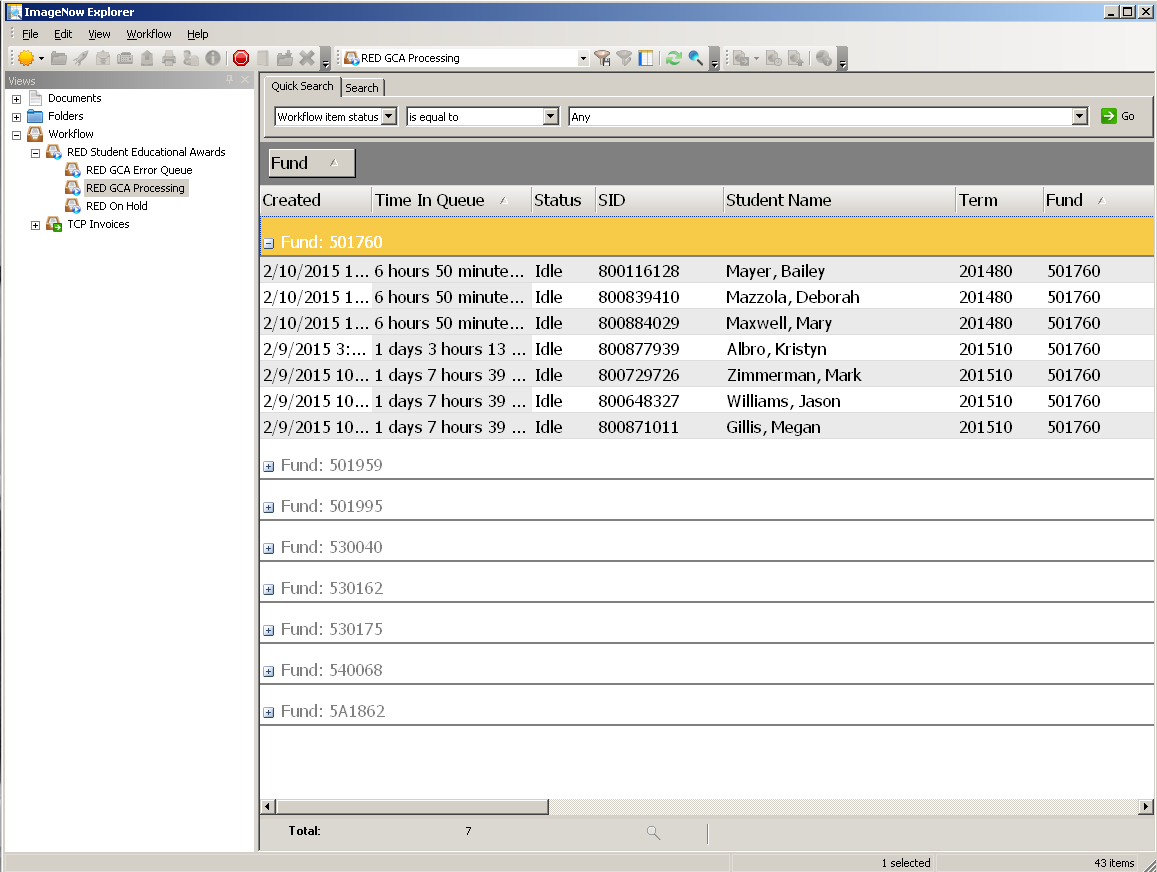
1. Login to ImageNow or WebNow using your NinerNet credentials and press the ***CONNECT*** button as shown below:



1. Proceed to the workflow queue identified in the email notification, as shown below:



1. An ImageNow Explorer window will display a list of award documents to be processed by the Specialist, as shown below:



**\*Note**: The document list (shown on the previous page) is grouped and sorted by *FUND* and *TIME IN QUEUE* for *Grants & Contracts Administration* only.

Other department workflow document lists will not be grouped and will be sorted by *TIME IN QUEUE*.

1. The award documents in the list are ready for approval and processing.
2. There will also be email notifications in the departmental email inboxes regarding student award form changes and cancelations. It is very important to check that email account on an hourly or daily basis. The email accounts are:

* For **Travel Awards**:

    Travel and Complex Payments

    Email: [travel@uncc.edu](mailto:travel@uncc.edu)

* For **Grant Funded Awards**:

   Office of Grants and Contracts Administration

   Email: [grants-contracts@uncc.edu](mailto:grants-contracts@uncc.edu)

* For **State Funded Awards**:

    Budget Office

    Email: [budget-genfund@uncc.edu](mailto:budget-genfund@uncc.edu)

* All **Other Funding Sources**:

    Office of Financial Aid

    Email: [finaid@uncc.edu](mailto:finaid@uncc.edu)

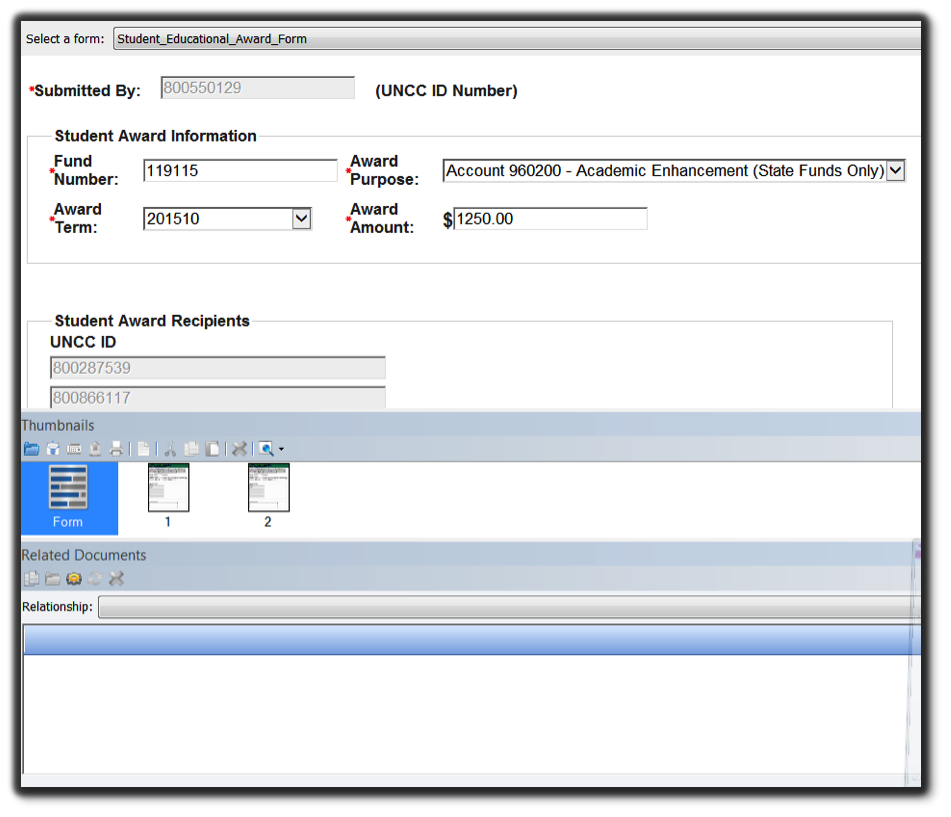
# Processing Documents in the Processing workflow queue:

1. The Budget, Grants & Contracts, or Financial Aid Specialist will select a document and double-click to open the document, as shown below:

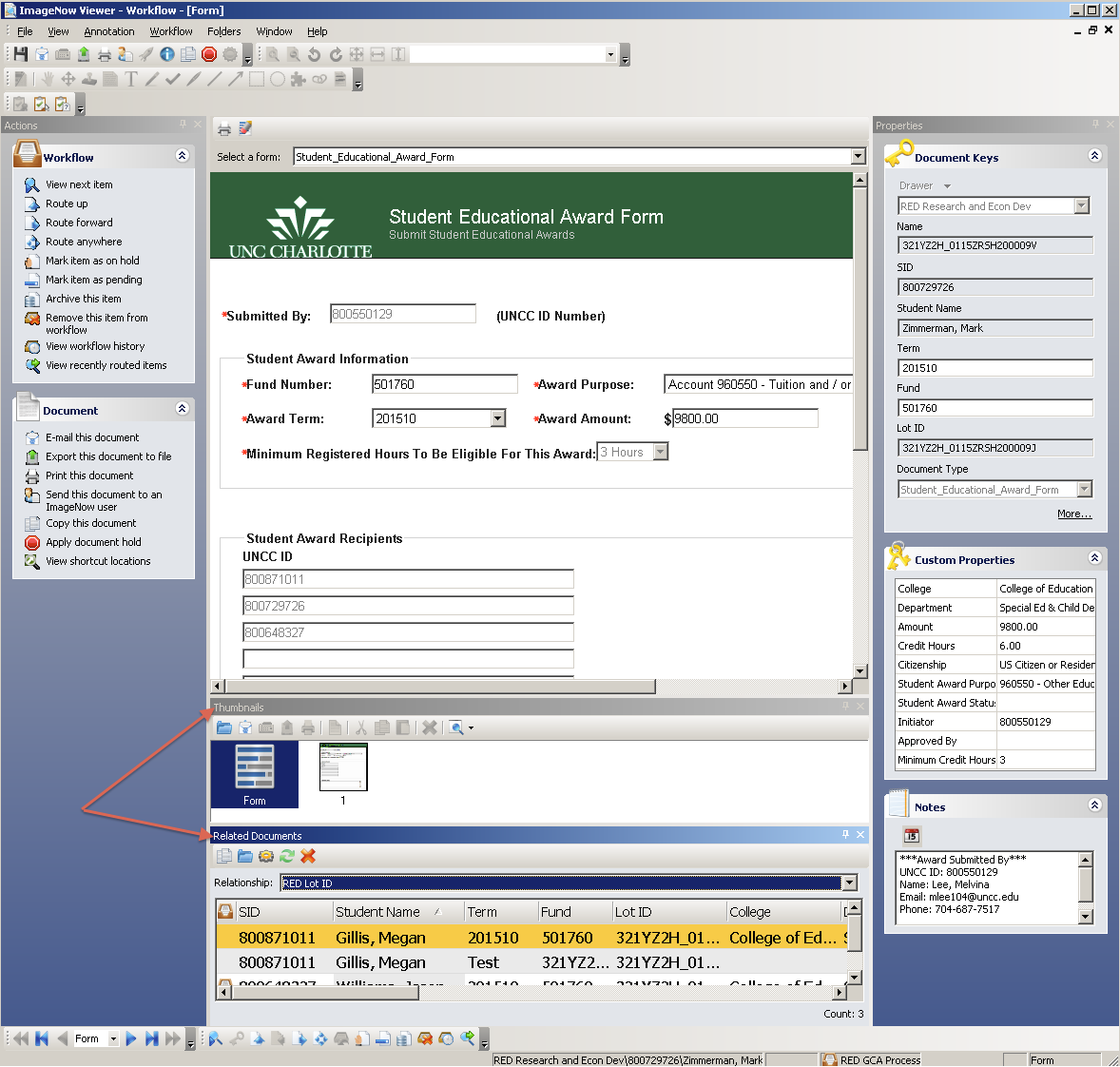


\*Note: You should review the form details, document keys, custom properties, and information in the *NOTES* field.

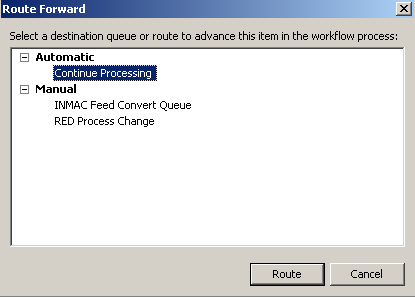
1. Ensure that the *THUMBNAIL* and *RELATED DOCUMENTS* views are evoked. See below.



1. To view any attachments that may have been submitted with the award, check the *THUMBNAILS* view. In addition to *Form* and *Page 1*, any additional pages will be displayed. \*Note: Not all documents will have attachments.
2. Check the *RELATED DOCUMENTS* view for duplicate award submissions using the ***RED Student ID – Duplicates*** relationship key. A list of documents will be displayed in the *RELATED DOCUMENTS* section, if applicable, as shown below.
3. To view other awards associated with the current award, select the relationship key, ***RED Lot ID***. A list of documents will be displayed in the *RELATED DOCUMENTS* section, if applicable, as shown below.



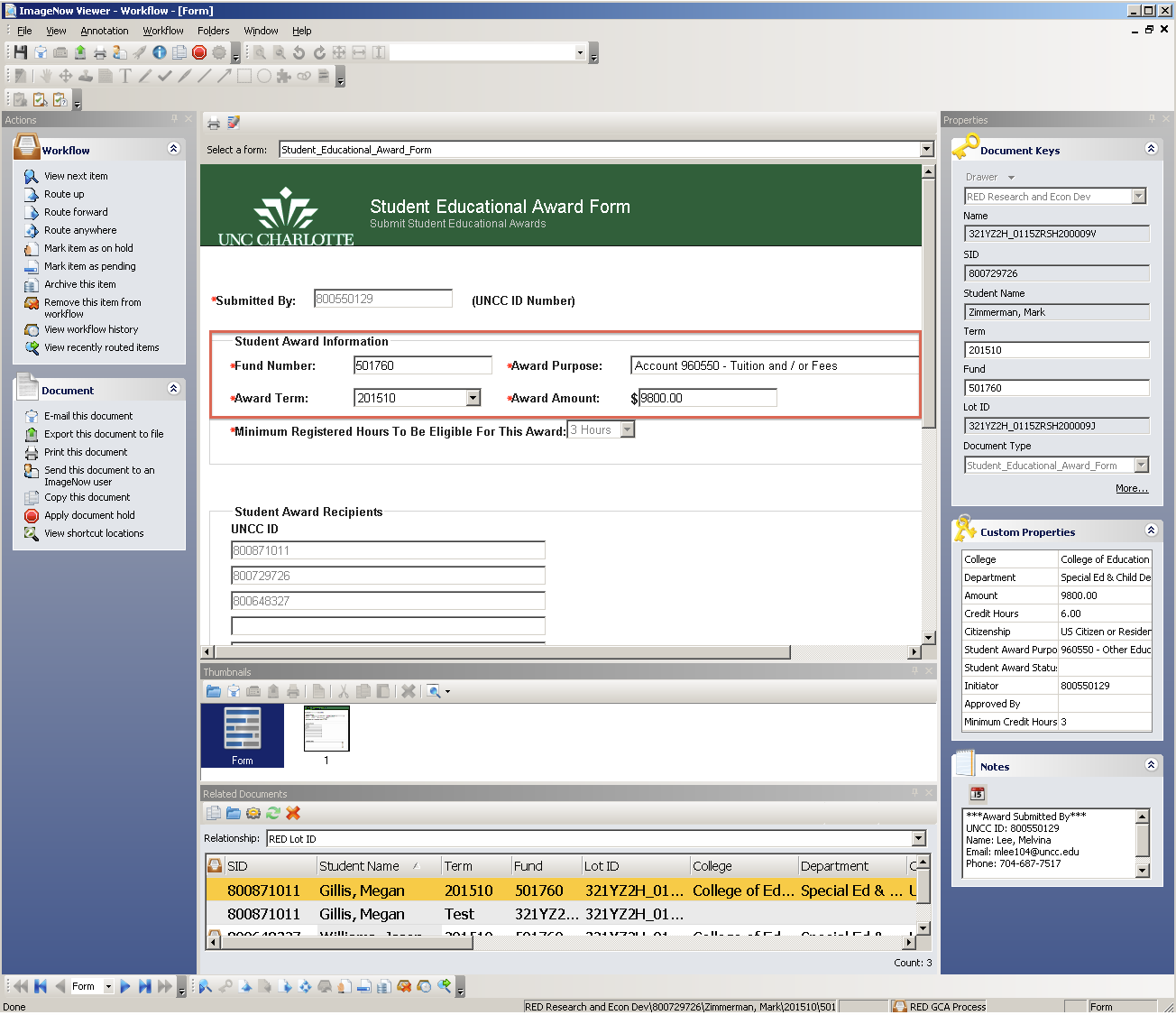
1. Review the following:
   1. Document keys
   2. Custom properties
   3. Form *Award Purpose*, *Comments*, and the *Award Submitted By*
   4. Any information in the *NOTES* field
2. Verify the ***Term*** is valid. If the term is equal to ***Other***:
   1. Look in the comments section of the form for the valid term.
   2. Enter that value in the document key field called ***Term***.
3. Verify that the *Credit Hours* field is greater than 0. If the *Credit Hours* field is equal to a negative one (-1), the SEA Initiator did not enter a valid term on the award form. If this happens:
   1. Lookup the *Credit Hours* in Banner for the term of the student listed.
   2. Enter that Banner credit hours value in the custom property field called ***Credit Hours***.
4. Once all departmental due diligence is completed, the Specialist will change the following custom properties:
   1. *Student Award Status*:
      1. Approved – award meets all grant, state, or other source fund requirements.
      2. Denied – award does not meet all grant, state, or other source fund requirements.
      3. Canceled – award was submitted in error.
   2. *Approved By* – enter the NinerNet credentials that approved, canceled, or denied the award.
5. Attached any additional supplemental documentation that you received regarding this award, if applicable, by using the drag-drop feature.
6. Route the document forward by clicking the *ROUTE FORWARD* link or icon. The window below is displayed:



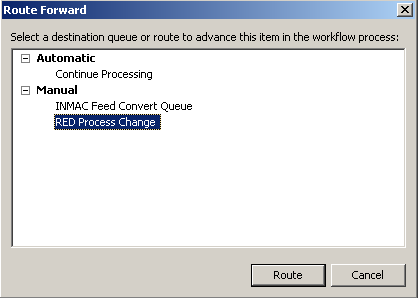
1. Select ***Continue Processing*** workflow queue. Based on the criteria, the document will either be routed to archive, Financial Aid, Travel, Tax, or Error queues.
2. If the award document has been *DENIED* or *CANCELED*, the document will be routed to archive and the Initiator will receive an email notification.

# Changing Award Forms in the Processing workflow queue:

1. The Budget, Grants & Contracts, or Financial Aid Specialist has the ability to change the *Student Award Information* on the actual form in the ImageNow Viewer, as shown below:



1. Position the cursor on any of the fields within the *Student Award Information* section of the form. Change the value of the field. Some fields within the section may have a drop-down menu. You will need to select a value in the list to populate the field.
2. Attached any additional supplemental documentation you received regarding changing this award (such as an email), by using the drag-drop feature.
3. Click the *SAVE* ****icon to save all changes.
4. Route the document forward by clicking the *ROUTE FORWARD* link or icon. The window below will be displayed:

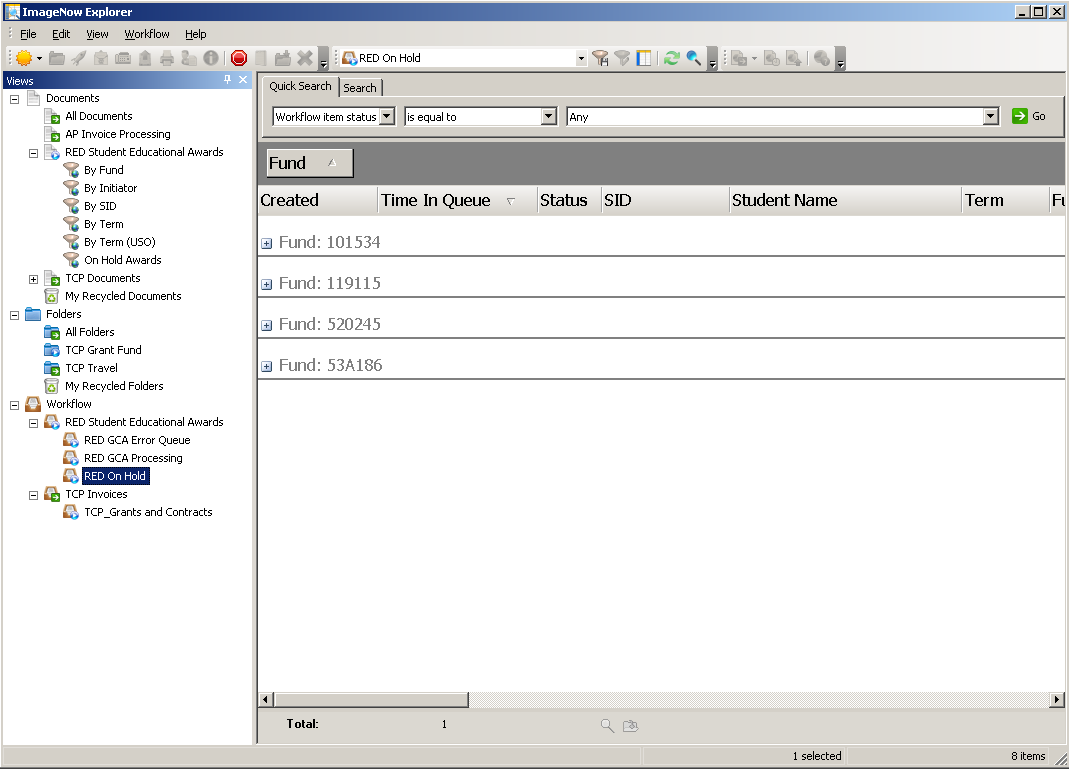


1. Select ***RED PROCESS CHANGE*** workflow queue. The document will be routed to a workflow queue that will re-index the document keys and custom properties.
2. The revised document will be routed back to the appropriate *PROCESSING* workflow queue for further processing.
3. Refer to the ***Processing Documents in the Processing Workflow Queue*** section of this document for further processing of the award document.

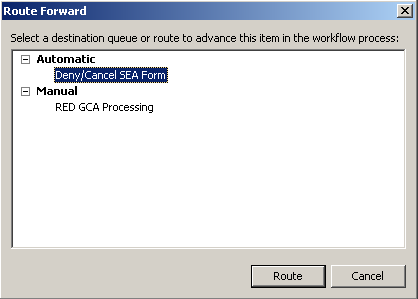
# Processing Documents in the On Hold workflow queue:

If a student has 0 credit hours entered for an award term, the document will be displayed in the ***RED On Hold*** workflow queue. These documents will reside in the queue until the student registers for classes or meets the restricted credit hours for that grant, state, or other source fund requirements. Once a student has registered or met the requirements, then the document will be automatically routed to the respective processing workflow queues.

1. A Budget, Grants & Contracts, Financial Aid, or Travel Specialist has the ability to cancel any awards in the ***RED On Hold*** workflow queue. In the ImageNow Explorer view, the documents are grouped by *FUND* as shown below:



1. Expand the desired *FUND* by clicking the “+” sign to display all the documents within that particular fund.
2. Open the selected document and attach any supplemental documentation to support the cancelling of the document. The drag-drop feature can be used to accomplish this.
3. Once all departmental due diligence is completed, the Specialist will change the following custom properties:
   1. *Student Award Status* to ***Canceled*** due to the award was submitted in error.
   2. *Approved By* - enter the NinerNet credentials that canceled the award.
4. Route the document forward by clicking the *ROUTE FORWARD* link or icon. The window below is displayed:



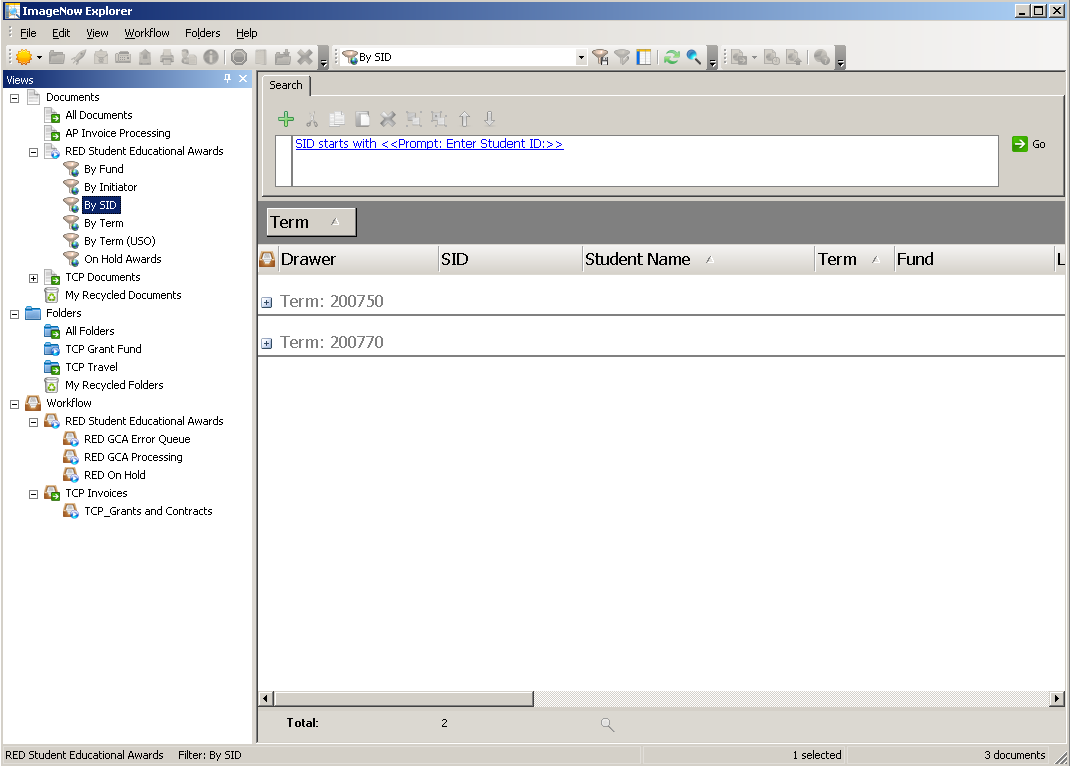
1. Select ***Deny/Cancel SEA Form*** workflow queue. The document will be routed to archive. The SEA Initiator will receive an email notification that the document has been canceled.

# Processing Historical Documents in the Processing workflow queue:

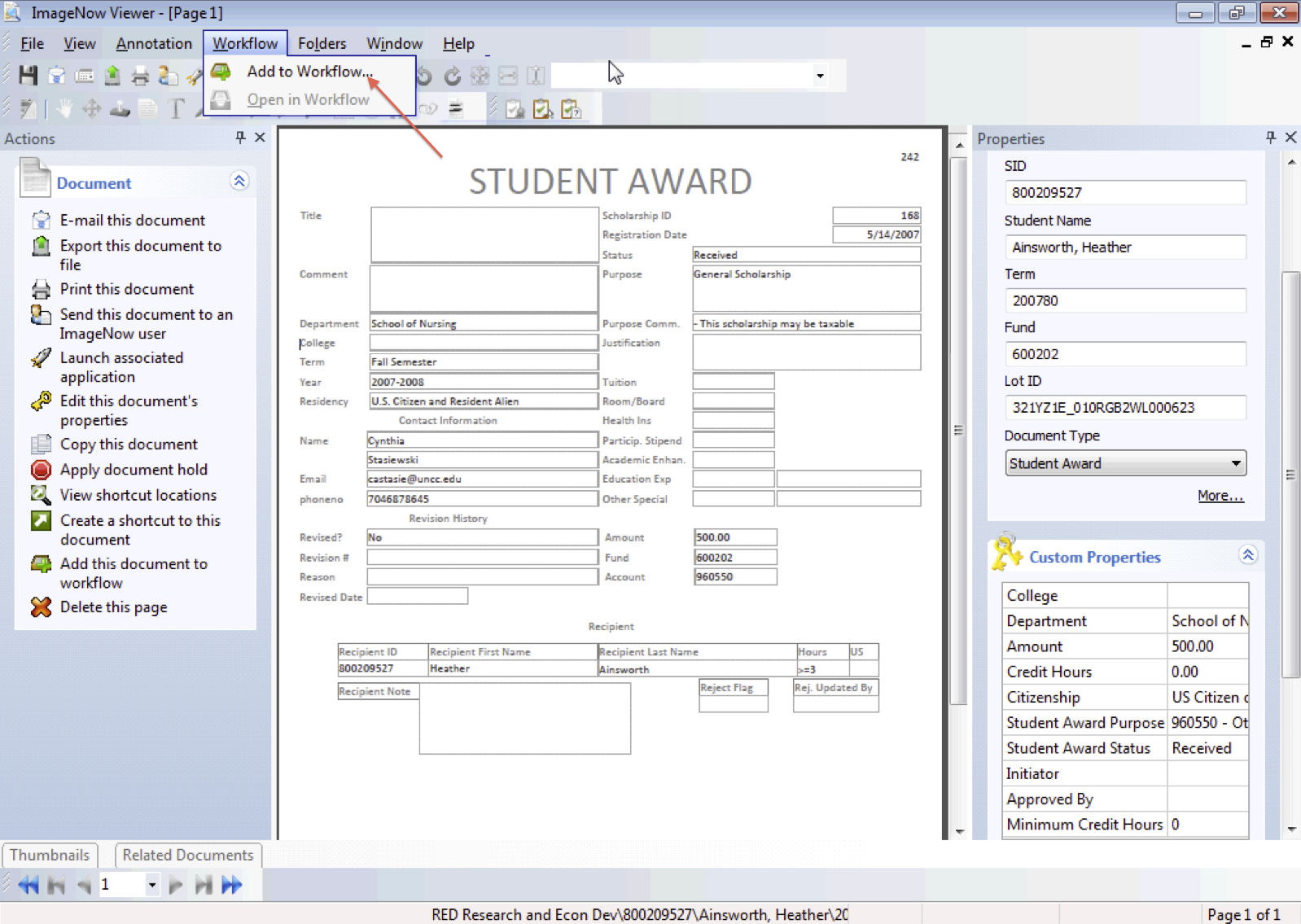
The documents created and processed using the legacy system will have a document type of *Student Award*. Documents processed in the new ImageNow system will have a document type of *Student\_Educational\_Award\_Form*.

If a historical document needs to be re-processed, do the following:

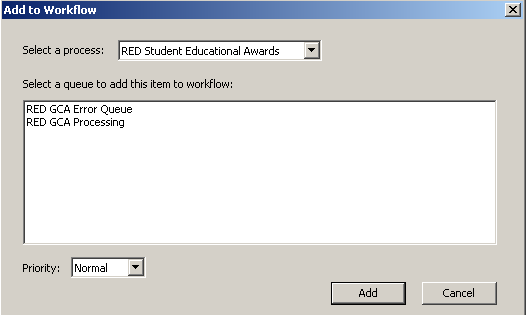
1. Search for the historical document in the document view called ***RED Student Educational Awards***. There are three (3) document view filters to assist in the search:
   1. By Fund
   2. By SID (Student ID)
   3. By Term
2. Click a document view filter.
3. Enter in the appropriate criteria for the selected document view filter. Click the ***OK*** button.
4. For example, the document view filter ***By SID*** is selected. The ImageNow Explorer window will display a list of documents for the Student ID entered, grouped by *Term*, as shown below:



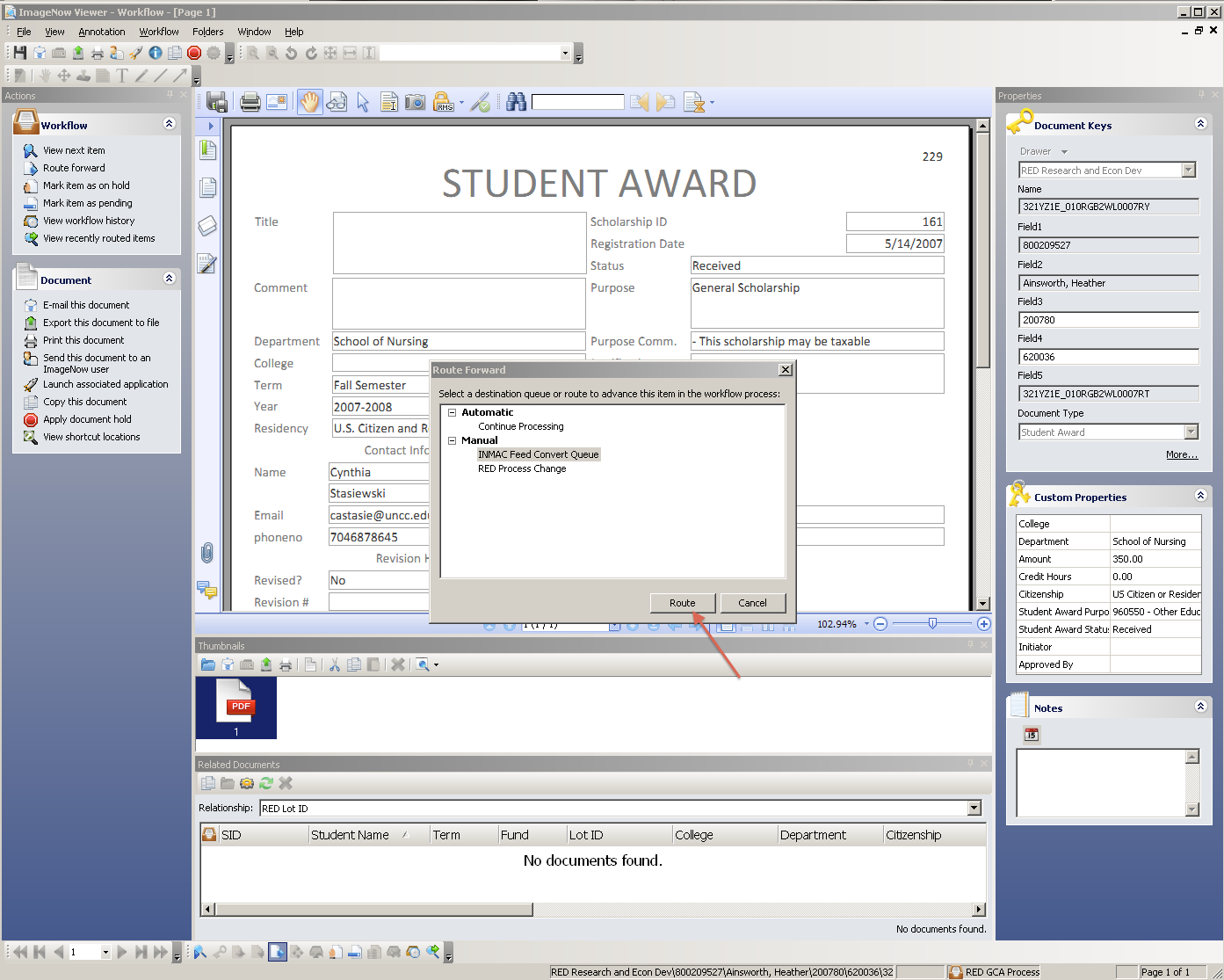
1. Expand the desired *TERM* by clicking the “+” sign to display all the documents within that particular term for the selected Student ID.
2. Open the desired document and click the link labeled ***WORKFLOW*** in the header of the document. Then select the *ADD TO WORKFLOW* option, as shown below:



1. An *ADD TO WORKFLOW* window will be displayed. Select the desired workflow to add the historical document. Click the *ADD* button to process, as shown below:



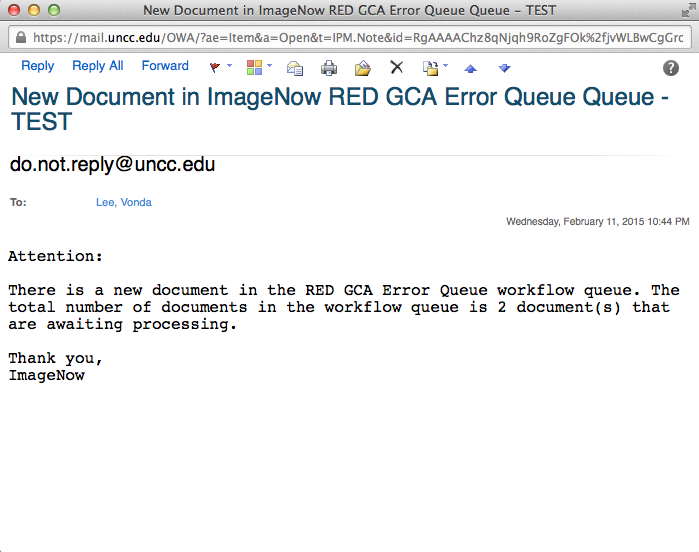
1. Click the link labeled ***WORKFLOW*** in the header of the document. Then select the *OPEN IN WORKFLOW* option. The document is now in workflow and ready to be processed.
2. All historical documents are PDF type documents. To annotate these documents, especially if the award document will become a DPR, route the document to the *INMAC FEED CONVERT QUEUE*. The document will be converted to TIFF and can be annotated once converted.
3. Press the *ROUTE FORWARD* link or icon to route the document to *INMAC FEED CONVERT QUEUE*.
4. A *ROUTE FORWARD* window will be displayed. Click the *ROUTE* button, as shown below:



1. The converted document will be routed back to the appropriate *PROCESSING* workflow queue for further processing.
2. Refer to the ***Processing Documents in the Processing Workflow Queue*** section of this document for assistance in further processing of the historical award document.

# Processing Documents in the Error workflow queue:

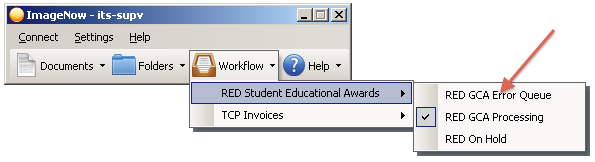
1. A Budget, Grants & Contracts, or Financial Aid Specialist will receive an email notification stating a new document is in the respective error workflow queue, as shown below:



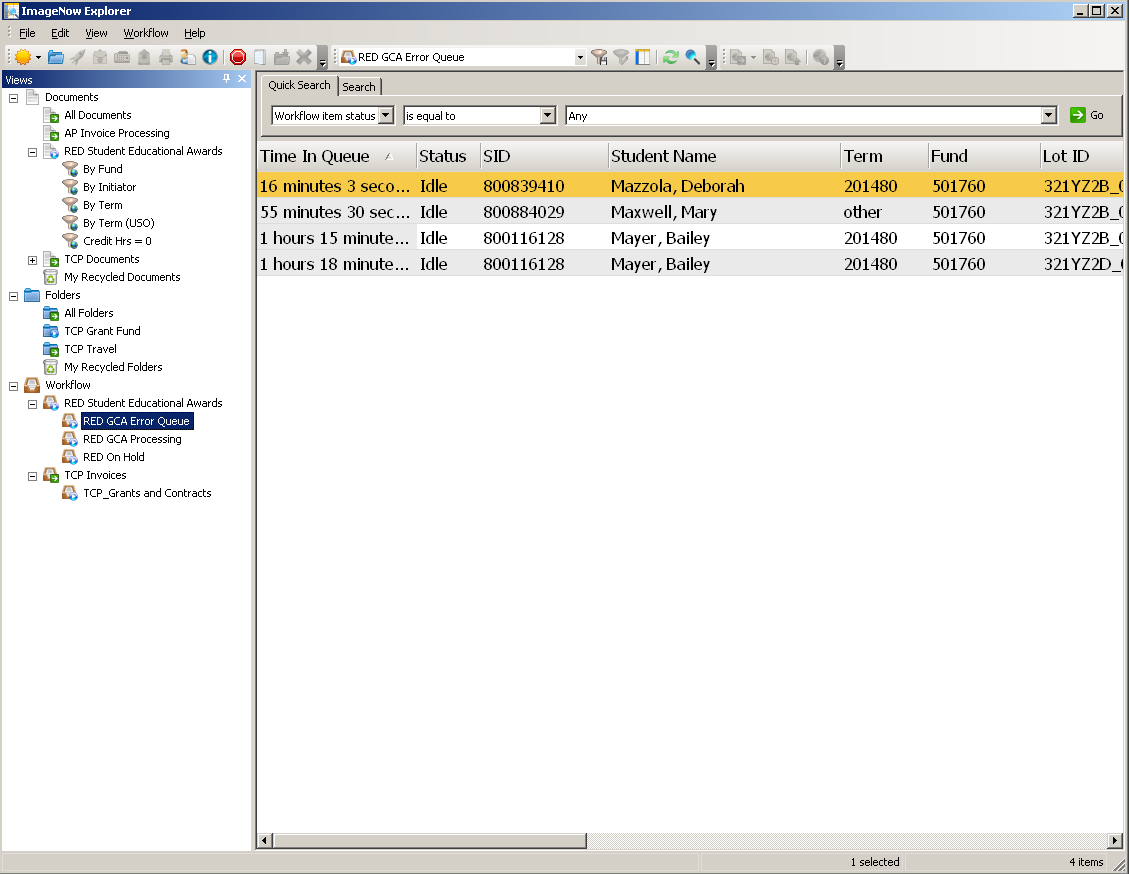
1. Login to ImageNow or WebNow using your NinerNet credentials and click the ***CONNECT*** button as shown below:



1. Proceed to the workflow queue mentioned in the email notification, as shown below:



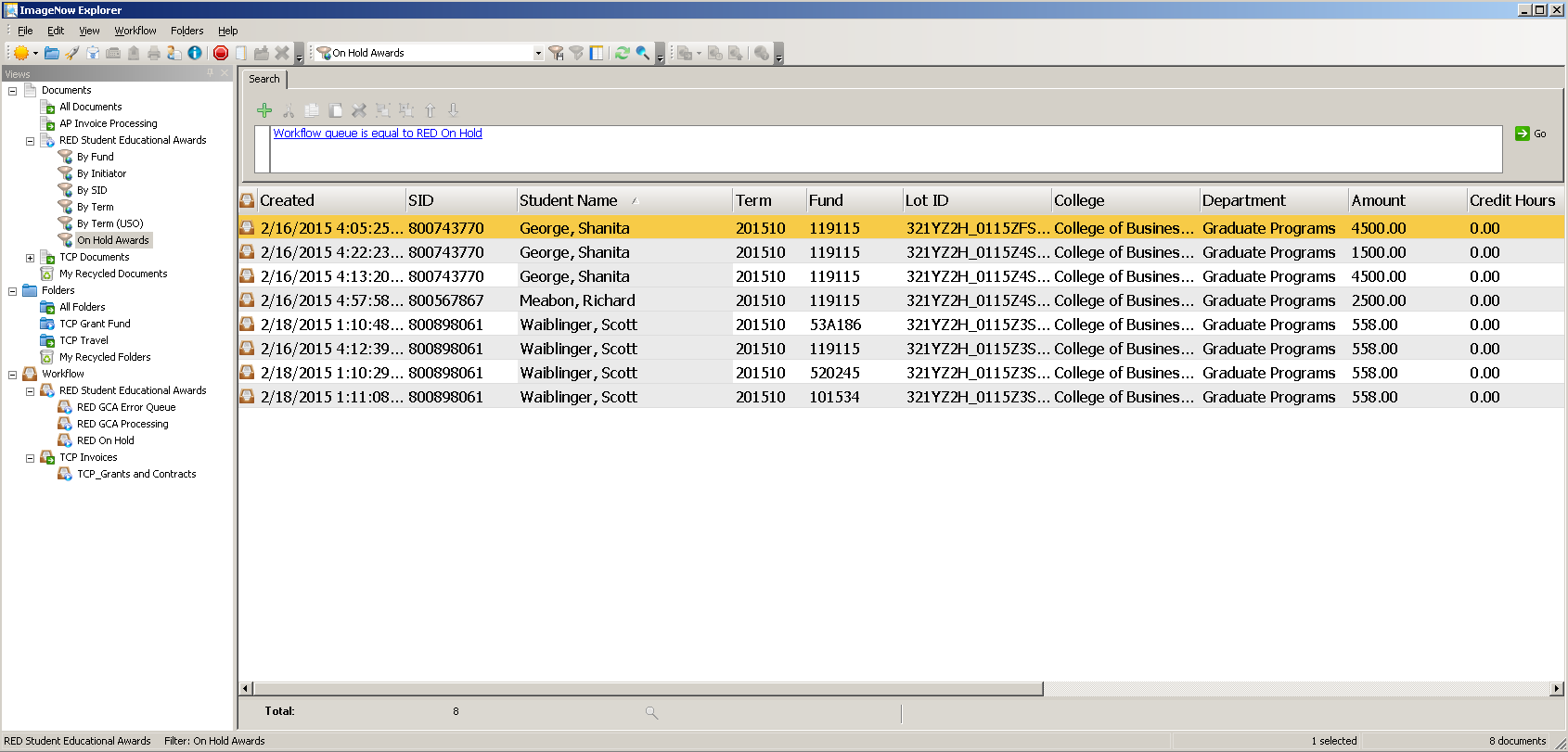
1. An ImageNow Explorer window will launch displaying a list of award documents that contain errors, as shown below:



1. There are there (3) reasons a document will enter the Error Queues:
   1. An invalid *Term* in the document keys.
   2. The custom property *Approved By* was not populated.
   3. The custom property *Credit Hours* contains a value of -1.
2. Correct the error listed above for documents in the queue.
3. Save the changes to the document by clicking the *SAVE* icon.
4. Click the *ROUTE BACK* icon or link to route the document back to ***RED Route Queue*** workflow queue to continue processing.
5. Documents left in an error queue will be deleted after 30 days.

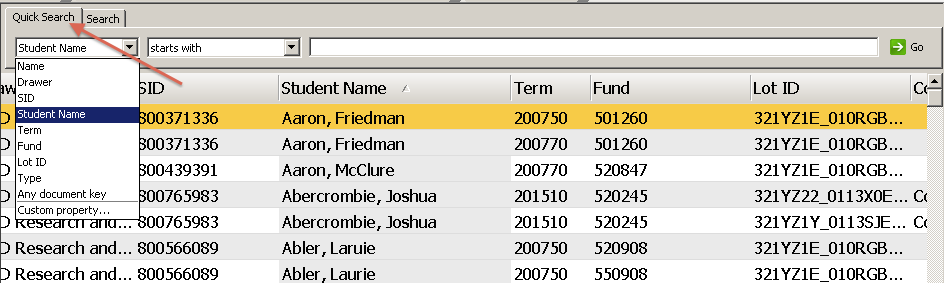
# Searching for Documents:

1. Search for documents in the document view called ***RED Student Educational Awards***. There are six (6) document view filters to assist in the search:
   1. By Fund
   2. By Initiator
   3. By SID (Student ID)
   4. By Term
   5. By Term (USO)
   6. On Hold Awards
2. Click a document view filter.
3. Enter in the appropriate criteria for the document view filter selected, if applicable, and click the ***OK*** button.
4. The ImageNow Explorer view will display a list of award documents that meet the selection criteria.
5. For example, the document view filter ***On Hold Awards*** is selected. The ImageNow Explorer window will display a list of documents that reside in the ***RED On Hold*** workflow queue, as shown below:



**\*Note:** The documents in this workflow queue have credit hours = 0 or does not meet the minimum credit hours for the grant, state, or other source fund.

1. You can search for documents using the Quick Search feature, as shown below:



1. Select and enter in the search criteria. Click the ***GO*** button to run the query. An ImageNow Explorer view will display a list of documents that meet the criterion.