



USING WORKCENTERS TO MANAGE GRADUATE APPLICATIONS

SESSION 5033
November 7, 2017

PRESENTERS

Matt Dumouchel

Manager of Information Systems

School of Graduate and
Postdoctoral Studies

mdumouc2@uwo.ca

Teri Hern

Manager of Graduate Admissions

School of Graduate and
Postdoctoral Studies

thern2@uwo.ca



WESTERN UNIVERSITY

Founded: 1878
Graduate students: ~5,500
Graduate programs: 85



WESTERN & ORACLE

Campus Solutions 9.0
Bundle 26
PeopleTools 8.54

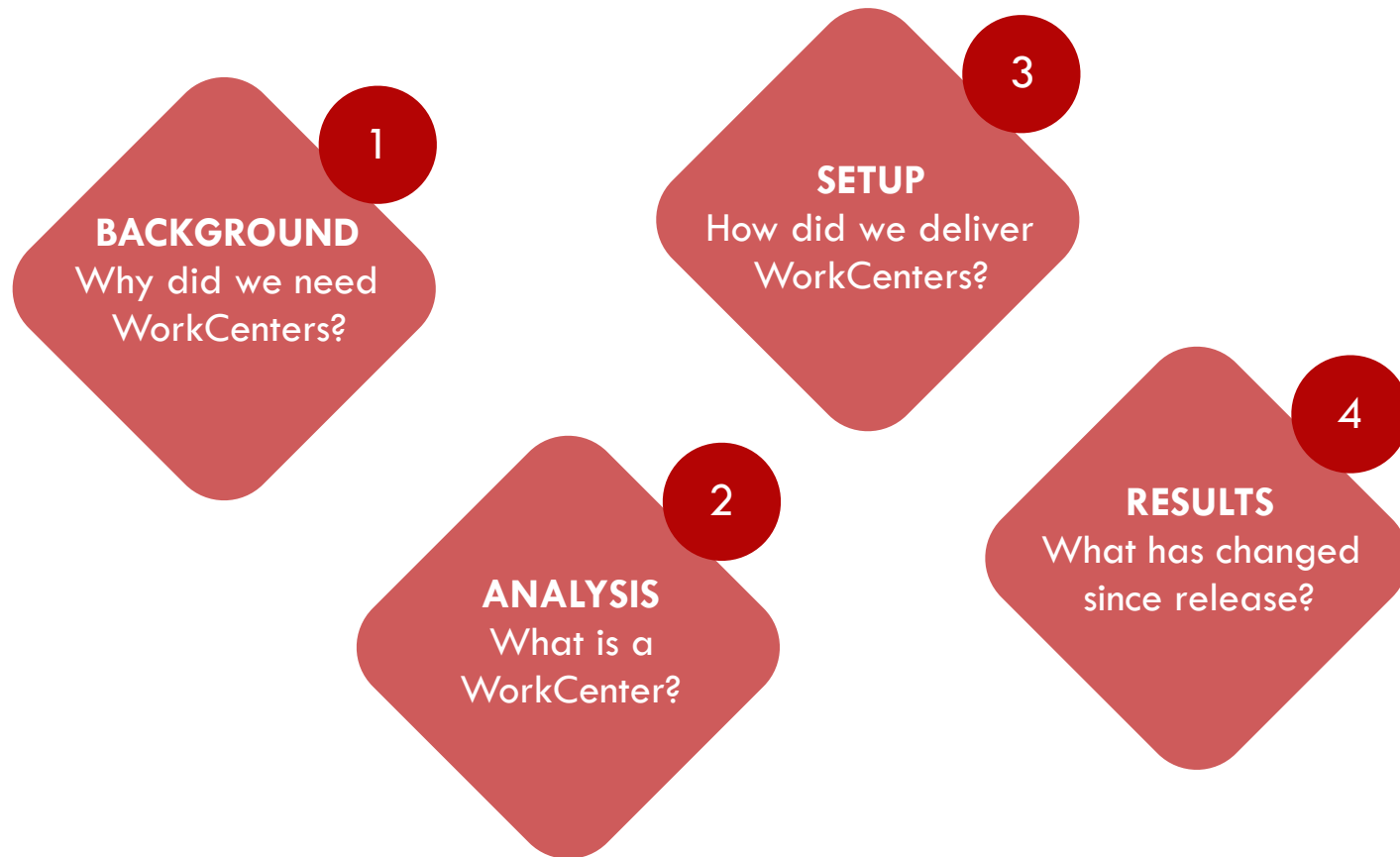
CANADA ALLIANCE 5-7 NOVEMBER 2017

GOALS FOR SESSION

We hope to...

1. Help you understand what a WorkCenter is and how it functions
2. Demonstrate how Western leveraged the technology to support the assessment of graduate applications
3. Provide you insight into the development and the lessons we learned and continue to learn

ROAD MAP



BACKGROUND

Why did we make use of
WorkCenters?

BACKGROUND

The screenshot displays a web application interface with a navigation bar at the top containing links for 'Application Data', 'Evaluator History', 'Additional Academic Info', 'Supplemental Information', 'SOPs Assessment', 'References', and 'Questions'. The main content area is divided into several sections:

- Metadata:** Includes fields for 'EMPLOYEE ID', 'USER ID', 'Created Date/Time', and 'Created By'. A 'Post Transaction Data' button is visible.
- Application Details:** Shows 'Application File', 'Application State' (with buttons for 'View Application in Progress', 'View Application', and 'View Application'), 'Residency', and 'Language'.
- File Attachments:** A table listing various documents with columns for 'Attachment', 'Description', and 'View'.

Attachment	Description	View
Transcripts - Enrollment.pdf	Academic Record/Transcript - Sherrard Pharmaceuticals, Unit	View
Curriculum_Vite.pdf	Curriculum Vitae	View
GRE_Test_Report.pdf	GRE Test Report	View
IELTS_Test_Report.pdf	IELTS Test Report	View
Personal_Statement.pdf	Statement of Interest (brief summary of where your research interests lie and where do you see yourself in the future)	View

At the bottom, there are navigation buttons for 'Home', 'Evaluator History', 'Additional Academic Info', 'Supplemental Information', 'SOPs Assessment', 'References', 'Questions', and 'Feedback'.

BRIEF HISTORY

- Released new admissions platform in October 2013 built within Campus Solutions
- All application data now housed within Campus Solutions including:
 - Transcripts
 - References
 - Supplemental Documents

BACKGROUND

The screenshot displays a web application interface for managing applicants. At the top, there are navigation tabs: Application Data, Educator History, Additional Academic Info, Supplemental Information, SOPs Assessment, and Referrals. The main content area shows applicant details for 'MIRAC'. Fields include 'User ID', 'Created Date/Time', and 'Created By'. Below this, there are sections for 'Application File', 'Application Status', and 'Biography'. A 'Control Menu' section contains a table of files for review.

File Name	Description	Action
Transcripts - English.pdf	Academic Record/Transcript - Sherrard Pharmaceuticals, Unit	View
Curriculum Vitae.pdf	Curriculum Vitae	View
GRE Test Report.pdf	GRE Test Report	View
IELTS Test Report.pdf	IELTS Test Report	View
Personal Statement.pdf	Statement of Interest (brief summary of where your research interests lie and where do you see yourself in the future)	View

BRIEF HISTORY

- Provides all applicant data in single location
- Allows programs to assess and instantly offer admission to applicants

BACKGROUND

Department Assessment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Use Saved Search: []

Academic Program:	begins with		Q
Application Nbr:	begins with		Q
III:	begins with		Q
Academic Plan:	begins with		Q
Admit Term:	begins with		Q
Academic Program Status:	=		
Program Action:	=		
NCPS Assessment Status:	begins with		Q
Chibwanhige:	begins with		Q
Last Name:	begins with		
First Name:	begins with		
Prog Assessment Status:	begins with		Q

Include History Correct History

BRIEF HISTORY

- Developed custom component “Department Assessment” to push application data and decisions through departments
- Front-end of component was standard “Find an Existing Value” functionality
- Created numerous queries end users could run via Query Viewer to support process

BACKGROUND



BRIEF HISTORY

- Lee Ann Wentzell, Principal Sales Consultant at Oracle
- Gave demo of relatively new features to Western
- Demonstrated the WorkCenter functionality

ANALYSIS

What is a WorkCenter?

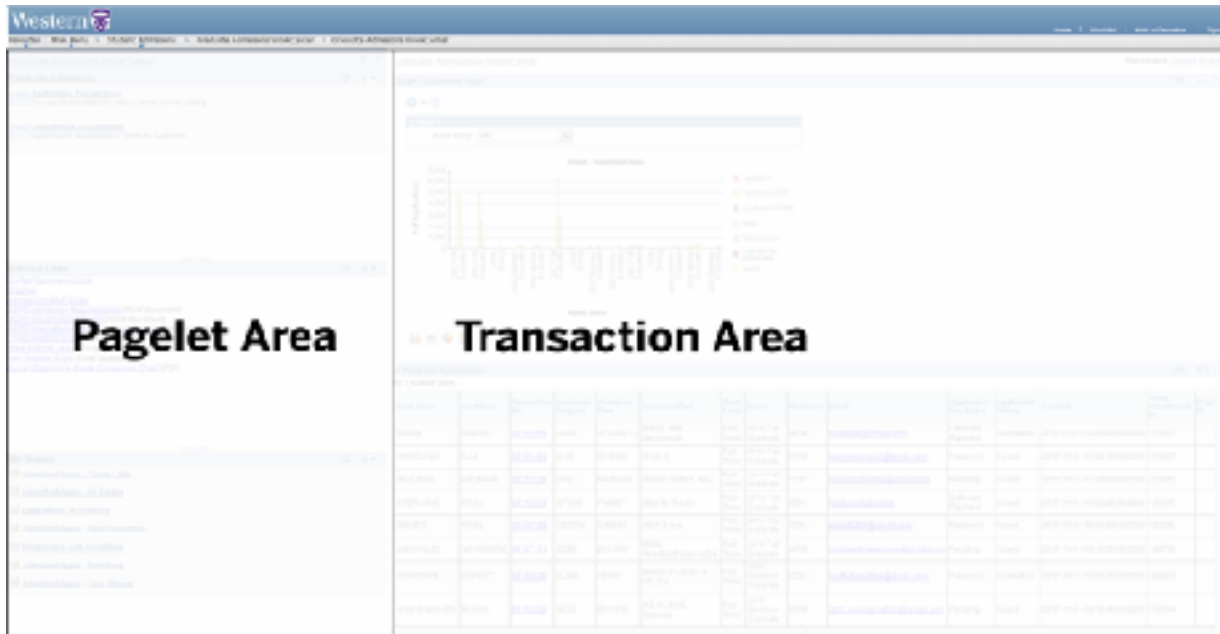
ANALYSIS



- A configurable PeopleSoft page that allows you to combine various existing features
- Consolidate features in PeopleSoft under a core concept or business
- Minimizes the time users spend navigating across the system
- Change the way users interact with the PeopleSoft environment

ANALYSIS

General Setup



ANALYSIS

What is a Pagelet?

- Pagelets are small customizable pages that provide snapshots of content from PeopleSoft or non-PeopleSoft applications or websites.

Pagelets in a WorkCenter take many forms:

- My Work Pagelet
- Links Pagelets
- Queries Pagelets

The screenshot displays a PeopleSoft WorkCenter interface. At the top, there are tabs for 'Main' and 'Reports/Queries'. Below the tabs is a 'My Work' section with a gear icon and a dropdown menu. To the right of this section is an 'Edit Filters' link. The main content area is divided into several sections:

- Alerts:** Owner Actions List (320), WorkList, Write-Offs Pending My Approval, Conversations To Review (20).
- Items:** Open Items (26), Write-Offs Pending Approval, Maintenance Worksheets to Post (1), Transfer Worksheets to Post, Pending Item Groups to Post (14).
- Payments:** Express Deposits to Post (102), Incomplete Payments, Payments to Post (1), Credit Card Payments to Post.
- Links:** Vouchers (Regular Entry, Voucher Maintenance, Voucher Mass Maintenance, Match Workbench, Contract Entry), Payments (Pay Cycle Manager, Review Pay Cycle Errors, Create Express Payment, Mass Payment Cancellation), Other Links (AP WorkCenter Dashboard).
- Queries:** Query Manager, Billing Queries (Billing Inactive Bills, Billing Inactive Bills Summary, Billing Inactive Interface, Inactive Consolidated Bills, Inactive Consol Bills Summary, Pending Credit Card Invoice, Pending Credit Card summary, Pending Worksheet), Billing Pivot Grids.

ANALYSIS

A My Work Pagelet

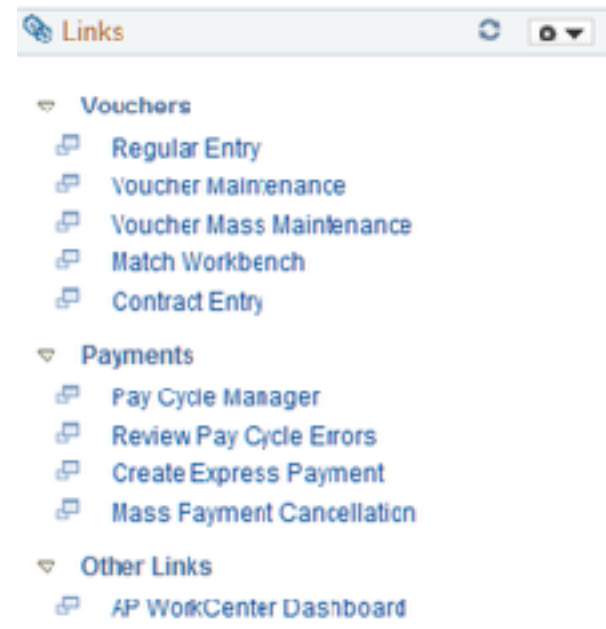
- A pagelet that presents a series of links to particular pre-defined groupings of items
- User can select to display an active count of matches



ANALYSIS

A Links Pagelet

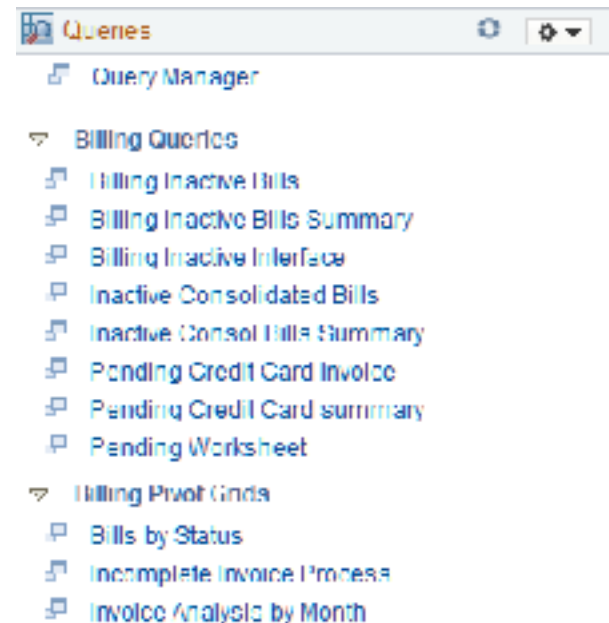
- A pagelet that presents a series of links to components within PeopleSoft or elsewhere on the web



ANALYSIS

A Queries Pagelet

- A pagelet that presents a list of queries that can be run within the WorkCenter



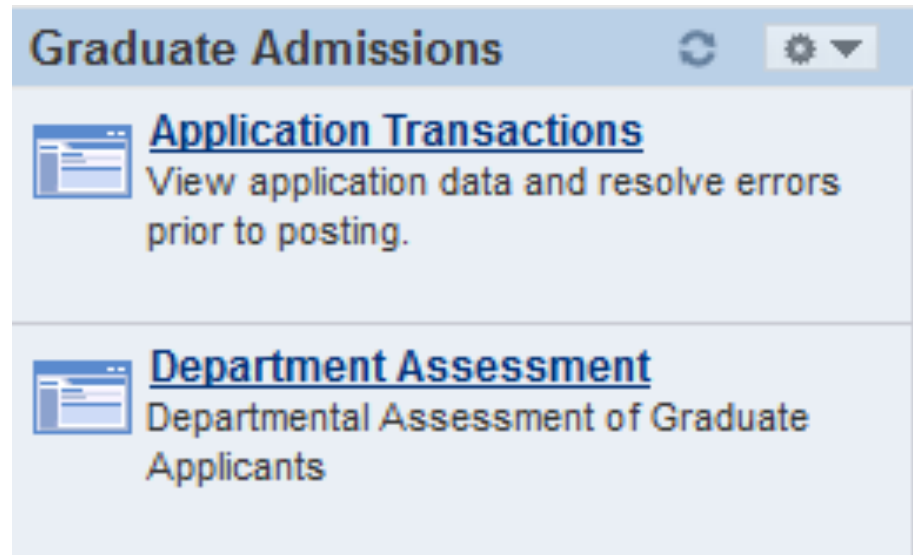
SETUP

- How did we construct our WorkCenter?

SETUP

PAGELET #1 (Links)

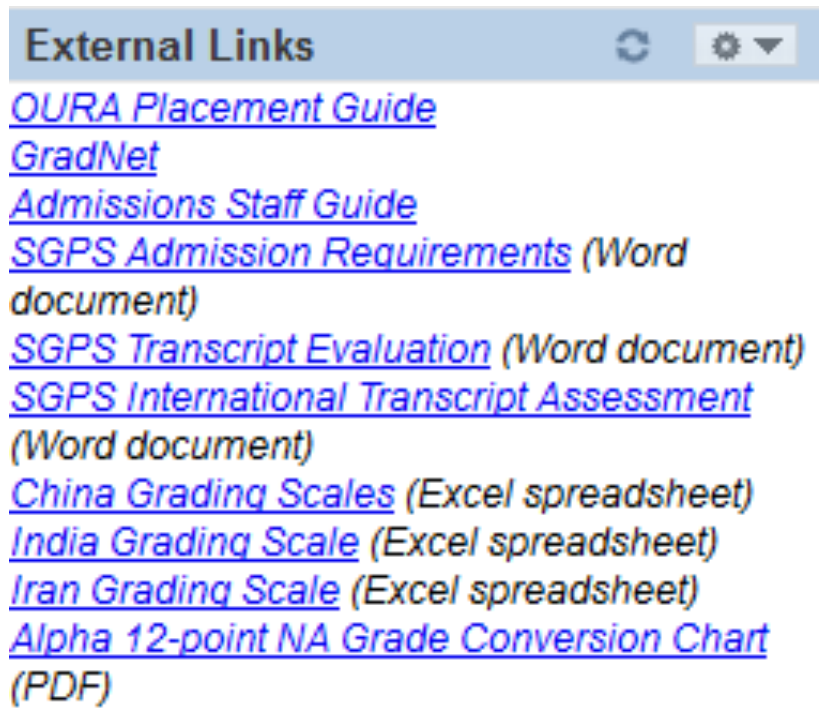
- Can a WorkCenter connect existing admissions components in one location for users?



SETUP

PAGELET #2 (Links)

- Can a WorkCenter connect external web-based information related to admissions?



External Links

- [OURA Placement Guide](#)
- [GradNet](#)
- [Admissions Staff Guide](#)
- [SGPS Admission Requirements \(Word document\)](#)
- [SGPS Transcript Evaluation \(Word document\)](#)
- [SGPS International Transcript Assessment \(Word document\)](#)
- [China Grading Scales \(Excel spreadsheet\)](#)
- [India Grading Scale \(Excel spreadsheet\)](#)
- [Iran Grading Scale \(Excel spreadsheet\)](#)
- [Alpha 12-point NA Grade Conversion Chart \(PDF\)](#)

SETUP

PAGELET #3 (Queries)

- Can a WorkCenter connect all queries available to end users in a single location?



SETUP

PAGELETS IN ACTION

The screenshot displays the Western University Graduate Admissions WorkCenter interface. The breadcrumb trail at the top reads: Home > Student Admissions > Graduate Admissions WorkCenter > Department Assessment. The left sidebar contains several pagelets: 'Graduate Admissions WorkCenter', 'Application Transactions' (with a sub-link 'View application data and search criteria in paging'), 'Department Assessment' (with a sub-link 'Departmental Assessment of Graduate Applicants'), 'External Links' (listing various guides and resources), and 'My Reports' (listing various report types). The main content area is titled 'Application Transactions' and includes a search bar with the placeholder text 'Enter any information you have and click Search. Leave fields blank for a list of all values'. Below the search bar is a 'Find by Criteria' section with a 'Search Criteria' input field and a 'Use Saved Searches' dropdown. The search criteria section contains several fields with dropdown menus and search icons: Application File, Western ID, Thesis/Qualifiers ID, Academic Institution, Academic Center, Academic Year, Agent Name, Application Status, Application Status Date, Assessment Center, Fee Status, Overall Status, Email Address, Username, and Password. At the bottom of the search section are buttons for 'Search', 'Clear', 'View Results', 'Save Search Criteria', and 'Delete Saved Searches'.

SETUP

DYNAMIC REPORTS

- We created some timely dynamic queries designed to push information to users when they enter the WorkCenter
- Reports are set as pagelets to display automatically in the Transaction page as required

QUESTIONS ANSWERED

Recruitment

- Who has started an application?

Application Review

- Who has submitted an application and is awaiting assessment?
- Who is ready for a decision?

Matriculation

- Who has accepted an offer?
- Who has conditions that still need to be cleared?

SETUP

DYNAMIC REPORTS

- Users can select what phase of the admissions process they are focusing on

Tab Name: Graduate Admissions WorkCenter

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalized Layout](#)

Western Custom Pagelets:

- [Search - In Progress Apps](#)
- [Search - Submitted Apps](#)
- [Offer Responses](#)
- [In Progress Applications](#)
- [Outstanding Admission Cond.](#)
- [Ready for GPG Assessment](#)
- [Submitted Applications](#)

SETUP

DYNAMIC REPORTS

- When they enter into the WorkCenter, those reports are automatically available to the user
- Reports use Drilling URLs that connect user to application or email directly

Graduate Admissions WorkCenter

Graduate Admissions

- Application Transactions
View application data and resolve errors prior to onsets.
- Department Assessment
Department Assessment of Graduate Applicants

External Links

- [OU's Placement Guide](#)
- [Grad's Admissions and Support](#)
- [OU's Admission Requirements](#) (Word document)
- [OU's Academic Evaluation](#) (Word document)
- [OU's International Transfer Assessment](#) (Word document)
- [China Graduate Scales](#) (Excel spreadsheet)
- [India Graduate Scales](#) (Excel spreadsheet)
- [UK Graduate Scales](#) (Excel spreadsheet)
- [Alpha 52 Letter/MS Ready Commission Chart](#) (PDF)

My Reports

- Submitted Apps - Contact Info
- Submitted Apps - All States
- Applications in Progress
- Submitted Apps - Adm Comments
- Outstanding Adm Conditions
- Submitted Apps - Refs Rcvd
- Submitted Apps - Educ History

Graduate Admissions WorkCenter

In Progress Applications

By Created Date

First name	Last name	Application ID	Undergrad Program	Academic Plan	Academic year	Start Date	Year	Residency	Status	Application Fee Status
Michael	WILSON	21150381	CLAW	CE151P	LLM Law project based	Full-Time	2018 Fall	Graduate	INTM	Pending
John	WILSON	21150382	SLWR	A209	Master of Library & Info Sci.	Full-Time	2018 Summer	Graduate	CON	Pending
John	WILSON	21150387	CPOL	1Q22	M.A. Political Science	Full-Time	2018 Fall	Graduate	INTM	Pending
John	WILSON	21150387	SMCR	2507	M.Sc. Microbiology	Full-Time	2018 Fall	Graduate	CON	Pending
Michael	WILSON	21150388	SCBE	3112TRPC	MEng Preclinical/Pharmacology	Full-Time	2018 Summer	Graduate	INTM	Pending
Michael	WILSON	21150386	SPAS	2410	Pathologist Assistant	Full-Time	2018 Fall	Graduate	CON	Pending
Michael	WILSON	21150380	SKNE	1698MLC	Min Plan Mgmt & Leadership C	Full-Time	2018 Fall	Graduate	CON	Pending
John	WILSON	21150353	SOCCW	Q349	Master of Social Work	Full-Time	2018 Fall	Graduate	CON	Pending
John	WILSON	21150383	SPEE	DE43EL	Doctor of Ed/Educ Libship	Full-Time	2018 Fall	Graduate	CON	Pending
John	WILSON	21150384	GREHA	2430SLCSC	Ph.D. Rehab Sci., SL SPEECH	Full-Time	2018 Fall	Graduate	CON	Pending

Full Query Results

SETUP

PIVOT TABLES

- Also push automated pivot tables out to users if they choose
- Gives users a graphical statement on application numbers



RESULTS

How have things changed?

RESULTS

RELEASE

- First WorkCenter deployed at Western
- Webinars introduced users to the development
- PDFs support the user with instructions

RESULTS

UNINTENDED CONSEQUENCES

- SGPS now uses the WorkCenter to manage the pre-assessment of applications
- The reports containing drillable URLs are used by programs to connect with faculty members

RESULTS

END USERS

- User are more comfortable with Admissions data now that it is consolidated in a WorkCenter.
- New applications (particularly ones received during non-peak periods) are less likely to be missed

LESSONS LEARNED

- No amount of documentation/training is too much
- Make sure you have the resources to help people get started with a WorkCenter when you roll it out
- WorkCenters go a long way in making occasional users more comfortable with using PeopleSoft

CONCLUDING THOUGHTS

ANY QUESTIONS?

PRESENTERS

Matt Dumouchel

Manager of Information Systems

School of Graduate and
Postdoctoral Studies

mdumouc2@uwo.ca

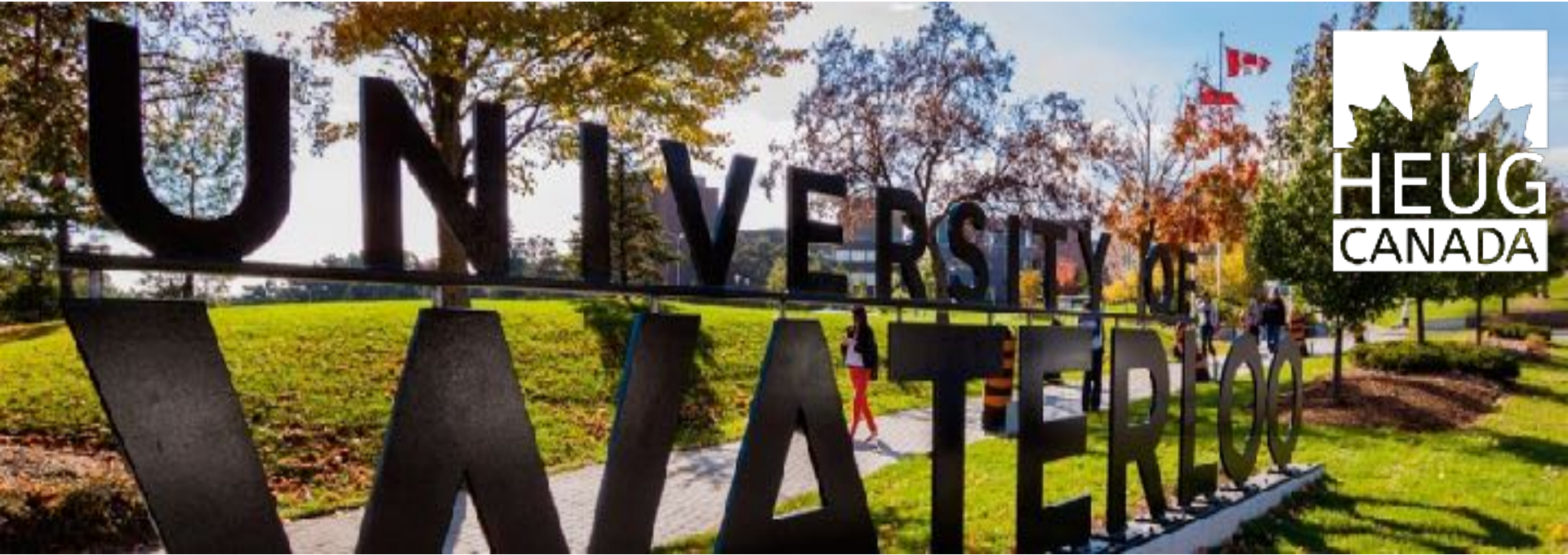
Teri Hern

Manager of Graduate Admissions

School of Graduate and
Postdoctoral Studies

thern2@uwo.ca

**ALL ALLIANCE PRESENTATIONS WILL BE
AVAILABLE FOR DOWNLOAD FROM THE
CONFERENCE SITE**



THANK YOU!

