



Maximizing the Capabilities of Templates

SUNAPSIS[®]

AN INDIANA UNIVERSITY INNOVATION

Overview

- 3.x Standard Templates
- 3.x More from E-Form Based Templates
 - Appended/hidden and Conditionals, Automation, & SEVIS Actions
- 3.x Additional Template Automations
 - Initial I-20 / DS-2019 Data Load Templates
 - Document Check with Templates
- 4.0 Upgraded Template Management

Standard Templates: Constants and Referenced Values

- Constant is a static default value
- Referenced value can pull from another screen on the student/scholar record or from an e-form
- Multiple tables can be included in one template

FIELD NAME	DEFAULT VALUE	REFERENCED VALUE
Name Type *	Actual Passport Name	
Family Name		FAMILY NAME: Bloomington Pre-Arrival Pre-Arrival Checklist Passport Information (e-form);
Given Name		GIVEN NAME: Bloomington Pre-Arrival Pre-Arrival Checklist Passport Information (e-form); MIDDLE NAME (IF ANY): Bloomington Pre-Arrival Pre-Arrival Checklist Passport Information (e-form);

Standard Templates: Match Flag

- Originally (*i.e.* 2005 *sunapsis*) only had templates for inserts and they had to be applied manually
- Added Match checkbox to enable decision point for update vs. insert, which is good if you can identify unique field on the student/scholar table

Name Management			
Name Management			
Name Management			
Passport			
FIELD NAME	DEFAULT VALUE	REFERENCED VALUE	MATCH
Name Type *	Actual Passport Name		<input checked="" type="checkbox"/>

E-Form Populated/Appended Fields

- Templates can be mapped to reference fields from tables or fields on e-forms
- E-Form populate fields (*new in 3.7*) or append extensions could also be used on templates
 - Use case example to update a checklist task based on e-form data, which needs the checklist ID for the template
 - So use one of the append or associate checklist e-form extensions that puts the checklist ID directly on the submitted e-form

E-Form Conditional Fields

- Referenced fields from source tables or e-forms can be multi selected to be merged into one location on insert / update
- Add that capability with conditional e-form fields so you can do a specific insert / update based answers on e-form questions
- So let's continue with our checklist task use case

Configure E-Form for Use Case

- Put a yes/no, drop-down, or radio button on the e-form to drive the decision
- Add hidden fields, with default values (*in our case the checklist task ID*), and make it a conditional field to selected values from above ensuring at least one will be selected with a conditional hidden field value
- Select task extension to associate to a checklist ID, such as the Append Checklist ID task extension

Client Form Design

Field 1: Please select the type of student sponsorship:

Field 2: Task for Athlete

Field 3: Task for Faculty Sponsor

Field 4: Task for Sponsored Student

Second Approver Form Design

Internal Office Use Form Design

Font Family ▾ Font Sizes ▾
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Task for Faculty Sponsor

Field ID for Use in Form Letters:

clientField003

Form Field Type:

Hidden Field ▾

Meta Information:

Maximum Length of Form Value:

50

Default Form Value:

176

Conditional Field:

001: Please select the type of student spons ▾

Conditional Values:

Sponsored by Faculty Member 🖱️

☐ required field

☐ advisor / approver name

☐ conceal field view

☐ advisor / approver email

☐ alert / case display

Submitted E-Form Record

10/07/2016 ✓ Example E-Form for Conditional Template Fields

Client

Please select the type of student sponsorship: Sponsored by Home Government or Agency

Task for Sponsored Student 169

Select Application: 164139

Make Multi Select Template

Edit Field: Checklist Task [TEST]

- **SUNAPSIS Support**
- ▼ **Tech Team**
 - **Ad-Hoc Report**
 - ▼ **Example E-Form for Conditional Template Fields**

Field 1: Please select the type of student sponsorship:

Field 2: Task for Athlete

Field 3: Task for Faculty Sponsor

Field 4: Task for Sponsored Student

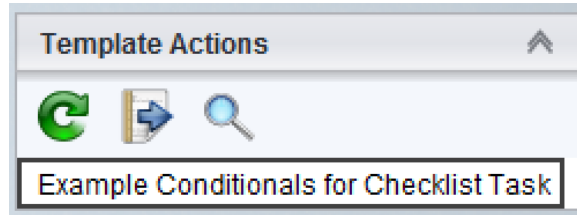
Field 5: Checklist ID

- **approver email test**
- **University Employment**
- **Volunteer / Internships**

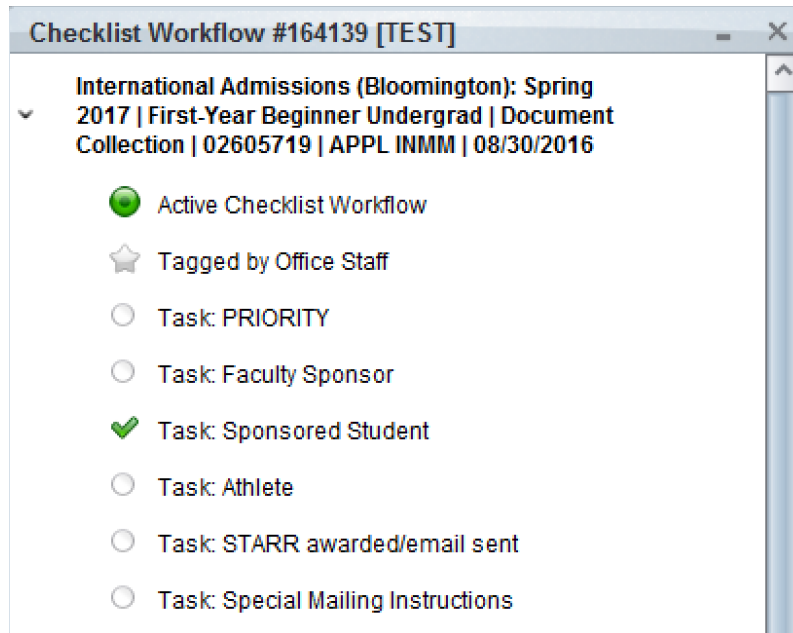
Checklist Task Template

Checklist Office Tasks			
FIELD NAME	DEFAULT VALUE	REFERENCED VALUE	MATCH
Checklist Task		TASK FOR ATHLETE&NBSP; Bloomington Tech Team Example E-Form for Conditional Template Fields (e-form) TASK FOR FACULTY SPONSOR: Bloomington Tech Team Example E-Form for Conditional Template Fields (e-form) TASK FOR SPONSORED STUDENT: Bloomington Tech Team Example E-Form for Conditional Template Fields (e-form)	<input checked="" type="checkbox"/>
Checklist ID		CHECKLIST ID: Bloomington Tech Team Example E-Form for Conditional Template Fields (e-form)	<input checked="" type="checkbox"/>
Status *	Approved		<input type="checkbox"/>

Template Updates Checklist Task



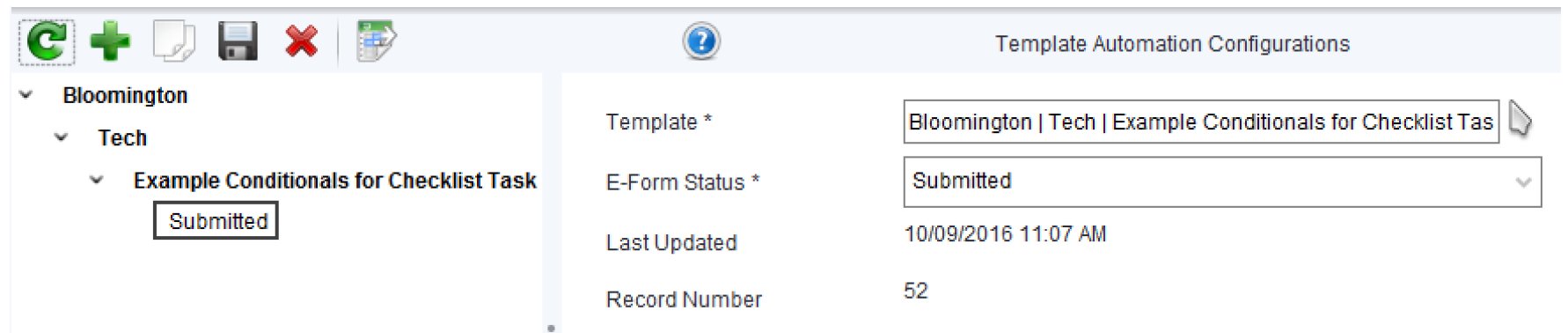
Template available right off the e-form for manual execution



Action will insert or update the checklist task based on matching on the checklist ID and the task ID to mark it as approved, and all based on the answer from an e-form

Let's Automate that Template

From e-form management configure this template to be auto queried or automatic running base on e-form status updates



The screenshot shows the 'Template Automation Configurations' window in the SUNAPSIS application. The interface includes a toolbar with icons for refresh, add, copy, save, delete, and help. A left-hand navigation pane shows a tree structure with 'Bloomington' expanded, containing 'Tech', which in turn contains 'Example Conditionals for Checklist Task'. Below this, a 'Submitted' button is visible. The main configuration area on the right contains the following fields:

Field	Value
Template *	Bloomington Tech Example Conditionals for Checklist Tas
E-Form Status *	Submitted
Last Updated	10/09/2016 11:07 AM
Record Number	52

Another Idea: Template Based on Selected Conditional E-Form Field

As of 3.6 we enabled the Template Auto Populate Queue table to be accessible from the student/scholar record management so you could do:







- Conditional hidden fields setup with the value equaling template's record number from template management
- Another template is setup just following the above checklist task example, this time to insert into the template auto populate queue with the id of the template to run

E-Form SEVIS Actions with Templates

- Enable your SEVIS based e-forms to directly pull up the batch, or directly go the screen in RTI, and populate the values from the template
- Is limited to SEVIS update actions, not creates (*see next slides about automation for create events*)
- Is limited to data on the e-form itself, but populate/append extensions could enable more data points to be associated onto an e-form


E-Form SEVIS Actions with Templates


SEVIS Action


RTI Action ID 1	<input type="text" value="Add Dependent"/>	
RTI Action ID 2	<input type="text"/>	
RTI Action ID 3	<input type="text"/>	
Batch Action ID 1	<input type="text" value="F-1 Student Dependent Structures Dep"/>	
Batch Action ID 2	<input type="text"/>	
Batch Action ID 3	<input type="text"/>	

Configure up to 3 RTI or 3 batch actions that can be executed from an e-form to directly make an event in RTI or batch

SEVIS Actions



 Batch F-1 Student | Dependent Structures | Dependent: Add

 RTI Add Dependent

SEVIS Actions available directly from the e-form right side options

Additional Template Automations

- Initial I-20 / DS-2019 Data Load Templates
- Document Check with Templates

Initial I-20/DS-2019 Data Load Templates

- Originally for incoming students we needed lots of templates that we would manually maintain, and also manual apply when producing I-20/DS-2019
- Now we load the information tied to the admissions info in general configurations:

- ▼ SEVIS Configurations
 - Organization Code Configurations
 - Batch Configurations
 - RTI Configurations
 - Address Transform Rules
- ▼ Templates and Automation
 - Admission SEVIS Configurations for Templates
 - Configure Automatic Template Load for I-20 Data
 - Configure Document Check Templates



Records

Spring 2016
Business Grad Accountancy
ACCTGMSA

Spring 2016
Business Grad Accountancy
TAXATIONMS

Spring 2016
Business-Sys & Acctg Grad Prog
ACCTGMBA

Spring 2016
Business-Sys & Acctg Grad Prog
ACCTGMSA

Spring 2016
Business-Sys & Acctg Grad Prog
ACTFAMBA

Spring 2016
Business-Sys & Acctg Grad Prog
INSYSMSIS

Spring 2016
Law Masters LAWLLM

Spring 2016
Law Masters LAWMCL

Spring 2016
History -GrSch HSTJHTRK

Spring 2016
Hist & Phil of Science-GrSch HPSCMA

Spring 2016
Library & Info Sci Grad Nondeg
INFARCGCRT

Spring 2016
Informatics Graduate

Spring 2016
Journalism -GrSch JOURMA

Spring 2016
Journalism -GrSch JOURMAT

Campus * Bloomington

Admit Term * Spring 2016

OPTIONAL FILTERS BASED ON ADMISSIONS RECORD

Academic Career

Academic Level

Academic Group

Academic Program

Business Grad Accountancy

Academic Degree

Academic Department

Academic Plan Codes (comma separated)

ACCTGMSA

(8 / 250)

SEVIS PROGRAM INFORMATION (F-1 / J-1)

SEVIS Organization Code F-1: Indiana University Bloomington

F-1 Education Level Master's

F-1 Other Education Level

J-1 Category Code

Program Start * 01/03/2016

Program End * 05/31/2017

Configuration Drives a View

Pulls together information from the configurations and the admissions data for view that is accessible on record management (*Admissions – SEVIS Configurations for Templates*) and thus a single template could use that for view:

▼ **Student Academic Information**

Admission Information *

Program Information *

Student Enrollment

Current Course Schedule *

Student Groups *

Student Holds *

Visiting Student *

English Proficiency Scores *

Admission - SEVIS Configurations for Templates

Add on Automation for Initial I-20

Automate the template to use this view, and execute with the data field for newly admitted students via the general configuration setting at:

- ▼ **Templates and Automation**
 - **Admission SEVIS Configurations for Templates**
 - Configure Automatic Template Load for I-20 Data
 - Configure Document Check Templates

Configuration Maintenance

While this is used at IU, and some others (*i.e. University of Illinois*), it can result in a giant configuration table to maintain so some approaches:

- Direct updates through the user interface
- Direct updates through the database (need SQL access)
- Middle approach that we build at IU is a spreadsheet that can be used by the end users to update the values, and then provides an easier SQL output for the DBA

Document Check with Templates

Released in 3.5 a configuration to associate a template to the orientation document check approval:

- ✓ **Templates and Automation**
 - **Admission SEVIS Configurations for Templates**
 - Configure Automatic Template Load for I-20 Data
 - Configure Document Check Templates**

Which enables from document check:

- Template to queue up a SEVIS batch registration event
- Various template updates, such as student holds
- And can have different templates by campus
- ***Coming in 4.1+: feature request to filter on visa type***

Templates in v4

- Templates from 3.7.x migrate as-is and work the exactly the same in 4.0 release
- Improved Template Configuration usability!
- Looking at several feature requests for possible inclusion in next major releases 4.1+



Campus *

Bloomington

Template Group *

F Student Templates

Template Name *

Create I-20

Last Updated

07/16/2017 05:46 PM

Record Number

1911

I-20 Program Information

I-20 Financial Information

SEVIS Number

SEVIS Status

Default: Initial

Education Level

References: F-1 Education Level

Other Education Level

Primary Major

References: Primary Major CIP Code

Second Major

Default: 00.0000 - None

Minor

Default: 00.0000 - None

Program Start

References: Program Start Date

Program End

References: Program End Date

Initial Session Start Date

English Required

Default: Checked

I-20 PROGRAM INFORMATION: EDUCATION LEVEL

☐ Match on the Default Value, or Referenced Value, to Determine an Update or Insert

DEFAULT FIELD VALUE

REFERENCE TABLE: ADMISSION - SEVIS CONFIGURATIONS FOR TEMPLATES

- ☐ Campus
- ☐ Admit Term
- ☐ Academic Career
- ☐ Academic Level
- ☐ Academic Group
- ☐ Academic Program
- ☐ Academic Degree
- ☐ Academic Department
- ☐ Academic Plan Code
- ☐ SEVIS Organization Code
- ☒ F-1 Education Level
- ☐ F-1 Other Education Level Comments

Update Field

Close



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