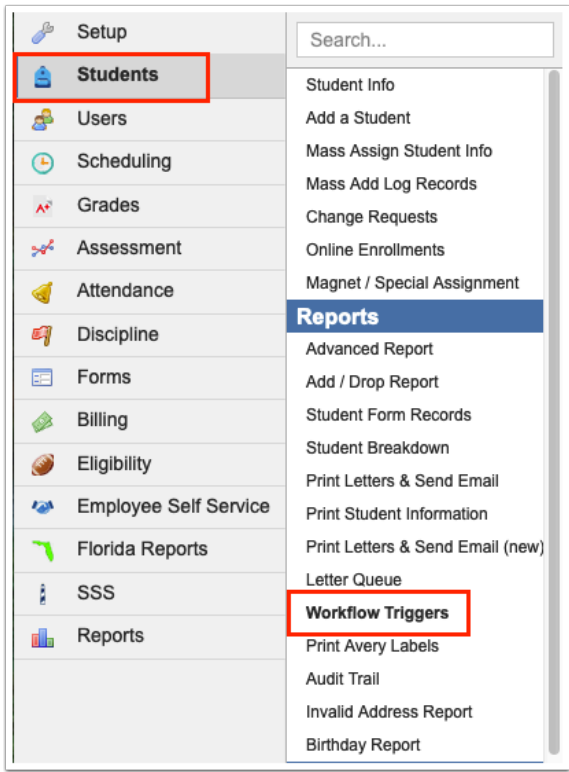


Workflow Triggers

Workflow triggers are used to generate letters, send emails, or create Portal alerts when certain events occur. These events are: Attendance Day Updated, Online Application Finalized, Online Application Saved, Period Attendance Updated, or Student Originated. Workflow triggers based on specific student fields are set up in Setup > [Edit Rules & Workflow](#).

Adding a Workflow Trigger

1. In the **Students** menu, click **Workflow Triggers**.



2. Click **Add Trigger**.

						Add Trigger	Delete Selected
						Search	2/23 2:32
<input type="checkbox"/>	Enabled	Edit	Trigger Event	Event Options	Trigger Action		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 3 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue	Attendance Warning Letter	2/23 2:32
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 10 daily codes (O, N, J, D, U) for Last 90 days	Add a letter to the letter queue	Attendance Warning Letter	2/23 2:32
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 5 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue	5-day attendance letter	2/23 2:32

3. Select the **Event**.

Based on the event selected, additional setup options are displayed.

Attendance Day Updated - This event concerns the student's daily attendance. For example, you can set up a trigger that will send a letter to the letter queue when a student has 2 absences month to date.

- Select the **Period** of time to consider (Year to Date, Semester to Date, Quarter to Date, Month to Date, Last 30 days, Last 60 days, or Last 90 days).
- Select the **One letter per period timeframe** check box to only send one letter during the selected timeframe, instead of generating a letter each time the trigger criteria is met during the timeframe.
- Select the **Count** (number of present codes or absent codes to consider).
- Select the **Codes** to consider (Absent or Present).
- Select the specific Absent or Present codes to consider.

The screenshot shows the 'Add Workflow Trigger' form. Under the 'Event' section, 'Attendance Day Updated' is selected with a radio button. Other options include 'Online Application Finalized', 'Online Application Saved', 'Period Attendance Updated', and 'Student Originated'. In the 'Period:' section, 'Month to Date' is selected in a dropdown menu. The 'One letter per period timeframe:' section has 'No' selected. The 'Count:' section has '2' selected in a dropdown menu. The 'Codes:' section has 'Absent' selected with a radio button, and 'Present' is unselected. Below the codes, there are checkboxes for 'C', 'A' (which is checked), and 'NS'.

Online Application Finalized - This event concerns when an online application is submitted.

- Select the **Form** that will trigger the action.

The screenshot shows the 'Add Workflow Trigger' form. Under the 'Event' section, 'Online Application Finalized' is selected with a radio button. Other options include 'Attendance Day Updated', 'Online Application Saved', 'Period Attendance Updated', and 'Student Originated'. In the 'Form:' section, 'New/Returning Student' is selected in a dropdown menu.

Online Application Saved - This event concerns when an online application is saved.

- Select the **Form** that will trigger the action.

Add Workflow Trigger

Event

☐ Attendance Day Updated
☐ Online Application Finalized
☒ Online Application Saved
☐ Period Attendance Updated
☐ Student Originated

Form: New/Returning Student

Period Attendance Updated - This event concerns the student's period attendance. For example, you can set up a trigger that will send a letter to the letter queue when a student is tardy to any period two times month to date.

- Select the **Range** of time to consider (Year to Date, Semester to Date, Quarter to Date, Month to Date, Last 30 days, Last 60 days, or Last 90 days).
- Select **One letter per period timeframe** to only send one letter during the selected timeframe, instead of generating a letter each time the trigger criteria is met during the timeframe.
- Select the period attendance codes to consider.
- Select which period to consider. If Any Period is selected, the trigger will only count one period attendance record per day.
- Enter the number of days to consider in the **For this many days** text box. This is a required field.

Add Workflow Trigger

Event

☐ Attendance Day Updated
☐ Online Application Finalized
☐ Online Application Saved
☒ Period Attendance Updated
☐ Student Originated

Note: This trigger will only count one period attendance record per day when using "Any Period."

Range: Month to Date

☐ One letter per period timeframe

Execute this trigger when a student receives the following codes:
☐ C ☒ A ☐ P ☐ E ☐ R ☐ NS

For this period: Any Period

For this many days: 2

Student Originated - This event concerns when a student is originated (for post-secondary).

Add Workflow Trigger

Event

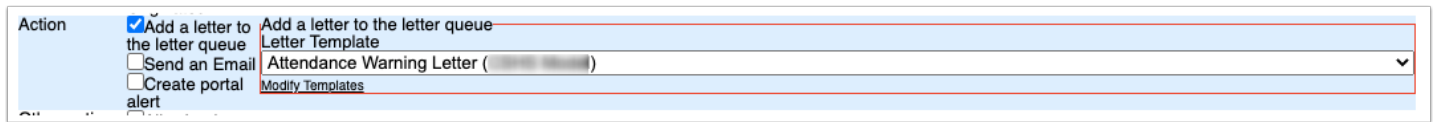
☐ Attendance Day Updated
☐ Online Application Finalized
☐ Online Application Saved
☐ Period Attendance Updated
☒ Student Originated

4. Select the **Action**. One or multiple can be selected.

Based on the action selected, additional setup options are displayed.

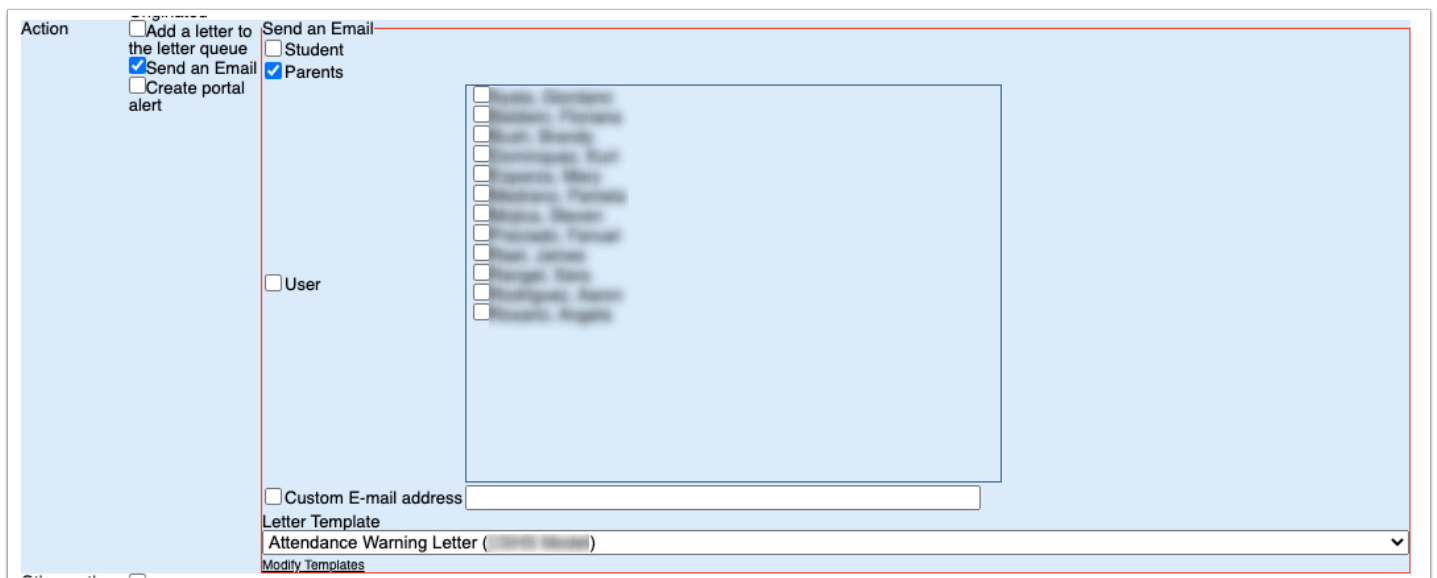
Add a letter to the letter queue - This will generate a letter and send it to Students > [Letter Queue](#) for printing.

- Select the **Letter Template**. Letters are set up in [Print Letters & Send Email](#).
- To modify the selected letter template, click **Modify Templates**. In the pop-up window, make the necessary edits and click **Save & Close**.

A screenshot of a web form titled 'Add a letter to the letter queue'. On the left, under the 'Action' header, there are three checkboxes: 'Add a letter to the letter queue' (checked), 'Send an Email' (unchecked), and 'Create portal alert' (unchecked). To the right of these checkboxes, the form has a section for 'Add a letter to the letter queue' which includes a 'Letter Template' dropdown menu currently showing 'Attendance Warning Letter ()' and a 'Modify Templates' link below it.

Send an Email - This will send an email to the student, parents, a specific user, or a custom e-mail address.

- Select whether to send the email to the student, parents, user (select the user from the list), or a custom e-email address (enter the email address). One or multiple options can be selected.
- Select the **Letter Template**. Letters are set up in [Print Letters & Send Email](#).
- To modify the selected letter template, click **Modify Templates**. In the pop-up window, make the necessary edits and click **Save & Close**.

A screenshot of a web form titled 'Send an Email'. On the left, under the 'Action' header, there are three checkboxes: 'Add a letter to the letter queue' (unchecked), 'Send an Email' (checked), and 'Create portal alert' (unchecked). To the right, under the 'Send an Email' section, there are four options: 'Student' (unchecked), 'Parents' (checked), 'User' (unchecked), and 'Custom E-mail address' (unchecked). The 'User' option is expanded, showing a list of names with checkboxes next to them. Below these options is a 'Letter Template' dropdown menu showing 'Attendance Warning Letter ()' and a 'Modify Templates' link.

i Emails are automatically logged in the students Letter Log via Students > [Student Info](#) when sent from workflow triggers.

Create portal alert - This will display a Portal alert for the selected recipient.

- Select whether to create the Portal alert for the student, parents, user (select the user from the list), or the reporter (for discipline referrals).

- Enter the **Alert Title**.

Action

☐ Add a letter to the letter queue

☐ Send an Email

☒ Create portal alert

Create portal alert

☐ Student

☒ Parents

☐ User

☐ Reporter (for referrals)

Alert Title

5. Select **All schools trigger** to make this trigger available for all schools in the district.

i When "All schools trigger" is selected, all the users in the district are available in the users list for the "Send an Email" and "Create portal alert" actions. When this option is not selected, only users at the school currently selected at the top-right of the screen are available in the list.

6. Leave the **Trigger Enabled** check box selected if the trigger should be immediately active upon adding the trigger. If you do not want the trigger to be active, deselect the check box.

7. Click **Add Trigger**.

Other options: ☒ All schools trigger ☒ Trigger Enabled

The workflow trigger is added to the list at the bottom of the screen.

						Add Trigger	Delete Selected
						Search	2:50 PM
<input type="checkbox"/>	Enabled	Edit	Trigger Event	Event Options	Trigger Action		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 3 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue Attendance Warning Letter		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 10 daily codes (O, N, J, D, U) for Last 90 days	Add a letter to the letter queue Attendance Warning Letter		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 5 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue 5-day attendance letter		
<input type="checkbox"/>	✓	Edit	Period Attendance Updated	Trigger: Earn 2 Codes Attendance Code: T Period: 01	Add a letter to the letter queue Attendance Warning Letter		

Editing a Workflow Trigger

1. Click **Edit** next to the workflow trigger.

						Add Trigger	Delete Selected
						Search	2:50 PM
<input type="checkbox"/>	Enabled	Edit	Trigger Event	Event Options	Trigger Action		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 3 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue Attendance Warning Letter		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 10 daily codes (O, N, J, D, U) for Last 90 days	Add a letter to the letter queue Attendance Warning Letter		
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 5 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue 5-day attendance letter		
<input type="checkbox"/>	✓	Edit	Period Attendance Updated	Trigger: Earn 2 Codes Attendance Code: T Period: 01	Add a letter to the letter queue Attendance Warning Letter		

2. Modify any of the options at the top of the screen.

3. Click **Update Trigger**.

Add TriggerDelete Selected

Update Workflow Trigger

Event

Note: This trigger will only count one period attendance record per day when using "Any Period."

Range: Quarter to Date

☐ Attendance Day Updated
 ☐ Online Application Finalized
 ☐ Online Application Saved
 ☒ Period Attendance Updated

☐ One letter per period timeframe

Execute this trigger when a student receives the following codes:

☐ NA☐ D☐ I☐ N☐ O☐ Q☐ M☐ C
 ☐ E☐ G☐ S☐ NS☐ H☐ U☐ A☐ LE

☐ LU☐ P☐ V☒ T☐ U☐ PT

For this period: Period 1

For this many days: 2

Action

☒ Add a letter to the letter queue
 ☐ Send an Email
 ☐ Create portal alert

Add a letter to the letter queue

Letter Template

Attendance Warning Letter ()

Modify Templates

Other options:

☐ All schools trigger
 ☒ Trigger Enabled

Update Trigger

Workflow Triggers

Page 6

Deleting a Workflow Trigger

- 1. Select the check box next to each workflow trigger to delete.
- 2. Click **Deleted Selected** at the top of the screen.

Add TriggerDelete Selected

1 Selected

Search

<input type="checkbox"/>	Enabled	Edit	Trigger Event	Event Options	Trigger Action
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 3 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue Attendance Warning Letter
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 10 daily codes (O, N, J, D, U) for Last 90 days	Add a letter to the letter queue Attendance Warning Letter
<input type="checkbox"/>	✓	Edit	Attendance Day Updated (All schools)	Earn 5 daily codes (O, N, J, D, U) for Last 30 days	Add a letter to the letter queue 5-day attendance letter
<input checked="" type="checkbox"/>	✓	Edit	Period Attendance Updated	Trigger: Earn 2 Codes Attendance Code: T Period: 01	Add a letter to the letter queue Attendance Warning Letter

- 3. In the confirmation pop-up, click **OK**.

