

# Academic Affairs Kuali Build CoP

A Community of Kuali Build Users to Connect, Collaborate and Create

Center for Operational Excellence | August 20, 2025



# About

## Academic Affairs Kualiti Build Community of Practice

*"A community of Kualiti Build users to connect, collaborate and create."*

Designed to support the refreshed Strategic Plan and strategy for **Operational Alignment**.

*Deploy common tools and structures to enable flexibility and efficient coordination with local solutions, also making it easier to work across the university and extend the reach of ideas and activities.*

**C**

**Connect:** -Build Community -Grow Resources -All Experience Levels

**C**

**Collaborate:** -Bring Qs & As -Learn by Collective Experience -Share Lessons Learned

**C**

**Create:** -Build Better Apps -Improve Workflows -Reduce Waste



# Contents

- \* Introductions
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- \* Builder Shares
- \* Open Q&A

# Introductions

- Name
- Unit
- What's your next KB App?

# What's New?

# News!

## Kuali Announcements

- [Integrations Now Available in Anonymous Forms](#)
- [Limit Selectable Dates Configuration Based on Other Date Fields](#)

# Builder Shares

# Builder Discussions

- **BOTS Update, Kevin Waldrop (Ofc of EVC) AAFA-COE**

## **Business Office Ticketing in ServiceNow (BOTS)**

Process of using shared Kuali Build forms to collect customer requests for a group of central campus business offices.



# BOTS

## Business Office Ticketing in ServiceNow

AABO EMBO IABO LiBO RecBO SLBO UCBO VCSABO



- WELCOME to the **Library Business Office** (LiBO) - launching soon! (Aug/Sep)
- BOTS All **Representatives** Mtg in OCT - TBD [AP, DSA, Fiscal, HR, StuEmpl]
- Planning underway for an **all-ticket process (no email)** by JAN 1st
- Reminder, ALL SNOW AGENTS welcome to the monthly SNOW Office Hours

# Open Q & A - Discussion

# Next Session

**Sep 17<sup>th</sup> 3:00pm**

**3rd Wednesdays, 3:00pm - 3:50pm**

*Join the conversation online or zoom:*

CHAT via MS Teams: [AA Kual Build CoP](#)

MTGs via Zoom: <https://ucsd.zoom.us/j/91716687161>

## 2025 Meetings

Wed, Feb 19, 3:00pm

Wed, Mar 19, 3:00pm

Wed, Apr 16, 3:00pm

Wed, May 21, 3:00pm

Wed, Jun 18, 3:00pm

Wed, Jul 16, 3:00pm

Wed, Aug 20, 3:00pm

**Wed, Sep 17, 3:00pm**

Wed, Oct 15, 3:00pm

Wed, Nov 19, 3:00pm



# Thank you!

Kevin Waldrop  
kwaldrop@ucsd.edu

# CoP Suggestions for New Kuali Builders



Waldrop, Kevin 5/21 3:03 PM

## Today's CoP Topic - What would you suggest for a new Kuali Builder?

As part of today's CoP Introductions, we are asking each attendee to reply to this question. Do you have advice, a tip, a link, an idea for someone new to Kuali Build? How can we help our new Builders? Add your comments below, and thank you!



Hendricks, Nicole 5/21 3:08 PM

Shadow a Kuali SME and utilize the APIs



Erickson, Nickolaus 5/21 3:08 PM

If you have the opportunity, chat with other builders to see what they have done. If you're a visual person, write out off Kuali workflow how you want a form to go and then start plugging things into the workflow to see that it works the way you wanted. Test test test before sending out.

# CoP Suggestions for New Kuali Builders



Schroeder, Mindy 5/21 3:09 PM

Kuali is finicky. When you're working on the workflow, you can lose your work if the workflow isn't saved. Make sure you have someone show you how to save it so you don't lose it.



Weems, Bonnie 5/21 3:09 PM

Search the documentation before Google. They do a pretty good job keeping it up-to-date and the platform options are constantly changing



Hoffmann, Giulia 5/21 3:09 PM

Test out whatever forms you've built with some colleagues first before you go live! Lots of different types of colleagues/across various units so you can see if there are any issues with various people viewing things, etc.



Levy, Katherine 5/21 3:12 PM

See if someone else has a form with features or fields you like and use it as a baseline to get started.

# CoP Suggestions for New Kuali Builders



Knowles, Margarita 5/21 3:16 PM

It was easy to learn, and fun to build forms.



Waldrop, Kevin 5/21 3:55 PM

(Watch a video, [links here](#)) Start small! Create a simple form with 1 or 2 steps in the workflow and watch it work! It gives a great boost to add another step, and keep growing your experience!



## Kuali Build CoP

Academic Affairs Kuali Build Community of Practice (AA KB CoP)

coe.ucsd.edu



**THANK YOU** all for attending today! The [AA Kuali Build CoP web page](#) has been updated and the slides are available. Have a great rest of your week and an **enjoyable long weekend** ahead!

Website:

[“AA Kuali Build CoP”](#)

Drawer:

[“Kuali.Co Links”](#)