

# Academic Affairs Kuali Build CoP

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

***NEW USERS Edition!***

Center for Operational Excellence | November 19, 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

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# Introductions

- Name
- Unit
- How much does/will your team use Kuali Build?

# What's New?

# News!

## Kuali Announcements

- **New Feature: Track Document Edits with History in Form Settings**
  - You can now enable History in **Form Settings** to track document changes throughout the workflow process.
- **New Feature: Routing to External Users**
  - You can now send **Approval**, **Acknowledgement**, and **Task** workflow steps to people outside your system — even if they don't have a Kuali user account/login.
- **New Feature: Versionless Forms**
  - A new option designed for business processes that don't require workflow routing but need to be updated and maintained over time.

# More News!

- **Auto Save on Navigation in Multi-Page Forms**
  - Your work in multi-page forms will be saved automatically whenever you move between pages — helping prevent data loss and streamline form completion.
- **October Updates**
  - Added email address to all user lookups in the system to help avoid confusion caused by name similarities.
- **Kuali Days 2026, April 26-28, Philadelphia, PA** ([VCAA-SETER](#))

# Builder Shares



# Getting Started as a Builder

Bookmark the [AA Kualo Build CoP](#)

- See the drawer: [Kualo.co Links](#)
- Use the section: [Get Access](#)
  - Visit the [Blink: Kualo Build](#) page
- Check out the [AA Shared Resources](#)
- Attend [Monthly Gatherings](#) and View Slides
- Bookmark the Teams Chat [AA Kualo Build CoP](#)

A great place to start!

Best resource for training videos!

Request a sandbox - try risk free!

Campus ITS info to get you started.

Shared instructions for any use

No registration, drop in, ask, learn!

Ask now! Updates/alerts shared live.

# 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

Website:

[“AA Kuali Build CoP”](#)

Drawer:

[“Kuali.Co Links”](#)



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](http://coe.ucsd.edu)



# **Open Q & A – Demo – Discussion**

# Next Session

**Jan 21<sup>st</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>

## 2026 Meetings

Wed, Jan 21, 3:00pm

Wed, Feb 18, 3:00pm

Wed, Mar 18, 3:00pm

Wed, Apr 15, 3:00pm

Wed, May 20, 3:00pm

Wed, Jun 17, 3:00pm

Wed, Jul 15, 3:00pm

Wed, Aug 19, 3:00pm

Wed, Sep 16, 3:00pm

Wed, Oct 21, 3:00pm

Wed, Nov 18, 3:00pm



# Thank you!

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